

Best Practice Capacity Planning in Call and Contact Centres

ICTCC670A Forecast and
plan using call traffic
information analysis



COURSE OUTLINE AND FEES

Developed and Delivered By:

*Intellect Consulting Services Pty Ltd
Registered Training Organisation ID 5015
PO Box 193 Gosford, NSW 2250 AUSTRALIA
Phone +61 2 4340 1670 Facsimile +61 2 4340 1425
E-mail: ics@intellect-cs.com
www.intellect-cs.com*



Best-Practice Forecasting and Scheduling in Call and Contact Centres

The program outline is below and represents 2 full days plus an optional third day of training plus pre-work and an optional assessment.

Session	Topic(s)	Outcomes
Session 1 <i>Day 1 morning</i>	<ul style="list-style-type: none">▪ Program overview and roadmap▪ Understanding the unique nature of inbound call centre environments▪ Determining the right service level for your call centre▪ Fundamentals of forecasting and best practice call centre forecasting methods▪ Determining how much and what data to use in developing forecasts	<ul style="list-style-type: none">▪ Understand the operating characteristics of the inbound call centre▪ Point out and explain critical call centre phenomena▪ Understand the interdependent nature of call centre activities▪ Evaluate your service level methodologies▪ Develop a process to ensure service levels are appropriate for the business▪ Understand the basic principles in forecasting
Session 2 <i>Day 1 afternoon</i>	<ul style="list-style-type: none">▪ Queuing theory▪ Erlang C▪ Assumptions and adjustments▪ Why Erlang C by itself won't work▪ Shrinkage: accounting for absenteeism, leave, training, etc.	<ul style="list-style-type: none">▪ Describe the impact of adherence on service level and occupancy▪ Understand why Erlang C is the fundamental driver of scheduling staff▪ Adjust Erlang C calculations to account for shrinkage and other factors▪ Calculating the right shrinkage factor for your centre
Daily Wrap-Up	<ul style="list-style-type: none">▪ Review of Day 1 material	<ul style="list-style-type: none">▪ Day 1 Assessment



Session	Topic(s)	Outcomes
Session 3 <i>Day 2 morning</i>	<ul style="list-style-type: none"> ▪ Review of Day 1 ▪ Case Study: Forecasting and Scheduling case study using actual call centre data ▪ Participants work through a structured case study utilising the principles covered in Day 1 for establishing a forecast and scheduling staff against the forecast so that service level is attained and the workforce is optimised. 	<ul style="list-style-type: none"> ▪ Build a contact traffic forecast that accounts for business fluctuations ▪ Apply the principles in forecasting ▪ Demonstrate knowledge in forecasting and scheduling principles ▪ Establish clear interdependencies that impact forecasts and service level
Session 4 <i>Day 2 afternoon</i>	<ul style="list-style-type: none"> ▪ Forecasting contact traffic without historical data ▪ Managing the impact of other departments ▪ Managing the staff morale issues of rostering ▪ Data presentation principles ▪ Cost-justifications for staff and resource budgets and building business cases 	<ul style="list-style-type: none"> ▪ Integrate the 'human factors' into to scheduling and forecasting ▪ Develop effective strategies for improving staff retention and morale during sustained periods of poor service level ▪ Develop data presentation templates for various audiences ▪ Determine cost of queues, poor service level and ineffective call handling ▪ Basic cost-benefit analysis ▪ Present improved reporting formats
Program Wrap-up	<ul style="list-style-type: none"> ▪ Review of Day 2 and overall program ▪ Overall Assessment ▪ Administer optional assignment(s) 	<ul style="list-style-type: none"> ▪ Demonstrate practical application of the principles of forecasting and scheduling



Optional Extender Workshops: Real Time Queue Management Techniques and Capacity Planning Implementation

The program outline is below and represents either ½ or 1 full day depending upon selections. ICS is happy to amend the program if required.

