

# Outsourcing Workforce Management: The Competitive Edge



# Introduction

In today's dynamic business landscape, agility is more than a buzzword – it's a fundamental requirement. As you learned in our other ebook "What is WFM: Harnessing it's Power," efficient Workforce Management (WFM) is key in ensuring that your organization doesn't just respond, but proactively adapts to the ever-evolving demands of the market. Outsourcing WFM can be the transformative decision that streamlines your operations, optimizes your resources, and catapults you ahead of competitors.

## Chapter 1: Forecasting – Predicting Tomorrow, Today

Forecasting is fundamental! Yes, while the concept might seem straightforward, the intricacies of accurate forecasting are profound, more so for those new to the landscape of Workforce Management. From understanding historical patterns to predicting future anomalies, forecasting ensures that businesses are always on the right foot, ready to leap into opportunities and pivot away from pitfalls.

### **Why forecasting matters:**

Are you exhausted with the constant "I don't know" answers when it comes to why the business yet again missed something that is normal in your industry or should have been anticipated? Forecasts set the tone for accurate staffing, budgetary allocations, and delivering consistent employee and customer experience. While yes, most WFM tools will do this function for you the tool is only going to be as good as the information you give it.

Forecasting is more than just giving the WFM tool data it's about MATH, recognizing patterns in your DATA (which means you have to be constantly looking at the data), and adjusting your forecast based on what's happening in the business. It's NOT a set it and forget it function. Forecasting requires consistent analyzing & "tuning."

## The perils of imprecise forecasting:

Because newbies or undertrained WFM professionals believe they can rely solely on the WFM tool to do the work many times their forecast are way off resulting in misaligned resources, inflated costs, and tarnished brand reputations.

These are common mistakes newbies make to look out for when it comes to forecasting:

- **Lack of Data:** Again, even if you are using a WFM solution TRASH IN EQUALS TRASH OUT. Your data integrity and analysis matters! Bad data is the root of bad forecast.
- **Ignoring External Factors:** As I covered in “what is WFM” ebook you MUST work with other teams and have a way to consider other departments that will impact the traffic you are forecasting for.
- **Not accounting for seasonality:** Every business has unique seasonality factors that should be considered. Not accounting for seasonality will skew your forecast and have trickle down impacts to your scheduling.
- **Neglecting continuous review:** Your forecast are living and breathing as you get more historical data you should be continuously reviewing the data and making updates to your forecast methodology. THIS is an art because many times you are working within a “lock in” period which means you need to also then work with the Scheduling & RTA team to see how updates to forecast will impact their workstream. Again, this requires seasoned forecasters.
- **One queue fit all approach:** Generally speaking, in organizations there are multiple queue types that have distinct characteristics. Just like your children all have different personalities and require something different from you as a parent, so does work queues when it comes to forecasting. I’m not suggesting that the forecasting process or methodology change. Instead, what I’m pointing out is that from our experience looking at the queue and it’s individual traits such as AHT, Shrinkage, Occupancy, etc are going to be crucial. Those traits could be completely different from a service vs sales queue and need to be considered accordingly.

## Partnering with the best:

Solid Rock Consulting’s deep industry insight offers more than textbook solutions; it offers a vision into the future. Envision an organization where every resource is judiciously allocated, budgets are seamlessly managed, and every customer interaction strengthens your brand reputation. At Solid Rock Consulting, we don’t just offer a service, we provide a transformative experience.

# Chapter 2: Scheduling – Where Strategy Meets Execution

Behind every smoothly running organization is the hidden art of scheduling. Often perceived merely as a logistical necessity, scheduling is a strategic endeavor that weaves the intricate fabric of daily operations. For businesses aiming to elevate their service delivery, customer satisfaction, and employee experience, mastering the subtleties of scheduling is imperative.

## The art of scheduling:

One of the most epic pit falls surrounding scheduling is static scheduling. This is generally done because (1) “it was always done that way.” Many times, individuals will cite the organization’s hours of operations as the reason why they offer limited schedules or (2) because it’s simply too much work for the operations or scheduling individual to handle the activities that come with offering more variety. Transcend beyond mere shift allocation to strategic workforce planning. Neither of these reasons should be what’s stopping you from offering more dynamic schedules and if it is it’s costing you more than you know I can assure you.

First and foremost, before customizing, you must understand your scheduling ideation process shouldn’t be left to static “hours of operations” scheduling. Your schedules at minimum should be (1) Volume based and (2) Skills based which would require that you review your day of week and daily call arrival pattern to create shift templates. THIS will serve as your scheduling baseline as to what schedules your very specific organization needs.

These are common mistakes newbies make to look out for when it comes to scheduling:

- **Not offering dynamic schedules:** creating dynamic schedules not only ensures the business is appropriately staff accounting for over and understaffing but also contributes in many cases to happy employees driving a employee satisfaction scores through the roof.
- **Neglecting employee schedule preferences:** Ignoring the preferences and availability of employees can result in decreased morale, increased absenteeism, and higher turnover rates.
- **Not leveraging multi skilled employees:** Not cross-training staff can limit scheduling flexibility, especially during times when a specific skill set is in high demand.
- **Ignoring legal and contractual obligations:** Overlooking labor laws, union agreements, or contractual obligations when scheduling can result in legal repercussions and employee grievances.

In the dynamic world of call center operations, where every moment counts, scheduling is the corner stone that holds everything together. It’s the art and science of turning plans into daily realities, of ensuring that every resource, every hour, is optimized for success. With a robust approach to scheduling, the symphony of daily operations plays out seamlessly, leading to consistent business success.

