Genesys Engage On-Premises Use Cases

Genesys Shrinkage Management (EE03) for Genesys Engage on premises

8/5/2025

> **Important**
>
> The PS material for this use case has not been finalized. Please contact your local CSD for effort estimates and scope details of this use case. This use case also supports PureConnect.

Improve operational effectiveness by better managing agent non-working time

What's the challenge?

Your contact center has many locations, time zones, and employees. Managing shrinkage with a spreadsheet based approach isn't working. Shrinkage is eroding the amount of time agents spend handling customer interactions which leads to increased operational expense, reduced service levels, and customer churn.

What's the solution?

Genesys WFM Solution improves forecast and schedule accuracy by including shrinkage in the plan. Schedule adherence, a primary cause of shrinkage, tracks variances between target and actual employee availability. With accurate workforce scheduling you can deliver higher service levels at lower operating costs.

Other offerings:

PureConnect

Contents

Use Case Overview

Story and Business Context

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

In Genesys WFM, the term *shrinkage* is synonymous with the term *overheads*.

Overheads are assigned to schedule state groups. A schedule state group a collection of schedule states linked to a site. Schedule states include breaks, meals, exceptions, time off instances and so on.

A **forecaster** uses shrinkage as an optional step in the forecasting process to pre-plan additional FTE requirements. For example, it is known that vacations & team meetings are going to take place and pre-planning for this to ensure it can go ahead without affecting service level goals.

Shrinkage is attached to a schedule state group, so actual, historical shrinkage achievement can easily be measured and applied to the configured overhead. This will increase the accuracy of future shrinkage planning because it can be based on accurate numbers.

A **scheduler** can use the *schedule state totals* screen in Genesys WFM to review the impact of shrinkage levels on service level performance and make changes to the day accordingly, like moving or cancelling team meetings or initiating an overtime process.

A **team leader** or **supervisor** may have a shrinkage KPI / MBO - they will want to be aware of how much and what types of shrinkage are occurring in their team. Armed with this information, they will be able to effectively manage their team's performance which will contribute to the overall performance of their business.

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 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 a decrease in time and costs associated with manual WFM efforts through the automatic updates of data, schedule shifts and database for skills and schedules
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

Summary

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 a variety of shrinkage management options.

Use Case Definition

Business Flow

The business flow described below requires the base setup of the system as described in the use case "Genesys Workforce Scheduling for Voice (EE01)".
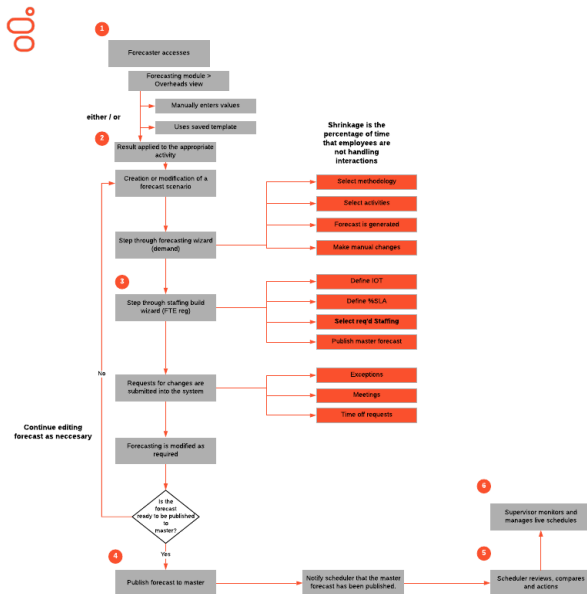
Business and Distribution Logic

Business Logic

n/a

Distribution Logic

n/a

Business Flow Description See the "EE1 - Optimize Agent Utilization for Voice Interactions" document for a general description of the forecasting flow. The additional steps below apply to shrinkage:

1. The forecaster accesses the overheads view within the forecasting module and makes a choice. Do they wish to:

   - use actual historical values via a saved template, or

   - manually enter projected values.

2. The forecaster then chooses the activity/ activities that the shrinkage values apply to.

3. The forecaster builds or modifies a staffing forecast using the *required staffing* wizard, comparing calculated and required FTE values where:

   - Calculated does not account for shrinkage

   - Required does account for shrinkage so FTE requirement will be higher

4. The forecaster decides to publish to master forecast as described in base package use case.

5. The scheduler reviews shrinkage running totals and makes adjustments to live schedule as necessary.

6. Team leaders monitor and manage live schedules.

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 Genesys WFM product contains a number of real time reporting elements. Details can be found in the Workforce Management Administrator Guide.

Historical Reporting

The Genesys WFM product contains a number of 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	**Workforce Engagement** • Genesys Workforce Scheduling for Voice (EE01) • Genesys Omnichannel Workforce Scheduling (EE02) • Genesys Back-office Scheduling (EE26)	None	None

General Assumptions

Assumptions for PureConnect customers running Genesys Workforce Management

PureConnect Platform Assumptions:

The dependency use case covers the PureConnect Platform-specific assumptions. Please be advised that Genesys Back office Scheduling (EE26) is currently not a dependency for this use case for PureConnect. The prerequisites for this use case on PureConnect are Genesys Workforce

Management for Voice (EE01) and Genesys Omnichannel Workforce Scheduling (EE02)

- PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

Other Assumptions

The customer has the requirement or desire to use this element of advanced WFM. The Inbound Voice use case is a pre-requisite of the base WFM package, including the definition of Queues, Stats, Agents & Skills. Because the WFM Web Supervisor uses Java, both JRE and Tomcat are requirements. See Supported Operating Environment Guide for specific versions.

Document Version

- Version **v 1.1.4** last updated **August 5, 2025**