Session	Topic(s)	Outcomes
Session 5: Real-Time Queue Management Techniques <i>Day 3 morning</i>	<ul style="list-style-type: none">▪ Review of key practical aspects of capacity planning as they relate to floor management▪ Differentiating between real-time queue data, near-real time data and other historical data▪ How to preventing most queue spikes▪ Relationship between RTQM, floor management and coaching plans▪ Applying effective management techniques to real-time operations	<ul style="list-style-type: none">▪ Identifying what drives queue spikes▪ Establish a consistent approach to managing call queues through development of a RTQM process▪ Develop a queue escalation plan▪ Communicate and implement the plan within each team and centre-wide▪ Apply rostering techniques to ensure service level attainment while balancing agent empowerment
Session 6: Implementing Centre- Wide Capacity Planning <i>Day 3 afternoon</i>	<ul style="list-style-type: none">▪ Drivers of key performance outcomes within the inbound environment▪ Relationships to and impact upon team leader and manager roles▪ Floor management tools for the inbound contact centre environment▪ Practical and innovative rostering techniques that support an empowered workforce	<ul style="list-style-type: none">▪ Identify and apply Team Leader and manager activities that support overall call centre purpose and business objectives▪ Develop communication tools and learning activities to help agents understand the inbound environment and their individual influences on overall centre performance▪ Integrate a range of effective initiatives to build service level attainment



Program Delivery

ICS recommends that the above program be delivered over 2 or 3 consecutive or non-consecutive full days (e.g., 8.30 AM – 4.30 PM each day).

ICS will provide the following:

- Provision of complete workbooks contained in 3-ring-binders for each participant in the program;
- All course notes, handouts, knowledge and skills assessments and any other material provided in the course of program delivery;
- Supply of learning aids and training tools such as textas, flip-chart markers, blu-tac, activity cards, etc.
- Provision of a qualified ICS trainer for the above program and for each of the designated training dates;
- Certificate of participation for all participants completing the above program; and
- Statement of Attainment in the corresponding national competence in the ICT60102 Advanced Diploma of Customer Contact Management for each participant undertaking, and successfully completing, the optional assessments.

Fees and Terms

Program	Fee (\$)
Capacity Planning (2 days) <i>Comprehensive course and reference materials for a minimum of 6 people including resource planners, resource administrators, team leaders and manager(s), and course delivery on agreed dates</i>	\$2150 per person
Optional RTQM and Implementation Workshop (1 day) <i>Comprehensive course and reference materials for a minimum of 6 people including resource planners, resource administrators, team leaders and manager(s), and course delivery on agreed dates. Only available in conjunction with the above 2-day course.</i>	\$850 per person
National Competence Standards Assessment <i>Provision of accredited assessor for each item of the assigned work that complies with the ICT60102 Adv Dip CCM national competence standards (ICTCC670A Forecast and plan using call traffic information analysis); marked assessments with feedback; Statement of Attainment for successful completion of the assigned work; and return of assessed materials.</i>	\$450 per person



Best-Practice Capacity Planning Registration/Enrolment

To register your interest in enrolling in the above program, please fax back this completed form to:

Intellect Consulting Services Pty Ltd
ATTN: Corporate Programs Manager
PO Box 193, Gosford NSW 2250 Fax: 02 4340 1425

E-mail: ics@intellect-cs.com

Enquiries, please call: 02 4340 1670

Please copy for each individual enrolling.

- I wish to enrol in the **2-day** Best-Practice Capacity Planning
- I wish to enrol in the **3-day** Best-Practice Capacity Planning
- I would like further information on the Advanced Diploma of Customer Contact Management.

Name: _____

Company & Work Title _____

Postal Address _____

City/State/Postal Code _____

Daytime Phone () _____ Fax () _____

Mobile Phone _____

Email address _____

PAYMENT DETAILS: Please choose one option. Payment must accompany your enrolment.

Please charge my: (circle one) Bankcard / MasterCard / Visa / Amex for \$ _____ incl. GST

Cardholder's Name: _____ Expiry Date: _____

Card #: _____

Cardholder Signature: _____

We enclose/will post (circle one) a cheque for \$ _____ AUD to Intellect Consulting Services

Purchase order# _____ . An invoice will be raised upon receipt of enrolment.

