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Genesys Multicloud CX Use Cases

Genesys Forecasting and Scheduling (WF01) for Genesys Multicloud CX

Optimize employee utilization and operational effectiveness by forecasting and scheduling for all omnichannel interactions while empowering staff through various scheduling techniques and empower employees with self-administration of their schedule.

What's the challenge?

Optimizing employees' schedules is a tricky balance. Under staff, and customer experience can suffer as wait times climb, SLAs slip, and agents feel pressured. It's hard to create balanced schedules that allow your company to be responsive to digital interactions while considering employee hours, contracts, preferences and time off, and labor laws. Shrinkage is eroding the amount of time agents spend handling customer interactions which leads to increased operational expense, reduced service levels, and customer churn. As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Staffing for peaks leaves some people sitting and waiting for work, but staffing for the average load means unhappy customers or incomplete work during peaks.

What's the solution?

Find the right balance. Your Genesys solution automatically gathers data, making it easy to get accurate forecasts and scheduling scenarios across queues and activities. Genesys WFM Solution also improves forecast and schedule accuracy by including shrinkage in the plan. Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Back-office scheduling tools to effectively and accurately forecast work loads, with schedule automation and manual management processes.

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Use Case Overview

Story and Business Context

This use case describes how Genesys Workforce Management helps you deliver a set of optimized schedules, utilizing agent skills and contract rules while providing editing and monitoring capabilities in the contact center.

A critical aspect to routing the call to the right agent is having an agent with the needed skills available to meet demand. Our solution optimizes staffing levels throughout the day and week to meet demand. As caller needs are identified and available skill segment agents are known, then optimal matching of the two can occur. Getting the caller to the most appropriate resource on the first pass results in fewer transfers, shorter contacts, and improved customer satisfaction.

The solution offers visibility into current information on agent performance metrics, schedule adherence, and forecast variances. With this information, our solution allows for better management of variances between target and actual availability. Our solution also allows for specific adherence tools such as thresholds for maximum acceptable handle times.

The solution enables the precise scheduling of contact center agents based on integrated forecasting of expected activity. That means organizations are more likely to have an appropriate level of staffing for all portions of the workday. The result is reduced staffing costs, reduced telephony expenditures, and improved customer satisfaction.

When a contact center can effectively and accurately forecast and schedule for immediate and deferred work items, efficiency increases and centralization and standardization add even more value.

Forecasting and tracking shrinkage allows a business to deliver a more efficient resource/demand plan by taking that factor into account.

Shrinkage describes the percentage of time that employees are not handling interactions. Examples of different types of shrinkage:

- Planned
 - Vacations
 - Meetings / Training
- Unplanned
 - Sickness
 - Emergency Situation

This use case also focuses on operational efficiency and employee empowerment through automated time off processing, featuring:

- Time off balance is automatically calculated and recalculated when supervisors or agents update time off.
- The time off balance for each agent is automatically calculated at the beginning of every time off year and when the date associated to a time off rule is reached.
- Control of the number of agents on time off in the time off limits.
- Time off tracking to support shrinkage calculations applied to the staffing forecasts. This use case provides the following business benefits:

This use case also focuses on operational efficiency and employee empowerment through enabling the employee shift bidding process. In this process, planners build employee profiles rather than individual employee schedules. Once schedules are created, the employees are asked to populate their individual profiles with their preferred shift combinations.

Contrary to the use of rotating patterns and agent shift preferences, Workforce Management Schedule Bidding allows supervisors to build schedules based on the best coverage available within the predefined business rules, constraints, and labor laws. The supervisor controls which agents can bid on schedules and the dates available for bidding, allowing for complete operational control.

Traditionally, back-office environments have not enjoyed the advanced contact center benefits that workforce management solutions have provided due to the non-integrated nature of such environments. Using Genesys Workforce Management coexisting with a Genesys Enterprise Workload Management solution, businesses can effectively and accurately forecast and schedule back-office work items.

Use Case Benefits*

The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line:

Use Case Benefits	Explanation
Improved Employee Satisfaction	Empower employees by allowing them to self-manage their schedules against pre-determined profiles that correspond with their contractual and shift obligations. Allow employees to select profile schedules based on their personal preferences.
Improved Employee Utilization	Improve agent adherence to workforce schedule by gaining better control and management of variances between target and actual availability and shrinkage through visibility into current information on agent performance metrics, schedule adherence, and forecast variances. Improve utilization by optimizing planning and resource utilization through accurate omnichannel forecasting & scheduling and skills.
Reduced Administration Costs	Reduce manual workforce scheduling activities by decreasing the time and costs associated with manual WFM efforts through the automatic updates of data, schedule shifts, and database for skills and schedules. Reduce overtime expenditures by improving accuracy and precision of staff forecasting through Genesys WFM planning. Reduce operational planning time by decreasing

Use Case Benefits	Explanation
	the effort of approving and managing time off requests. Automated scheduling for back-office employees reduces administration effort and cost.
Reduced Employee Attrition	Empower agents with more control over their schedules by identifying skill gaps and extending mobility and easy-to-use web-based tools.
Reduced Overtime Costs	Optimizing Employee occupancy reduces overtime and therefore overtime costs. Improving strategic and long-term planning for back-office staffing also reduces overtime costs.

