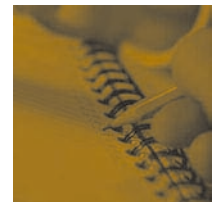
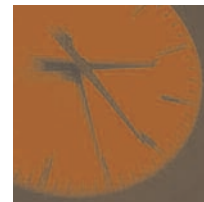


# taction®

## THE CONTACT CENTER

## Scheduling to Meet Goals and Satisfy Agents

By Trevor Readinger



**F**or most call centers, there's a delicate balance between meeting service level and efficiency goals and ensuring that employees are satisfied with their schedules. As an outsourced call center, Taction has obligations to its clients to meet specific service levels. We must also run the call center in a profitable manner. Meeting client obligations and maintaining profitability are our first scheduling goals. Our second scheduling goal is maximizing employee satisfaction.

In twenty-three years of operation, Taction's scheduling policy has changed with technology, new clients, and staff. It shares many of the attributes of successful scheduling policies at other companies. Consider that a scheduling policy should:

### **Have buy-in from everyone affected:**

The people who carry out the policy must understand it and support it. The folks in Human Resources have to hire according to it. Team Leaders need to be able to answer agents' questions and help them work within the policy. The scheduler needs to create schedules while managing employee information and special requests.

### **Be easy to follow:**

A scheduling policy should be easy for the scheduler and employees to follow. One way to do that is to put good tools in place. Years ago, Taction used manual spreadsheets which had to be retooled every time small things changed. Later, we shopped for and chose workforce management software that made life much easier for our scheduler. Keep in mind any

limitations of the scheduling software. For instance, you might not want to offer rotating weekends if your workforce management system doesn't include that option.

### **Support the company's values:**

If lifelong learning is one of your company's values, your scheduling policy should be flexible when it comes to allowing agents to pursue everything from college classes to continuing education. If community service is a strong value, schedules should include room for agents to volunteer on a regular basis or get involved with company initiatives.

### **Support the company's goals:**

Your policy might reward agents who meet certain goals. Performance-based initiatives can include making the fewest errors, having perfect attendance, or generating the most revenue via selling, up-selling, cross-selling, or selling a spotlighted item. It may be a tenure-based policy that lets agents who have worked at the company longest get first pick of the available fixed schedules.

### **Give agents tools to change their own schedules:**

At Taction, agents have the option of shift swapping, which they do via company email or by word of mouth. They also can request time off in advance. Because Taction meets contractual service levels, we tend to overstaff slightly rather than staff exactly to our forecast. To help amend this and to

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## Scheduling to Meet Goals and Satisfy Agents

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give employees yet another tool to manage their own schedules, we have a “Go Home Early” list. Agents may add their names to the list if they wish to, and if the call center slows down, the list is executed to reduce staff in a way that will increase employee satisfaction whenever possible. It also means that the call center is adequately staffed, not overstaffed, thus helping us maintain profitability.

### Be posted at a clearly defined time:

Finding the right posting horizon can be tricky. The shorter the horizon, the more closely aligned the schedule will be with the forecast, but the less warning agents will get about their schedules. Conversely, a long horizon may give agents a heads-up on their schedule, but it also means it's less likely to meet the forecast. The forecast accuracy/time frame should help ensure that business objectives are being met. Employee feedback can help determine if schedules are being posted at an adequate horizon.

Posting schedules in advance is a key ingredient to employee satisfaction. Just as agents expect to be paid regularly, they expect to see their schedules posted at a set time. We post a week in advance. The schedule is posted at the end of the week for the start of the second week following.

Once your scheduling policy is in place, you must ensure that those affected by it have been educated about it, that the policy is applied consistently and fairly, and that there is

flexibility in the policy to handle unforeseen circumstances. So, once the policy is in place, things to consider include:

### Education:

The policy must be well documented and it must be easily accessible to everyone in the organization. Policies can be spelled out in more than once place: employee handbooks, which are given to every new agent; on the company intranet, if there is one; and tacked to a notice board in a common area, such as the break room or cafeteria.

New hires should get a written copy of the scheduling policy, perhaps in their employee handbooks, and they should also have access to someone who can answer their questions. Our scheduler meets with every training class to tell them about the policy and to answer questions and address expectations ahead of time. There should be no surprises for employees when they see the first schedule go up or when they first ask for time off.

### Consistent and fairness of application:

Consistency is a critical element of a scheduling policy. The policy must be applied to all agents consistently and fairly. Making exceptions to the rule – in how the policy is applied or to whom it is applied – should be very carefully considered. Special treatment undermines the morale of others.

Post the schedule at a consistent time and in a predetermined place that employees can depend on – in their email, on a bulletin board, in their folder at their Team Leader's desk, and so on. This allows agents to arrange their lives outside of work in a more satisfactory manner.

### Flexibility:

In the end, the scheduling policy is a guideline; there will be exceptions. Sometimes doing the “right” thing means ditching the policy. If an agent's spouse or child or parent becomes critically ill, that agent's ability to meet the schedule falls by the wayside. Obviously, it's important to have a backup system in place for these events. A first line of defense is to send all agents an email asking if any of them wish to volunteer to fill the suddenly empty shift.

Your scheduling policy probably won't be quite like any other call center's scheduling policy. What works for your agents may not work for someone else's. But a few key ingredients will help you schedule smoothly: buy-in from those affected, ease of use, support of the company's values and goals, ways to empower agents to change their own schedules, a set posting horizon, consistent and fair implementation, and flexibility when it's called for. ☛

*Trevor Readinger is the operations manager at Taction. Taction ([www.taction.com](http://www.taction.com)) is a contact center that takes orders and literature requests, up-sells and cross-sells, answers FAQs, and performs telesales for DTC and B2B clients. Trevor Readinger can be reached at [trevor.readinger@taction.com](mailto:trevor.readinger@taction.com).*

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