Thank you for your enrolment



Appendix A: Consultant and Trainer Resumes

Johanna Hetherington, Chief Executive Officer

Johanna's experience spans over a decade in management consulting, call centre operations and direct sales across most industries and markets. Johanna has developed ICS into a leading provider of call and contact centre consulting and training solutions across the Asia Pacific region. She has substantial experience in call centre management and training, technology implementation, strategy development, business planning and profit centre responsibility.

Organisations profiting from ICS's work include: retail banking; telecommunications and e-business service providers; technology vendors; utilities; pharmaceuticals, educational institutions; insurance; state government; knowledge management; security; and multi-national manufacturing.

A leading product of Intellect Consulting Services and developed by Johanna is the ICT60102 *Advanced Diploma of Customer Contact Management*, which was included into the ICT02 Call Centre Training Package and is nationally recognised and registered with ANTA. The peak industry body, the Australian Teleservices Association (ATA) has endorsed this specific program as the premier qualification for current and future call and contact centre managers. The *Advanced Diploma* is delivered by ICS. Her book, *The Complete Guide to Call and Contact Centre Management*, was published in 2003.

Johanna has served as a Director on the National Board for the ATA and has published several articles on training and call centre management issues. She is a regular lecturer on the *Advanced Diploma of Customer Contact Management* and a sought-after conference speaker internationally.

Prior to founding ICS, Johanna was a Vice President at Citibank Australia where she established the Direct Mortgage Lending call centre channel encompassing a national customer base before implementing cross-border mortgage lending from Indonesia, Hong Kong, Singapore and Taiwan. Before joining Citibank, Johanna was the State Telemarketing Manager for Peter's Foods (then a subsidiary of Pacific Dunlop) and was responsible for three call centres throughout NSW and ACT.

Before moving into sales, marketing and call centres, Johanna worked as an Electrical Design Engineer with Texas Instruments, Dallas, TX, USA from 1987-1990.

Johanna's qualifications and memberships include:

- MBA, Macquarie University Graduate School of Management
- B Sc in Electrical Engineering, West Virginia University, USA
- Diploma in Training and Assessment Systems
- Certificate IV in Assessment & Workplace Training

Active memberships in the Australian Teleservices Association; Graduate Management Association of Australia; Australian Institute of Management; and the Australian Institute of Company Directors.

A brief sample of selected client projects, relevant to the experience required of the client, which Johanna has personally managed or fully delivered includes:



Capacity planning and management development – major global bank

Designed, developed and delivered customised *Effective Resource Planning and Analysis* program for the capacity planning team and senior managers whose responsibility extends to over 600 agents across a rapidly growing national call centre serving all of India. Course content similar to that proposed in this letter.

Core call centre competencies development – major utilities company

Developed full curriculum for a major Australia utilities organisation ranging from agents through to the team leaders, managers and the in-house training team for some 200 staff. Content included core call management, telesales, retention, complaint handling, and customer care. Management training course content included call centre operations fundamentals, coaching and performance management, real time queue management and more. All staff were fully assessed on competence in the key skills areas.

Capacity planning development – global financial services

Designed, developed and delivered customised *Effective Capacity Planning and Performance Monitoring* program for management and the call centre resource planning/forecasting teams for some 1000 agents across three countries and six centre sites. Course content was derived in part from the *Advanced Diploma of Customer Contact Management* in addition to comprehensive MIS design, data integrity and root cause analysis.

Resource planning and development – major national bank

Designed, developed and delivered customised *Effective Resource Planning and Analysis* program for the call centre resource planning and forecasting team whose responsibility extends to over 800 agents across several call centres nationally. Course content included elements of the *Advanced Diploma of Customer Contact Management* as well as detailed optimisation of the Bank's existing workforce planning technology.