Summary

Workforce Scheduling for Voice delivers a set of optimized schedules, utilizing agent skills and contract rules while providing editing and monitoring capabilities in the contact center. Omnichannel Workforce Scheduling allows users to forecast and schedule for non-immediate (“deferred”) work items like back office and digital. With Employee Schedule Preferences. Employees can self-manage their time off, controlled through business rules.

Shrinkage is a generic term used in contact centers to describe the percentage of time that employees are not handling interactions. It must be planned for to allow service targets to be met to an appropriate level of efficiency. Genesys WFM provides various shrinkage management options.

Shift Bidding provides the capability for workforce planning teams to generate schedules based on the profiles of their configured employees. Once generated, these profiles can be pushed to the employee for preference selection. Genesys WFM, when integrated with a Genesys EWM solution, also allows users to forecast and schedule for back-office work items.

Use Case Definition

Business Flow

Forecasting

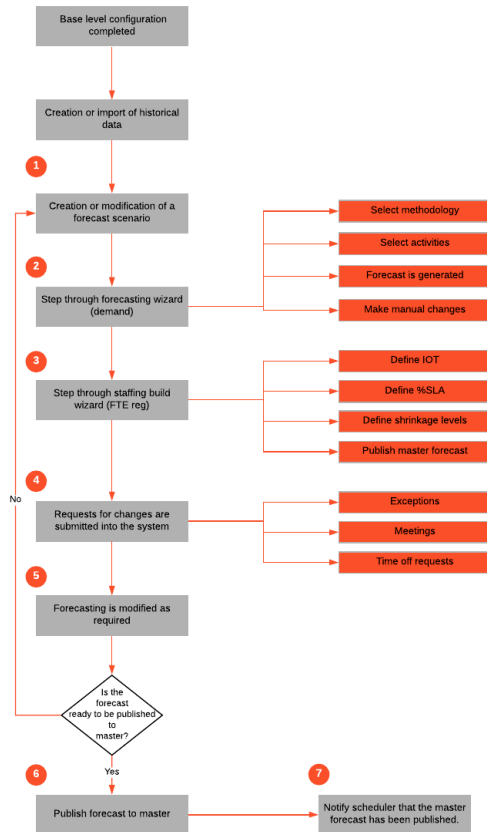
The business flow described below requires the base configuration of the WFM to be completed and historical data to be available. The base configuration will be done by Genesys Professional Services within the scope of this use case as described below.

Business Flow

(2) Scheduling



Forecasting



Business Flow Description The forecaster imports historical data into the configured system. The forecaster works through the forecast process:

1. Creates a scenario or continues working on a previously saved scenario.
2. Uses the Forecasting wizard to build a volume forecast:
 - selects the appropriate forecasting methodology
 - selects which activities to forecast
 - forecast is generated
 - makes manual changes
3. The forecaster uses the Staffing Build Wizard to determine the FTE requirements:
 - defines indirectly occupied
 - defines service level targets
 - defines shrinkage levels
 - publishes the master forecast
4. Supervisors and Agents submit requests for changes into the system:
 - Exceptions
 - Meetings
 - Time off requests
5. The forecaster modifies the forecast as required
6. When the forecast is ready to be published, the forecaster publishes it to become Master
7. The Scheduler is notified that the Master forecast is published

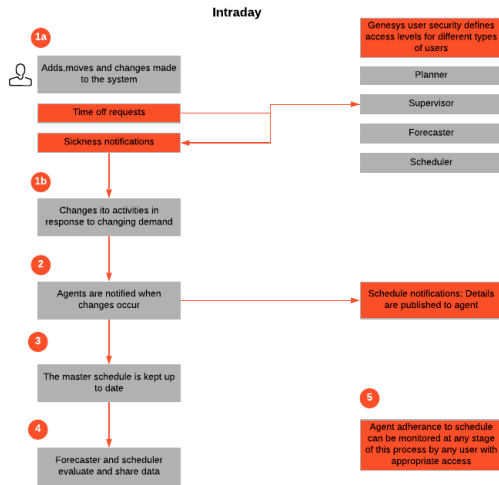


Business Flow Description

1. The scheduler validates & sense checks the live forecast
2. The scheduler uses the 'Schedule Build Wizard' to generate schedules:
 - selects sites and build parameters for each site
3. Manual modifications are made as needed
4. The scheduler publishes the master schedule
5. Agents are notified of the detail of their working hours
6. The schedules are modified as required
7. Once the schedule is ready for hand-off to Intraday Management, the Scheduler publishes the Master Schedule and Intraday Management is informed.

