



# Aspect EQ™ Workforce Management™

To compete in the omni-channel marketplace, you need to plan and deploy the right staff, at the right time, for the right customer. Aspect EQ Workforce Management is an easy-to-use forecasting, planning, scheduling, employee self-service and real-time management tool that ensures every employee and supervisor is productive, engaged and delivering an exceptional customer experience at the lowest cost.



**As the global leader in workforce management, Aspect ensures you have the right agents, with the right skills, at the right time and helps plan and manage the performance of inbound, outbound and blended staffing resources across all customer channels. Aspect EQ Workforce Management can be extended beyond the contact center to manage enterprise experts and back office personnel that can be blended with front office agents to get the most from your total workforce. The software's core forecasting, scheduling and tracking capabilities allow organizations to accurately project future staffing requirements to support customer demand and back office task completion, create efficient single and multi-skill staffing plans, evaluate schedule efficiency, monitor staff performance and adjust resources to meet changing demand in real-time.**

## Key Differentiators for Aspect

### ✓ Modern, Graphical User Interface

Highly simplified, web-based, graphical user interface with same look and feel as other WFO components significantly increases agent and supervisor productivity even for complex schedule trades or sequential shift bids.

### ✓ Multi-Channel Performance

Optimally blend staff across all channels including inbound/outbound voice, email, webchat, SMS, IM and social media.

### ✓ Multi-skill Back Office Support

Apply workforce management best practices to the back office and blend back office labor with front office labor.

### ✓ Forecasting Accuracy

Unparalleled forecasting accuracy with multiple forecasting algorithms, variable historical pattern weights and accurate intra-day shrinkage.

### ✓ Business Planning

Explore the effect of disruptions and constraints in demand and resources with unlimited "what-if" scenarios. Perform analysis with drill down and roll up capabilities in user customizable views of key business information including agent productivity, intra-day performance data, staff shrinkage, and superstate analysis.

### ✓ Schedule Optimization

Optimize schedules based on business need (requirements based), employee preference (preference based) or both.

### ✓ Schedule Validation

Create and test limitless trial schedules that optimize business needs and resources before making the best schedule official.

### ✓ Real-time Adherence Monitoring

Real-time views that automatically surface non-compliance in even the largest contact center environments available in Web UI.

### ✓ 64 Bit Architecture

Take advantage of the power inherent in 64 bit hardware/software platforms.

### ✓ Employee Self-Service Empowers Agents

Browser-based self-service scheduling with new trade and request rules provides scheduling flexibility and minimizes administrative overhead.

### ✓ Deployment Flexibility

Choose the options that fit your business needs and operational environment; deploy on-premise, hosted or in the cloud as a stand-alone solution or as an integral part of the Aspect EQ Workforce Optimization Suite.

## Key Components

### • Workforce Optimization User Interface

Aspect EQ™ Workforce Management™ integrates seamlessly with the other recent versions of the Aspect EQ™ Workforce Optimization™ Suite. Agents are provided with a single graphical user interface for all components of Aspect EQ Workforce Optimization, which sports a modern, uniform, look and feel similar to the interfaces being used by Apple iOS, Google Android and Microsoft Windows. This responsive web design supports all popular browsers including Internet Explorer, Safari, Firefox and Chrome and adapts to multiple display devices including PCs, laptops, tablets and smartphones of varying sizes. Unlike some other workforce management providers in the market, no browser plug-ins are necessary to achieve full functionality.

With this new user-focused design, Aspect has been able to remove any technology barrier between the agent and the complexities of workforce management. With easy-to-understand graphical icons, widgets, dashboards and screen layouts, agents can understand key performance details at a glance, and streamlined navigation allows agents to get to specific areas of the program more quickly and efficiently. In essence, agents can accomplish their tasks with fewer clicks and in less time than has ever been possible before.

### • Back Office Management

The Back Office Performance Module makes WFM as useful in the back office as it is in the front office. Traditional front office workforce management systems cannot be used effectively in the back office because, unlike the front office, the back office typically requires execution of several parallel tasks with backlog accumulation at each step. Further, the employees staffing the back office usually can perform multiple tasks, so staffing projections for these multi-skilled employees is more complex than in a contact center. For example, a mortgage application back office process would require application review, credit checks, asset verification, retrieving copies of pay stubs and tax returns, scheduling an appraisal, scheduling the title search, underwriting, and scheduling closing. The Back Office Performance Module allows traditional workforce management capabilities of forecasting work, scheduling employees and tracking actual staffing to be applied in the back office environment.