Scheduling and forecasting in call centres – international professional training provider

Designed, developed and delivered *Scheduling and Forecasting in Call Centres* program for markets in Sydney, Melbourne, New Zealand and other major Asia-Pacific cities for call centre resource planning and forecasting professionals in large corporations. The course content included elements of the *Advanced Diploma of Customer Contact Management* and live demonstrations of state of the art workforce management technology for multi-contact centres. Client organisations included government, airlines, insurance, logistics management, technology, and many others.

Team leader training – major bank call centres

Designed, developed and assessed customised team leader program for over 165 team leaders across 12 call centres of a major retail bank. Program focus was on call coaching, performance data analysis, and day-to-day priority management, including real-time queue management tools.



Call centre development – international pharmaceutical company

Business and operational review for a national customer care centre. Development of customer service representative competency assessments and call centre manager coaching program. Key deliverable: optimising processes and strategically integrating the contact centre with the organisation. A comprehensive training program has also been developed and currently under delivery for all call centre staff in the skills areas of customer care, technical support, e-mail handling, telephone and other contact skills standards, complaints and personal performance management.

Operator and team leader development - national security organisation

Design and develop customised *Advanced Call Management for Call Centre Operators* program for a national security of over 300 call centre agents including Train the Trainer to deliver in-house capability. Designed and delivered the *Effective Team Leadership in Call Centres for Team Leaders* for some 40 team leaders across 9 call centres.

Telesales management– major international food company

Design and delivery of structured workshops for the managers of all Australian-based telemarketing centres for a major multinational's fast-moving consumer goods division. Areas of focus included the special skills required to manage an outbound sales team, campaign planning and execution and rep profiling.

Team leader development – telecommunications reseller

Developed comprehensive team leader training program for all call centre team leaders across 3 centres. Program outcomes covered all core aspects of team leadership in call centres and was based on best practices in coaching models, real-time management, and KPI settings. Program included a range of individual on-the-job coaching assessments, work-based projects and interactive and instruction-based learning.



Jane Greenop, Associate Corporate Trainer and Consultant

Since 1993 Jane Greenop has been working within call centres with her most recent corporate roles as a Resource Planner and then Call Centre Manager with a major Australian Bank, Westpac Banking Corporation. There she managed the Cards Services call centre comprising 170 full-time equivalent staff.

Jane has over 10 years' experience within workforce planning and call centre solutions which has enabled her to have an extensive knowledge of the fundamental dynamics of call centre queuing environments and how to bring about change in call centres. Some of her achievements and responsibilities include:

- Led a 170 FTE Credit Cards Call Centre, budget \$12m per annum
- Introduced forecasting and scheduling practices into the Cards Call Centre, achieving service level within 3 months, which was the first time for the call centre in 2 years.
- Led the WFP team, including 3 analysts, supporting the Cards Call Centre (275 FTE).
- Developed long term and short term staffing models that enabled the call centre to be adequately staffed and to achieve service level targets with forecasting accuracy of within 2% just 8 months after creation.
- Designed call traffic routing using the Lucent CMS, which resulted in reduction of misdirected calls and greater flexibility in traffic switching.
- Developed training for Call and Resource Planners, which enabled Planners to support different regions and provide standardised forecasts using models that were communicated to our customers.
- Coached and developed Call and Resource Planners in tools for planning.
- Coached and developed 10 team leaders to lead their teams, including performance management.
- Provided leadership through strike action at the call centre, ensuring minimal customer impact occurred.
- Facilitator of Performance Analysis training for Team Leaders.
- Introduced call centre KPI's (AHT, ATS, Quality and rework), which resulted in a reduction of rework from 600 to 200 instances per week, and a reduction of AHT.
- Designed the scoring matrix of the Call Centre Reward and Recognition Program. This program resulted in \$250,000 savings for the Bank, at a cost of \$7000 in prizes.
- Conducted performance analysis on Call Centre performance to identify areas of inefficiency, and provide suggestions on performance improvement.

Her continued industry involvement has extended to include lecturing on the *Advanced Diploma of Customer Contact Management*. Jane's qualifications include a Bachelor of Business in Computing (Credit), Masters of Management, Macquarie Graduate School of Management and several call centre technology training courses.