Workforce management (WFM) is no longer just about keeping call queues moving. It has evolved to the point that it can make meaningful, quantitative, value adding contributions to back office operations as well.

Historically, the contact center was the epicenter of the workforce management revolution, and for good reason. In the contact center, seconds count. Customer contacts come with high volume and frequency and often require immediate resolution. So it was the perfect environment to develop and refine techniques to monitor agent activities, refine predictions of contact patterns and resolution times, and optimize the deployment of agents to meet that demand.

Meanwhile, the sophistication of back office management has lagged. By comparison to the copious amount of data collected and processed about contact center operations, the back office has been a black hole. Allowing this to continue can be a costly mistake. Without reliable data about workforce processes, quantitative agent evaluations are difficult, introducing uncertainty and the potential for bias to the evaluation and promotion system. The need for overtime may be greatly overstated, with no insight into how that overtime can be reduced or eliminated. And agents may be performing certain tasks inefficiently, with no way to clearly identify the problem and take corrective action. Adapting the concepts of front office WFM to the back office is possible, practical, and a cutting edge way to improve the effectiveness and efficiency of what have traditionally been some of the most opaque processes in the organization.

How Workforce Management Fits Today’s Back Office

Back office professionals are the keepers of the cash box, the arbiters of risk, and often the final word in a customer transaction where pricing, purchasing, and fulfillment are concerned. They may be insulated from direct customer contact, but their activities and decisions play a huge role in customer service. Insurance claims processors, loan originators, and logistics experts, to name a few, are vital to the health of an organization’s value chain. They are also skilled information workers, creating pressure on management to make more efficient use of comparatively high-wage resources.

Conventional back offices worked standard hours (e.g. 8am-5pm), but overtime would be scheduled as needed to meet service level goals. In the past, multiple offices operated independently, with each office handling regional work. Just as with contact centers, greater efficiency can be provided by sharing work across sites. In the back office, electronic communications and document imaging systems provide the ability to easily share work across multiple sites, but it makes workforce management a more complex task. In addition, many back office workers do a variety of work depending on their skills.

WFM solutions excel at delivering optimized schedules across a multisite organization using a variety of start times, end times and shift durations while fully leveraging the multiple skills of all agents.

But even organizations which continue to use a traditional scheduling model, where all agent schedules start and end at the same time, can benefit from WFM. One of the most significant challenges in the modern back office is the opacity of agent activities. It is extremely difficult to measure the actual amount of time an employee spends on a single task or a particular customer case. Establishing a back office equivalent of “average handle time” is very difficult. The usual approach is a time-and-motion study—an expensive endeavor, and one which generally produces unreliable results. Employees under scrutiny in such a study cannot help but change the way they approach their tasks, providing a distorted picture of actual back office workflow. Time-and-motion data from a limited number of agents for a limited time and therefore a limited variety of work also impacts the accuracy of the study.

Adopting a workforce management mindset in the back office, along with the necessary procedural controls and metrics, provides more than the potential to make day-to-day operations more efficient through refined scheduling. It provides a common and trustworthy dataset for performance evaluation in the back office as well. Performance and efficiency evaluations in the back office have traditionally been highly subjective, and subjective evaluations create the risk of employee concerns about bias. Without consistent and trustworthy performance metrics, it is difficult to implement incentive and merit pay programs, so agents lose out on the opportunity to be rewarded for excellence.
When back office professionals are working in an environment where their skills are properly accounted for, they are given work that fits their capabilities, and are given accurate credit for time spent on that work, the evaluation process becomes more consistent. It also becomes more informative for management, who can use the same analytical approaches used in the contact center to analyze work trends, locate schedule variances, and identify performance outliers. All of that adds up to the ability to make meaningful, quantitative changes to the operation of the back office—which, after all, is very much a numbers-oriented part of the organization.

**Succeeding With Back Office WFM**

WFM in the back office helps companies evolve beyond simplistic performance goals and metrics which frustrate agents and management alike. Requirements such as “complete 30 work units per day” can be unfair to agents who work on multiple types of issues, because some jobs may require significantly more tasks and time to complete. At the other end of the spectrum, some agents can meet such a target well before the end of a scheduled shift, and end up invisibly idle (but still on paid time) until close of business.

Organizations have tried in the past to combat that problem by applying the concept of average handle time to back office processes, but early attempts were quickly thwarted by the lack of sophisticated monitoring tools and the complex realities of the back office. Consider an agent who first touches a document at 11 AM, opening the case. The agent files a response at 1 PM, closing the case. Was the handle time two hours? Possibly—the case may well have required two solid hours of research and activity. However, it is also possible that at some point during that span the agent may have gone on break or lunch, escalated a question about the case to another employee and switched to a different task while awaiting a reply, or simply made a decision to defer the resolution until the afternoon.

By combining WFM with desktop application monitoring systems, it is now possible to obtain an accurate view of the time each employee takes to complete tasks, across many of the same dimensions as an agent would be monitored in the contact center. This makes it possible to track user activity on a job-by-job basis, providing an accurate view of true handle time on each task.