### • Multi-Channel Performance

Multi-Channel Performance is a standard component of core WFM, but it is unique in the marketplace. In a world that is rapidly adopting digital channels for customer care, this important new feature gives the workforce management staff the ability to optimally blend staff across all channels including inbound/outbound voice, email and multi-skill multi-conversation webchat, SMS, IM and social media direct messaging. At present, non-voice agents are likely being scheduled in dedicated time slots without the ability to predict demand for staff other than by heuristics. The new module enables enterprises to accurately project staff to meet entirely new service and quality goals applicable to text-based channels.

### • Strategic Planning and Forecasting

Evaluate multiple staffing scenarios to determine optimal resource deployment based on projected demand and resource pool characteristics for both short-term and long-term planning. Take all pertinent data into account including historical contact volumes, seasonal patterns, campaign completion rates and holiday variations. Using an exponentially weighted moving average tailored to each forecast group, the forecasting model merges historical data with current data providing the most accurate forecasts possible. Contact center planners can:

- Quickly evaluate trade-offs between service quality and staffing numbers
- Determine the impact of scheduling training, meetings and other off-phone activities on service and campaign goals
- Understand impact of service quality goals and demand patterns on budget

### • "What-if" Analysis

Test multiple demand and staffing models and plan for unexpected events such as staff absences, a surge in demand from one or more channels, the effect of holidays or weather or other seasonal factors. Create multiple scenarios leveraging historical demand and staff patterns with the ability to adjust and include custom data that fits your business needs. Visualize the effect of your planning through trial schedules, allowing you to fully test the impact of decisions on your staff and service level goals. Be confident that your long-term, short-term and intra-day staffing adjustments will have the right business impact.

### • Multi-Skill Support

Develop optimal forecasts for a blended environment and identify staffing requirements and optimal skill combinations based on agent skill and contact routing needs. For planners, it provides an accurate assessment of costs and benefits of skill-based routing models for your current and future resource pool.

### • Flexible Scheduling

Create detailed employee schedules based on demand and resource availability, employee preferences, work and equity rules, union or other contractual schedule restrictions, or leverage a combined approach. Choose from a two-step process where

multiple trial schedules are generated that optimize against all parameters, and select the schedule that best fits your need. Alternatively, use a one-step process based on employee preference and automatically assign employees as the schedule is generated.

#### • Intra-Day Tracking

Display statistics about your contact center's performance across all channels while you still have time to make changes. Compare actual versus forecasted contact and staffing statistics for both inbound and outbound resources in 15- or 30-minute intervals to take the real-time corrective change to keep your staff on track. In the Web UI, use at-a-glance views of agents' schedules to determine what activities have been scheduled or how many agents are scheduled for a specific activity to easily identify utilization gaps and the resources available for assignments. Manage with more accurate intra-day staffing level predictions, taking into account the amount of staff shrinkage likely to occur beyond what is already represented in schedules. Receive real-time alarms in new UI when agents are not adhering to official schedule, then use the history of alarms for detailed analysis and reporting to surface underlying trends.

#### • Workforce Analytics

Benefit from centralized access to all employee-centered metrics captured within workforce management such as group assignment, schedule preference, skills, seat reservations and more. Includes the ability to extend the view with additional performance and quality metrics from Aspect's full workforce optimization suite. Create custom reports that zero-in on employees and schedules to better understand your workforce environment. Target management decisions such as training and re-assignment based on your selection.

#### • Integrated Performance Management

Utilize KPI-based reporting on the full breadth of workforce metrics such as schedule adherence, shrinkage, service level and more with over 150 pre-packaged reports. This includes the ability to source additional relevant data from enterprise systems and to create alerts and trigger workflows based on KPI thresholds.

#### • Employee Self-Service

Allow for scheduling flexibility while ensuring service level achievement for in-house, home-based or remote agents. Empower agents with powerful, web-based self-service, and free supervisors from routine approvals and schedule exception management. Aspect allows for schedule trades, sequential shift bidding between two or more agents, a schedule trades bulletin board, time-off requests, vacation balance checking and more for the agent in an intuitive interface. Supervisors can view schedule information for a list of employees for a given time period and do batch scheduled edits. Preview the effect of a trade on agents' schedules and enable Supervisor to broker schedule trades. Requests can be prioritized based on business rules such as seniority, labor rules, performance, business needs or any combination of factors. Approvals can be routed to supervisors for manual inspection and approval. Optionally use IVR, natural language text, IM or social media direct messaging to make remote agent access as simple and easy as possible.

#### • Backed by Unified Communication

Ensure that all users have an easy way to gauge availability and connect to their peers, managers, and other enterprise resources through email or IM using tight integration with unified communications (such as Microsoft Lync).

