GENESYS™

How Workforce Management works

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- Administrator
- Agent
- Supervisor

Workforce Management (WFM) provides the tools that enable contact center managers to better manage their workforce, by creating accurate staffing plans that account for projected contact volumes and average handle times, and the various agent skills and skill levels.

Managers achieve these goals, by using WFM's advanced forecasting, scheduling, and real-time adherence capabilities.

Related documentation:
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What Workforce Management does

Workforce Management is designed for the true multi-media, multi-site environment, providing optimal schedules for multi-skilled agents who handle customer interactions of different media types. Agent preferences, skills, proficiency, customer segmentation, historical trends, email response times, and outbound call lengths are all considered within the forecast, schedule, and adherence components.

How Workforce Management works

WFM is designed to integrate with the Genesys Management Framework components and Genesys Universal Routing. WFM's key functionality is presented through a web interface, which includes Supervisor and Agent applications.

Supervisors can create forecasts and proposed future schedules. They can also integrate agent's schedule and overtime bids into real schedules, and perform real-time contact-center performance and agent-adherence monitoring.

Agents can request time off, specify working hours, and trade schedules with other agents without sacrificing optimal staffing levels.

Set up the environment

Players: Administrators

Actions: Prepare your environment by integrating WFM with Genesys Admnistrator, enabling you to leverage real-time statistics, contact-center performance, and agent adherence data across all

communication channels.

Integrating WFM with Genesys Universal Routing (URS) enables call-routing based on WFM schedules, thereby attaining a balanced multi-skill workload for agents and improved schedule adherence.

- Integration with Other Genesys Solutions
- Importing Objects from Genesys Administrator (to WFM)
- Enterprise Routing Integration
- Introduction to Routing Workflows

Plan and secure WFM objects

Players: Administrators

Actions: Plan and secure organization and policy objects, user roles, and access privileges.

- Policy objects
- Configuration objects
- User security

Create workforce reporting metrics

Players: Administrators

Actions: Set up performance and adherence metrics for your track your workforce service level goals.

- Performance reporting metric
- Adherence reporting metrics

Manage organization, policies, and user access

Players: Supervisors

Actions: Manage organizational units, policies, and user roles and access privileges.

- Policies
- Configuration
- User roles and access privileges

Create and adjust forecasts

Players: Supervisors

Actions: Use WFM's forecasting tools and wizards to create forecast scenarios, evaluating volume and staffing estimates, making adjustments, and choosing optimal scenarios to publish to the Master Forecast.

- Forecasts
- Forecast Scenarios
- Master Forecast

Create and manage schedules

Players: Supervisors

Actions: Use WFM's scheduling tools and wizards to create schedule scenarios, compare staffing coverage to the forecasted staffing, making adjustments, and choosing optimal scenarios to publish to the Master Schedule.

- Schedules
- Schedule Scenarios
- Master Schedule
- Publishing schedules

Manage scheduling change requests

Players: Supervisors

Actions: Use WFM's Schedules module to manage day-to-day scheduling tasks,such as overtime and schedule bidding, time-off requests, and schedule trades.

- Tme-off requests
- Time-off bidding
- Schedule bidding
- Overtime bidding
- Schedule trading

Monitor performance and adherence

Players: Supervisors

Actions: Use WFM's real-time contact-center performance and agent-adherence monitoring tools to immediately adjust the number of agents working on a specific activity if service-level statistics fall outside of the acceptable range.

- Performance monitoring
- Adherence monitoring

Manage personal schedules and time-off

Players: Agents

Actions: Use the WFM Web for Agents application interface to perform the following tasks:

- View your schedule and indicate your schedule preferences
- Bid on schedules and overtime offers
- Request time off and view your time-off totals
- View other agents' schedules (if enabled at your site).
- Trade your scheduled days with other agents (if enabled at your site).
- View and change your personal settings.
- Schedules
- Trading
- Time off
- Bidding
- Personal information