Business Flow

(3) - Intraday

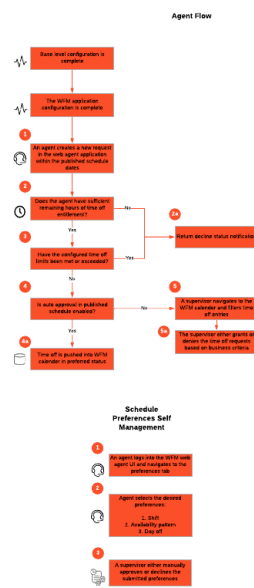


Business Flow Description

1. The forecasters, schedulers, planners, or supervisors manage adds, moves, and changes to existing schedules based on their individual access rights, for example:
 - Time off / sickness requests
 - Changing breaks & meals in response to changing demand
2. Agents are notified of changes as appropriate
3. Master schedule is kept current
4. Scheduler and Forecaster evaluate accuracy of forecast to actual and adjust accordingly.
5. Supervisors can monitor the adherence of the agents in their team to the published schedule.

Business Flow

(4) - Employee Schedule Preferences and Time-Off - Supervisor and Agent Flows



Business Flow Description Supervisor Flow

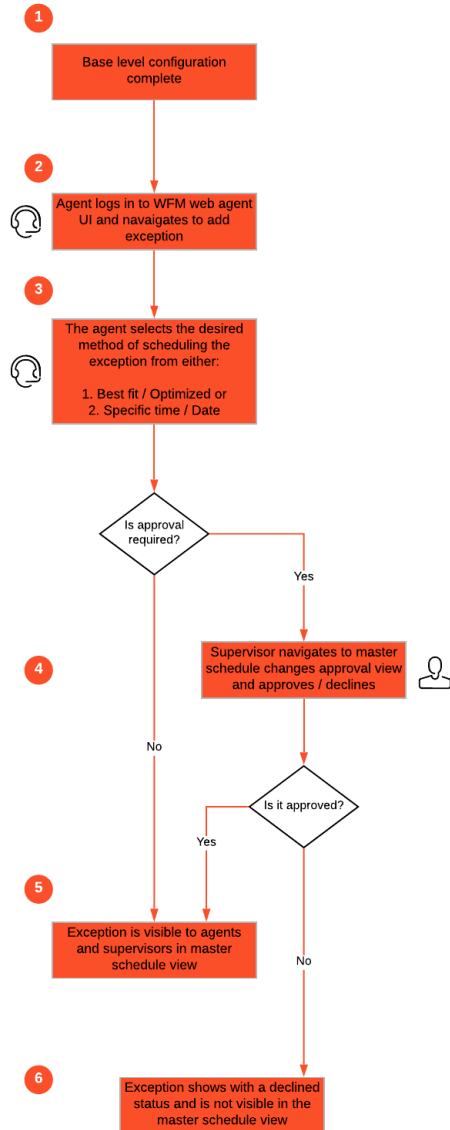
1. Base configuration complete.
2. Supervisor logs in to Web Supervisor application and navigates to Calendar > Time Off Limits.
3. Supervisor enters values for time off Limits (void = unlimited).
4. Supervisor navigates to Policies > Time Off Types.
5. Supervisor configures time off Types and associates with Schedule State Groups.
6. Supervisor navigates to Policies > Time Off Rules.
7. Supervisor creates time off Rules to calculate time off balance (usually based on agent's contract).
8. Supervisor assigns time off Rules to agents with an effective start date (end date is populated automatically by the system).
9. Several time off Rules can be assigned to each agent, mirroring their career path and possible increased entitlement.
10. Agent creates request in Web Agent application outside of published schedule dates.
11. Time off is automatically granted, providing that the agent has enough hours remaining and the time off Limits have not been met.
12. WFM Builder automatically picks up the time off request during the schedule build for the appropriate dates.

Agent Flow

1. Agent creates a request in the Web Agent application within the published schedule dates.
2. Settings previously configured in WFM Application Options determine whether the time off request is automatically processed in the published schedule.
3. Time off is pushed to the WFM Calendar in Preferred status, providing that the agent has enough hours remaining and the time

Business Flow

(5) - Employee Schedule Preferences - Exceptions



off Limits have not been met.

