

What You Need to Know about Workplace Flexibility

VERINT[®]



Creating a Flexible Workplace

Employees, customers and businesses today all demand flexibility:

- Employees want flexibility for better work-life balance.
- Customers want the flexibility to interact with businesses in any channel, at any time.
- Businesses want the flexibility to ask employees to work across channels and functions to meet customer demand as cost effectively as possible.

But creating workplace flexibility can be hard. For example, how do you give employees flexible scheduling options? Can they easily change their schedules, even when they're not in the office? How can you staff efficiently to serve customers across different channels? Can you share employees across channels and functions?

Workforce management software can help you do this. It can account for the differences in channels and business functions, so you can extend workforce management across your organization.

Let's see how.

What is Workforce Management?

Workforce management (WFM) solutions help organizations make the best use of their employees, so they can be more efficient and productive. How? Here are the key ways:

1

Forecasting Demand

WFM solutions create a demand forecast that looks at previous actions and projected actions across all channels.

2

Calculating Staffing Needed

Using the forecast, WFM solutions create staffing requirements by estimating the number of people needed to handle the demand and reach service-level goals.

3

Scheduling Employees

Scheduling matches the workload with employee skills and availability. The software must account for specific shifts, scheduling preferences, and labor laws.

4

Adjusting the Schedule

WFM systems compare forecasted demand with actual demand, and the published schedules to what employees are actually doing. By seeing the differences, managers can make schedule adjustments throughout the day.

Workforce management is available as an on-premises or cloud solution. But choose your solution carefully. Many cloud versions don't offer all the features and capabilities of the on-premises types.



WFM in Action

Jessica is a contact center agent for Orbital Bank. She's supposed to go online in 30 minutes, but she's having issues with her car and needs to adjust her shift for a later start.

She grabs her phone and checks her schedule on her mobile WFM app. If she could come in 30 minutes later this morning, she can make up that time tomorrow afternoon. Jessica submits the request and gets an immediate response. She's able to make up the time with no problem.

A Responsive, Omni-Channel Contact Center

Today's contact center agents expect more: more tools, more options, and more flexibility around when, where, and how long they work. How do you balance the needs of employees with those of customers and the business?

Luckily, today's modern WFM solutions make it easy to build schedules that factor in many requirements. They can simplify and automate processes, such as shift bidding and swapping, managing time off requests, and following labor laws.



Here are some examples of how WFM solutions can give employees flexibility without harming service:



Mobile WFM

By providing employees with mobile access to their schedules and alerts, WFM can help them better balance their home and work life. Companies can alert employees to pick up shifts, overtime, and voluntarily give shifts or part of shifts back in real time, enabling them to respond to demand more efficiently.



Scheduling across Channels and Media

Customers today use three to six different channels to interact with an organization. Modern WFM systems need to factor in the different work types, handle times, service levels, and skills and proficiencies of each agent to effectively staff each channel.



Simple, Modern User Interface

There are a LOT of factors that go into effectively staffing a contact center. WFM solutions can make it much easier to keep track of them by providing an easy-to-use interface that shows everything on a single screen. It's easier to create and compare schedules—and to adjust them for multiple employees.



DISCOVER HOW U-HAUL IS USING VERINT® MOBILE WORK VIEW™ TO BE MORE EFFICIENT AND RESPONSIVE TO CUSTOMERS. **WATCH THE VIDEO**

A Cost-Effective Back-Office Operations

Back-office leaders are in charge of executing the goods and service requests of customers. They are always under pressure to improve efficiency while keeping customers and employees happy.

It's not easy. The back office may handle hundreds, even thousands of different types of work. There are complex processes to follow and—unlike contact centers—deadline goals are measured in days, weeks, or months. And there's usually a backlog of work that needs to be tracked against a deadline.

WFM solutions can help back offices use their resources better. They work with typical back-office systems, such as business process management and work allocation systems. Using information from these solutions, they can create staffing plans showing how many skilled resources are needed—and when—to work on specific types of tasks. They can also provide the workplace flexibility needed to attract and retain the best talent.



WFM in Action

Jane is an experienced claims processor at a property and casualty insurer. Until now, she's been comfortable with her 8 a.m. – 5 p.m., five-day work week. But Jane's mother needs dialysis treatments twice a week, and Jane is her ride.

Jane worries about using personal time to cover her absences. Luckily, her employer offers her flex time, so she can work from home at a time that fits her new schedule. She's happy because she can balance work with her personal life. Her employer is happy to keep a great worker—and can send work to Jane that might otherwise have required overtime to complete.