# Chapter 3: Intraday Management – Pivoting with Precision

The real challenge starts once the day's operations commence. Real-time Intraday Management is like a skilled navigator guiding a ship through unforeseen storms and changing currents, ensuring the journey remains on course. For businesses, it's about maintaining equilibrium in real-time, adjusting to unanticipated deviations, and making certain every move counts towards achieving daily goals.

The pivot of precision: Real-time management isn't about mere reaction; it's proactive prediction. This means continuously monitoring operations and anticipating the need for adjustments before they escalate into significant disruptions. Often, organizations fall prey to a reactive approach, always chasing the curve. This not only stresses resources but can also jeopardize the delivery of a consistent customer experience. Proactive intraday adjustments, on the other hand, allow an organization to maintain its service level commitments, employee satisfaction, and operational stability.

It's crucial to understand that real-time doesn't equate to instantaneous, but it does require agility. The goal is to adjust resources effectively and efficiently based on real-time data and insights.

Here are common pitfalls newbies often encounter in Real-time Intraday Management:

- **Overcorrection:** Making drastic changes in response to minor fluctuations can destabilize the operational rhythm, leading to more harm than good.
- **Underestimation of Impact:** Not grasping the ripple effect of one change can lead to cascading challenges across the operations.
- **Slow Response:** Taking too much time to recognize and respond to an emerging trend can result in missed service levels and stressed resources.
- **Incomplete Data Analysis:** Relying solely on one data point without considering the whole picture can lead to misguided decisions.
- **Failure to Collaborate:** Not maintaining open communication with other teams can result in siloed decisions that might not be in the organization's best interest.

In today's CX everything environment, the real-time intraday manager is the unsung hero, making agile decisions behind the scenes. The dance of intraday management is one of agility, foresight, and precision. And as the operational day unfolds, it's this dance that ensures the organization not only meets but exceeds its set benchmarks, crafting success stories one decision at a time.

# Chapter 4: Why Outsourcing WFM is a Game Changer

Stepping into the bustling world of Workforce Management, businesses often find themselves at a crossroads. The puzzle of WFM, intricate and ever-evolving, demands a level of expertise that not every organization possesses in-house. This is where the transformative power of outsourcing steps in, shifting paradigms and revolutionizing traditional operational strategies.

Unlocking core potentials: Every enterprise is a master in its domain. Keep the main thing the main thing! By outsourcing WFM, organizations get the luxury of zeroing in on their core competencies, ensuring they deliver unparalleled value in what they do best, while the experts meticulously orchestrate their workforce dynamics.

Here are some of the top reasons we have found that customers outsource their WFM operations to us:

- 1. Expertise and Specialization:** Outsourcing to WFM specialists ensures access to expertise, best practices, and the latest technologies without having to invest in developing these capabilities in-house.
- 2. Cost Savings:** Outsourcing can offer significant cost reductions by eliminating the need for recruiting, training, and maintaining an internal WFM team, as well as flexibility.
- 3. Scalability:** Outsourcing offers the flexibility to scale WFM operations up or down based on business needs, without the long-term commitment of hiring or laying off internal staff.
- 4. Focus on Core Competencies:** Outsourcing non-core functions like WFM allows organizations to concentrate on their primary business activities and strategic initiatives.
- 5. Continuous Improvement:** Many outsourced WFM providers operate on a continuous improvement model, regularly refining processes and strategies to ensure optimal performance.
- 6. Strategic Partnership:** Some businesses view WFM outsourcing as an opportunity to build strategic partnerships that can lead to collaborative innovations and long-term growth.

In essence, while the reasons might vary based on the specific needs and strategic goals of an organization, outsourcing WFM often boils down to achieving greater efficiency, flexibility, and value while mitigating risks and costs.

# Chapter 5: Solid Rock Consulting – Your Trusted WFM Partner

At Solid Rock Consulting, we are your reliable allies in navigating the complex landscape of Workforce Management (WFM). Known as 'The WFM People,' we are an embodiment of expertise, innovation, and passion, dedicated to empowering small to medium-sized enterprises to optimize their workforce and achieve unparalleled growth.

Our team, a robust blend of seasoned WFM consultants, are the heart and soul of our operations. With an impressive array of industry experience, they bring a deep understanding of the latest methodologies, best practices, and the changing business dynamics. We stand by your side throughout your WFM journey, offering insights, strategies, tech implementation, process optimization, and done for you WFM managed services.

At Solid Rock Consulting, we don't just provide services - we build relationships. We pride ourselves on our ability to understand your needs and craft solutions that are not just effective, but innovative and forward-thinking. We stand firm on our belief that every business, regardless of its size, deserves the benefits of efficient workforce management. With us, you're not just surviving in the fast-paced business world - you're thriving.

Ready to unlock your true business potential?

Connect a Solid Rock Consulting, the WFM People, and together, let's set sail on the journey towards workforce management excellence.

## Conclusion: The Future of Workforce Management

Navigating the complexities of the current business environment requires foresight, strategic planning, and real-time adaptability. Outsourcing your WFM to trusted partners like Solid Rock Consulting ensures you're well-equipped for today's challenges and tomorrow's opportunities.

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Established with a clear vision to streamline business operations, we specialize in providing comprehensive and tailor-made WFM Training, Managed Services, and Consulting that address your unique challenges. Our drive lies in fostering productivity, trimming costs, ensuring customer satisfaction, and charting a course for your business towards the pinnacle of success.

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**Speak with the team today!**