4. If auto-approval in the published schedule is not enabled, the supervisor navigates to the WFM Calendar and filters on time off entries.
5. Supervisor grants/declines time off requests based on business criteria.

Schedule Preference Self-Management

1. Agent logs in to the WFM Web Agent UI and navigates to the Preferences tab.
2. Agent selects desired preferences:
 - Shift
 - Availability Pattern
 - Day Off
3. Supervisor manually approves or declines the submitted preferences.

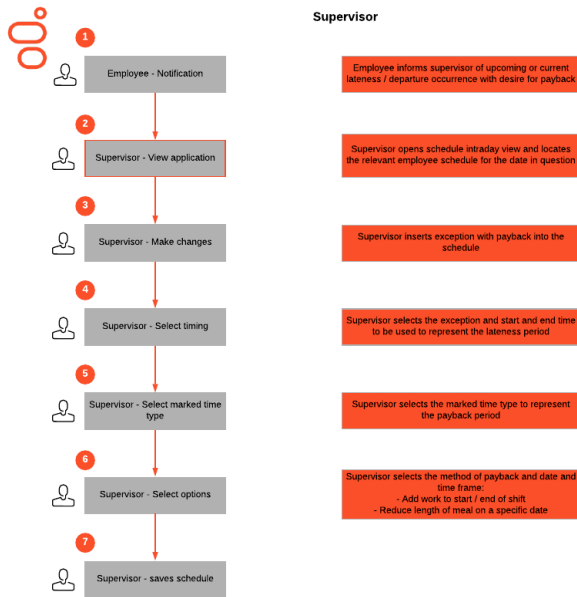
Business Flow Description

1. Base configuration complete.
2. In the Web Agent application, the user navigates to Add Exception.
3. Agent selects how they want to schedule the exception:
 - Best fit/optimized
 - Specific time/date
4. If supervisor approval is required, the supervisor navigates to the Master Schedule Changes Approval view and approves/declines the agent-initiated exception.
5. Exception is visible to agents and supervisors in the master schedule.
6. If the supervisor declines the request, it appears as declined in the master schedule view.

Business Flow

(6) - Employee Schedule Preferences - Lateness Payback

Supervisor Flow



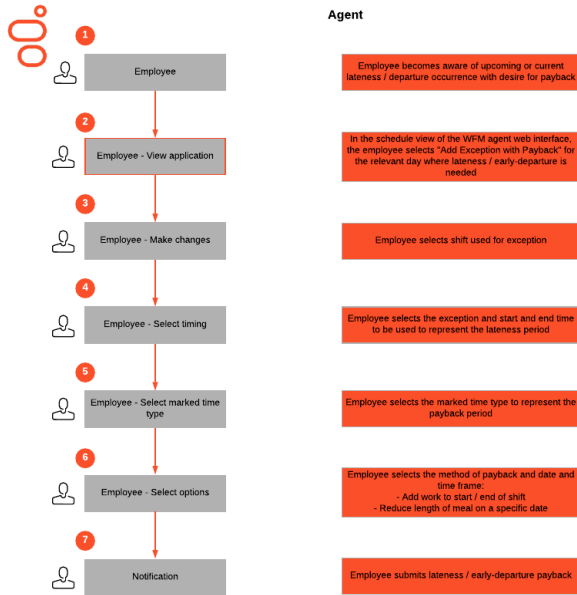
Business Flow Description

1. Supervisor is notified by an employee of upcoming or current lateness/early-departure occurrence with desire for payback.
2. Supervisor opens the Schedule Intraday view and locates the relevant employee schedule for the date in question.
3. Supervisors insert Exception with Payback into the employee's schedule.
4. Supervisor selects the Exception and start and end time to be used to represent the lateness period.
5. Supervisor selects the Marked Time type to represent the payback period.
6. Supervisors select method of payback and date and time frame:
 - Add work to start/end of shift
 - Reduce length of meal on a specific date
7. Supervisor saves schedule.