Here are some ways that WFM solutions can help back-office operations:



Activity-Based Scheduling

The back office focuses on work arrival, volumes, and deadlines. Employees are scheduled in blocks of time to handle specific activities. Back-office WFM solutions create employee schedules by prioritizing work types, backlogs, service goal deadlines, and employee availability and skills. They help organizations better balance workloads and avoid overstaffing, understaffing, and overtime.



Backlog and Aging

Back-office WFM systems account for the volume and age of work in the backlog to prioritize how resources spend their time. This helps prevent the cost of unneeded overtime and service delivery failures.



Work Item Tracking and Predictive Analytics

Managers need to track each work item to be sure employees do the right work at the right time. Back-office WFM solutions provide this ability, so managers can better predict which work items will (or won't) be completed on time and reprioritize those that may be at risk of missing their service goals. This is key for meeting customer expectations consistently and improving customer satisfaction.



SEE HOW GUARDIAN LIFE USES VERINT WORKFORCE MANAGEMENT™ IN ITS BACK OFFICE TO INCREASE CAPACITY AND REDUCE OVERTIME. **WATCH THE VIDEO**



WFM in Action

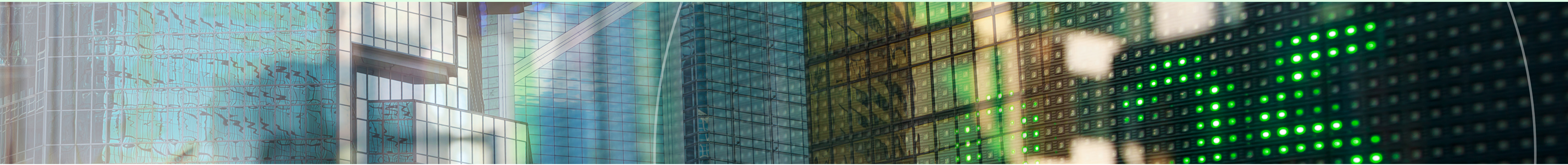
Greg is a branch manager at a regional bank. He struggled to consistently deliver monthly schedules for his branch associates three weeks in advance, as directed by the bank. As a result, his branch was sometimes understaffed or overstaffed at certain times of the day.

Now, with an automated branch WFM solution, Greg regularly delivers schedules to his associates on time each month. He's not only creating employee engagement, but also managing the float pool and time-off requests with more flexibility and efficiency.

A Convenient, Helpful Service Branch

More and more customers are using digital channels to handle routine transactions. So when a customer does visit a financial institution, it's important to make the branch experience exceptional.

Banks are introducing new technologies, changing the roles of their staff, and redoing the "look and feel" of their branches. Workforce management solutions help by providing employees with the flexibility to deliver great service—not only in terms of when they work, but also where—and what services they provide.



Branch operations can benefit from WFM solutions in a variety of ways:



Labor Modeling and Position Planning

With WFM solutions, banks can accurately predict customer demand and schedule staff to meet the needs of markets and branches. This might include scheduling universal bankers to handle both service and sales, staff pools to manage peak demand and planned vacancies, and roaming resources to deliver specific services, such as mortgage and wealth specialists.



Automated, Flexible, and Compliant Staff Schedules

WFM solutions support branch planning and scheduling by providing automation to improve operational efficiency, flexibility to increase employee engagement, and schedules that comply with regulations and company policies.



Mobile Scheduling for an Engaged Workforce

WFM solutions offer mobile scheduling, which can help branch associates better balance their work and home life. They can check their work schedules, set shift preferences, request time off, or swap shifts using their mobile devices. Branch managers can handle shift coverage, prevent double-booking employees, and avoid unplanned overtime costs—even if they're not physically in the branch. It's easy to view associate requests, approve or decline them, and encourage collaboration.



LEARN HOW FIRST HORIZON BANK REDUCED STAFF OVERTIME BY 80 PERCENT WHILE MAINTAINING STAFFING LEVELS AND IMPROVING CUSTOMER SATISFACTION. **READ THE CASE STUDY**

Workforce Management Enables Workplace Flexibility

To provide the workplace flexibility employees, customers and your business requires, you need an enterprise workforce management solution that can grow along with your business. Look for a modern WFM tool with features designed specifically for contact centers, back-office, and branch operations.

[Verint Workforce Management](#) is exactly that kind of WFM solution. It's part of Verint's patent-protected portfolio of cloud and on-premises solutions for simplifying, modernizing, and automating customer engagement. Contact us to learn more or visit www.verint.com/wfm.

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