The key to the solution’s back office approach is the ability to observe agent activity in software applications and map that activity to discrete jobs, cases, and tasks. Opening work items, key presses and button clicks can trigger the recording of timestamps when agents start and stop an activity, put the activity on hold as well as when the agents go idle (e.g. going to break or a lunch, etc.). By observing the applications agents use on a second-by-second basis, the system unobtrusively builds a picture of the true handle time. This passive and transparent observation is far superior to a time-and-motion study, which by its very nature can change the way agents behave. It is also free from bias and presents both individual and aggregate analysis of all agents at all times, not only those targeted for a brief survey window.

By chaining together multiple steps in tasks, the desktop application monitoring system can recognize entire business processes, even those which span multiple desktop applications, such as the sequence of tasks necessary to process a new loan request or an insurance claim. This process-level monitoring allows the different methods of each agent to be evaluated and compared, helping sort best practices from those which need coaching or correction. It also allows managers and supervisors to spot systematic inefficiencies which should be addressed across the entire organization.

As an added benefit, application monitoring provides an accurate view of agent idle status as well as schedule adherence. This can help organizations understand internal workflow as well as the actual output received in each scheduled day and interval.

All of this can be done with workforce management solutions without costly application integration, and without abandoning your organization's current back office tools. The desktop application monitoring occurs at the operating system level, meaning it is compatible with everything from leading-edge, browser-based applications to legacy green screen terminal emulators.

**Back Office Innovations through Workforce Management**

With a WFM strategy and the right tools to support it, the back office can introduce innovative practices without sacrificing quality or accuracy around core tasks. Just as it does in the contact center,
WFM unlocks a wide range of new scheduling opportunities for back office personnel. The WFM system can create schedules in a manner to match the technology employed to route the back office work. If some agents only handle one type of back office work, then single skill schedules are easily created. If agents need to login to different systems to handle different back office work, then skill block scheduling can be used. The skill block scheduling approach assigns agents to different channels on an interval basis, rather than on a daily basis. At its simplest level, this enables back offices to focus attention on queues based on the expected workload.

For example, consider a company which receives a large quantity of e-mails and a much smaller quantity of faxes. In this case, all agents are scheduled to handle e-mail by default and specific blocks of time are scheduled for certain skilled agents to handle faxes. Block scheduling can be used to blend more than one channel in each interval. Alternatively, if the back office has a work routing system that can route multiple work types to agents, then the scheduler can use Multiskill scheduling to provide accurate schedules in this universal queue environment. For example, in an insurance company back office, some employees may be qualified only to begin the paperwork process on a client claim, while others can not only begin the claims process, but schedule inspections, approve or deny portions of a claim, disburse payments, or initiate fraud investigations. The multiskill feature ensures that enough of the appropriately skilled employees are scheduled to meet the projected work.

These scheduling techniques are backed by forecasting which combines the sophisticated predictive modeling learned from years of contact center experience with refinements to the unique conditions of the back office. Specifically, back office forecasting and modeling takes into account the longer service level targets (often hours or even days, instead of mere seconds in the contact center) as well as the fact that most tasks will not be resolved during the same interval that they enter the queue. Multiskill simulation embedded within the scheduling process is used to determine how to best use multiskilled agents.

Sophisticated, back office-specific simulation extends to intraday management, by updating staffing requirements and coverage lines based on schedule changes. Supervisors and planners can address surges in customer contacts by simulating the impact of a sudden change in operating conditions and decide whether or not to call in additional agents or offer overtime if 100 e-mails are in danger of not being answered within the service level goal during the afternoon.

WFM makes true performance management in the back office possible, freeing supervisors from unreliable and intrusive shoulder-surfing and providing reliable and consistent data on the best and worst agents in the organization. This data can be used to build value-minded KPIs and scorecards for individual agents as well as groups and teams.

With hard data and automated analysis, the back office can analyze each process by number of tasks completed, total time as well as averages, minimums, and maximums. This not only identifies the fastest and most productive agents, but can be used to pinpoint particularly efficient or inefficient approaches to each process—great fodder for coaching and e-learning, as well as incentive and improvement rewards. Back office employees benefit from WFM as well. Performance management offers new opportunities for reward and advancement, but the advantages extend beyond the paycheck. Back offices with variable schedules can give employees the same access to schedule bidding, preferences, and trading that contact center agents enjoy, along with timeoff requests that make the vacation process faster and more transparent. On-demand personal performance metrics help keep employees informed and aware of their contributions to the business and their standing among peers.

Ready For Business Today

Not sure your back office is ready for a WFM overhaul? Then consider this: when employees know they are held responsible for being focused and on-task, their performance improves. Contact centers that implement WFM see a boost in productivity between five and 25 percent, and the prospects for improved performance are even greater. With accurate handling time calculations, you will be able to accurately track the average cost per transaction, a metric that is often asked for by upper management, but often impossible to calculate.

The back office is home to some of the most skill-intensive and customer-critical processes in your organization. Those vital contributions deserve to be backed by modern solutions that put the right tasks in the hands of the right employees at the right time, banishing the back office’s reputation as a black hole and instead making it an accountable and visible component of the modern enterprise.
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