Business Flow

(7) - Employee Schedule Preferences - Lateness Payback

Agent Flow

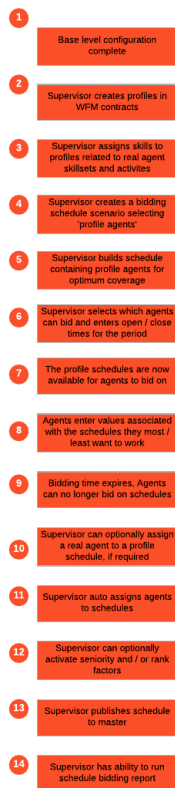


Business Flow Description

1. Employee becomes aware of upcoming or current lateness/early-departure occurrence with desire for payback.
2. In the Schedule view of the WFM Agent Web interface, the employee selects "Add Exception with Payback" for the relevant day where lateness/early-departure is needed.
3. Employee selects Shift Used For Exception.
4. Employee selects the exception and start and end time to be used to represent the lateness period.
5. Employee selects the Marked Time type to represent the payback period.
6. Employee selects the method of payback and date and time frame:
 - Add work to start/end of shift
 - Reduce length of meal on a specific date
7. Employee submits lateness/early-departure payback.

Business Flow

(8) - Shift Bidding



Business Flow Description

1. Base Configuration Complete.
2. Supervisor creates Profiles in the WFM Contracts.
3. Supervisor assigns skills to the profiles related to real agent skill sets/WFM activities.
4. Supervisor creates a Bidding schedule scenario selecting Profile Agents.
5. Supervisor builds schedule containing Profile Agents for optimum coverage.
6. Supervisor selects which agents can bid on the schedule and enters open/close times for the Bidding period.
7. The Profile Schedules are now available for agents to bid on.
8. Agents enter values associated with the schedules they most / least want to work.
9. The Bidding time expires, and agents can no longer bid on schedules.
10. Supervisor can optionally assign a real agent to a profile schedule.
11. Supervisor auto-assigns agents to schedules.
12. Supervisor can optionally activate Seniority and/or Rank.
13. Supervisor publishes Schedule to Master.
14. Supervisor can run Schedule Bidding Report.

Business and Distribution Logic

Business Logic

A prerequisite to any basic WFM deployment is a formal Discovery process with resulting commensurate documentation.

This diagram shows the basic components that need to be considered when configuring WFM.



Configurable
Objects

Employee Engagement - WFM - Configuration



With Employee Schedule Preferences, time off rules, limits, and configuration are specific to the customer, vertical, region, and country laws, and so can vary widely. However, the base requirements are:

- Time off Limit Values

-
- Time off Types
 - Application of time off Rules to time off Types
 - Enabling of time off self-management

The following business capabilities need to be in place to allow this capability to be of benefit:

- Defined rules and decisions on which exceptions employees can use.
- Confirmation from the business on the operating procedures of such exceptions.

The ability to set preferences relies on the underlying contract and shift configuration configured for each business unit, site, team, and employee.

Marked Time types representing lateness payback time need to be configured with the "Use to Mark Payback" option selected.

Exceptions to be used to define the lateness/early-departure itself must be configured in accordance with:

- Unpaid
- Partial Day
- Breaks-over-Exceptions are NOT allowed
- Agent Initiated selected with NO date range defined

With Shift Bidding the ability to create profiles relies on the underlying contract and shift configuration configured for each business unit, site, team, and employee.

Bidding is available for one-week schedules, allowing agents to select a group of shifts over a specified period.

The supervisor user role has the following access:

- WFM Policies > Contracts > Profiles
- WFM Configuration > Agents > Activities & Skills
- WFM Schedules > full access

Contract Profiles are created with the appropriate skill assigned to provide optimum coverage and relation to real agents.

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See [Supported Operating Environment Guide](#) for specific browser support.

Reporting

Real-time Reporting

The following figure shows the reporting flow:



Employee Engagement - WFM - Reporting

Approved and Authorised Staff

Agents

Supervisors

Forecasters

Schedulers

Can:
Generate
View
Schedule
Distribute
Export

In these report categories

Configuration

Forecast

Performance

Schedule

Adherence

Audit

 **Start**

 **End**

Approved, authorized staff can generate, schedule, and distribute out-of-the-box reports in the following categories:

- Configuration
- Forecast
- Performance
- Schedule
- Adherence
- Audit

The Genesys WFM product contains several out-of-the-box real-time reporting elements. Details can be found in the [Workforce Management Administrator Guide](#).

Historical Reporting

The Genesys WFM product contains several out of the box historical reporting elements. Details can be found in the [Workforce Management Administrator Guide](#).

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	<p>Digital</p> <ul style="list-style-type: none"> • Genesys Work and Lead Distribution (BO02) • Genesys Email Routing (CE16) • Genesys Chat Routing (CE18) • Genesys Social Media Routing (CE19) • Genesys SMS Routing (CE29) <p>Inbound</p>	None	None

All of the following required:	At least one of the following required:	Optional	Exceptions
	<ul style="list-style-type: none">• Genesys Call Routing (CE01)		

Document Version

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