

Agent Preferences v Shift Bidding – Which to Choose? asks Teleopti

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How can resource planners achieve the best balance between agents' wishes for their schedules and the forecasted needs of the contact center? Rebecca Philp at Teleopti, weighs up the two options on offer

As the contact-center world moves further and further into an omni-channel environment, the option to automate agent shift preferences is growing, replacing the older bidding systems based on manual scheduling. The question one must ask is: Why is this change occurring? To answer such a query, I will first look at the limitations in sticking to shift bids, and then explore the possibilities on offer with introducing a system that automatically optimizes schedules to agent preferences.

Shift bidding: The potential problems

With Shift bidding, contact centers can release the schedule of shifts on offer and agents can then bid for the shifts that they want, entering how much they would like to be paid for working those hours. At the end of the process, shifts are awarded, typically to those with the lowest bids (and the highest KPIs). While the process is good for initiating agents' involvement in building their schedules there are a few issues that will crop up time and time again:

- Time consuming (with often little end improvement)

Using shift bids takes weeks upon weeks to execute, and in most cases, the schedules created are very similar to the ones that were in place before the bid. A lot of work for little gain

- Fixed and ill-fitting

Shift bids fail to account for the constantly changing landscape of contact-volume forecasts and, once a shift bid ends, it can cause the contact center to be locked into a set of schedules that allow for almost no flexibility, a problem for both the agent and the center. If a shift bid is designed around the first week in September, how does that solve scheduling issues in the third week of November? Equally, a locked-in schedule won't work for many agents as they often work in contact centers as a second job, wanting the flexibility to fit shifts around other things in their life

- Stress for agents

Agents care first and foremost about their schedules and getting the right number of hours at the times that work best for them. If management is making them worry about their livelihood, then this will cause them to lose focus on the job that they are employed to do

- Overtime expenses

Just as the "best" shifts will end up with the lowest pay per hour, the "overtime" or unpopular shift times will have to be filled by paying agents at a much higher cost, causing payroll costs to rise. Furthermore, those agents who have to work the less favorable hours, might be being paid more but a "bad schedule" could leave them feeling tired and de-motivated. In the long run, if agents are

performing poorly, the company won't reach its service level targets.

Agent Preferences: The strengths

Agent Preferences is an automated system that lets agents enter their preferences for shifts and days off for each day of the week of the upcoming scheduled period by choosing the desired shift category (eg. early, daytime, late) or day off. There is no monetary bidding involved but agent-rank tiers can be brought in to determine what percentage of preferences agents receive in their schedule eg. 80% for third tier agents and 100% for top tier agents. Using this option, there are multiple benefits on offer:

- Flexibility

Firstly, while traditional shift bidding requires contact centers to undergo a bidding process only several times a year – taking weeks to complete each time – an ongoing agent preference system gives agents the freedom to continually request desired scheduling. Imagine being able to enact “mini-bids” every week, without any extra effort. Each mini-bid is specifically targeted to that week's forecast Secondly, an automated Agent Preferences tool is responsive to the growth and evolution of the customer-service industry, rather than restraining it. While the cumbersome process of shift bidding makes it easier to only work with single-skilled agent groups, Agent Preference offers an easier, ongoing process that can work for multi-skilled, multi-channel contact centers.

- Control

The system also allows users to define metrics and weighted measures for ranking agents, typically by using performance metrics from built-in gamification features or from quality scores, or a combination of both. This process will guarantee that the highest performing agents will get most of their preferences awarded.

In addition, resource planners can set business (service level) requirements so that the company's customer-service needs are never overlooked.

- Motivation and empowerment for agents

Motivation - the frequency of “mini-bids” with this Agent Preferences system means that agents no longer need to feel locked-down or de-motivated by shifts that are set for months on end. Instead, having this strategy of frequent preference iterations ultimately motivates agents to think: “If I'm a top performer, I need to maintain that level if I want to keep my shift-preference rank. But, if my performance is poorer, I don't need to be too upset since I'm not trapped in this schedule for the next few months. I can work towards a better shift in just a few weeks.”

Empowerment - in keeping with Teleopti's own focus on agent engagement and empowerment, Agent Preferences (through a self-service portal) allows agent input on how and when they'd prefer to work. When scheduling time rolls around, the intelligent optimization engine kicks in and balances business needs with agent preferences.

- Fairness

As I said in my previous point, this fairness is found in regular 'mini-bids' and realistically balancing agent wishes with forecasts. Equally, unlike shift bidding, it doesn't favor those that can afford to work at a lower cost per hour.

The closing balance

At the end of the day, Agent Preferences is an automated system that Teleopti offers and believes in, yet for a single-skilled contact center looking to set schedules for months at a time, sticking to shift bidding is perhaps the optimal option. However, for a multi-channel contact center working with multi-skilled agents, constantly adapting to consumer needs whilst satisfying employees, Agent Preferences seems, at least to me, to be the best way forward.

Rebecca Philp is Product Knowledge Manager at Teleopti

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About Teleopti

Teleopti, a top, global provider of workforce management software, offers a world-class WFM solution that is sophisticated, localized and easy to use. As the largest "best-of-breed" vendor, Teleopti focuses on helping contact centers, back offices and retail stores improve customer service, employee satisfaction and profitability – through optimized, automated forecasting and scheduling with cutting-edge features to empower and engage employees.

Founded in 1992, Swedish-established Teleopti has customers in over 85 countries, offices in Sweden, United States of America, Canada, United Kingdom, Russia, United Arab Emirates, China, Germany, Brazil, South Africa, the Philippines, Finland and Norway – and a comprehensive global network of partners. With a record of continuous net profitability for 25 years and with high customer satisfaction ratings, Teleopti serves as a reliable partner.

For more information, visit TELEOPTI (<http://www.teleopti.com>)

Press contact: Mary Phillips/Andreina West:

PR Artistry Limited

T: +44 (0)1491 845553

E: mary@pra-ltd.co.uk