#### • Seamless Enterprise Fit

Enjoy full integration to Aspect® Unified IP® and support for integration with third party interaction management environments. It fully leverages your enterprise technology investments for account administration (Windows domain-based authentication or claims-based authentication), data security (SSL), and work calendar (Microsoft Outlook). Aspect EQ™ Workforce Management can be leveraged as a stand-alone application or as part of Aspect EQ™ Workforce Optimization Suite, a comprehensive and fully integrated solution that synthesizes analytics, performance management, quality management, and interaction recording. It can be deployed on-premise, in the cloud (Aspect® Hosted or pure cloud), or as a hybrid model.

#### • Deployment Flexibility

Select from a variety of optional modules to create a workforce management environment that fits your business need – on-premise, hosted or in the cloud:

- **Empower:** Utilize web-based self-service for agent schedules, change requests, trades, shift-bidding and more
- **Perform:** Provide agent productivity insights in real time, intra-day, daily and historical detail
- **Allocate:** Utilize advanced capabilities for managing multiple locations as a single operational environment
- **Reserve:** Manage agent seats based on real-time schedules and agent characteristics
- **Encompass:** Facilitates exchange of workforce management data between in-house and outsourced environments

## Aspect EQ™ Workforce Management™

### Enables You To:

- Staff the right number and type of people at the right time to improve sales-per-hour ratios, dollars collected, customer retention and many other important KPIs
- Improve productivity in the back office with savings typically ranging from 20 – 40%
- Optimally staff agents in all contact center channels
- Evaluate multiple staffing scenarios with powerful strategic "what-if" analysis
- Utilize unique multi-skill forecasting and scheduling to determine optimal skill combinations
- Create schedules based on employee preferences, shift templates, work/equity rules or a combination
- Make accurate intra-day adjustments to improve list penetration and effectiveness rates
- Optimize meetings, training and other off-phone activities
- Maximize occupancy and minimize over and under resource utilization
- Cut staffing costs while maintaining or even improving response times
- Reduce the complexity in your contact center with an integrated, total solution

### Key Features

- Intuitive, modern, icon and widget based user interface is very easy to learn and use to ensure the highest workforce productivity
- User interfaces thoughtfully designed to make every user interaction as simple as possible
- Intra-day, short-term, medium-term and long-term business planning with limitless "what-if" scenarios
- Sophisticated forecasting algorithms that leverage full breadth of historical and intra-day shrinkage data and support multiple business objectives
- Forecasting, planning and scheduling for a multi-skill workforce in a multi-channel environment
- Accurate forecasting across all inbound, outbound, digital, blended, chat, email and back office staffing resources
- Scheduling based on business requirements, employee preference or both
- Centralized visibility into employee characteristics, preferences, schedules, and performance
- Real-time intra-day performance and agent adherence tracking
- Store, analyze and report on real-time alarms generated by rules that are easily and centrally configured
- Browser-based agent self-service including schedule trades, sequential shift bidding and schedule trades bulletin board
- Agent performance scorecards and workforce intelligence
- Simplified management of workforces across multiple sites and outsourced locations
- Automated seat planning and assignment tools
- Fully integrated with Aspect's Interaction Management platform (Aspect® Unified IP®) with additional support for virtually any interaction management environment
- Available in English, French, German, Spanish, Portuguese, Chinese (Simplified), Chinese (Traditional), Japanese, Russian and Korean
- Compatible with Office 365

The dashboard features several key components:

- Schedule:** Displays a weekly view with shifts labeled as SERVICE, MEET, BREAK, and FREE.
- Request Viewer:** Shows a list of requests for July, including details like date, time, and agent.
- Customer Service Scores:** A bar chart showing scores for Personal, 7/7, and 7/7 categories for the week of 28, 2014.
- Coaching:** A summary of assignments: 0 Unread, 0 Not Started, 0 In Progress, 0 Completed, and 0 Late.
- Shift Bids:** A section for Sequential Shift Bids and Shift Trades Bulletin Board.
- Agent Productivity:** A summary of compliance time percentages: 66.57% and 16%.
- Customer Service:** Summary statistics including 6% and 16%.

Example WFO Dashboard with WFM Widgets

**ADHERENCE VIEW**

3/24/2016 - 3/25/2016

Employee	Start Time	End Time	Duration	Status
Abdo, James (3000)	03:30:00 AM	07:30:00 AM	04:00:00	On Line
Abdo, James (3000)	03:42:57 AM	07:16:00 AM	03:33:43	Off Line
Abernathy, Jackie K. (2222)	08:00:00 AM	10:15:00 AM	02:15:00	ON Line
Abernathy, Jackie K. (2222)	10:30:00 AM	12:00:00 PM	01:30:00	ON Line
Anthony, Paulette (6666)	08:00:00 AM	10:15:00 AM	02:15:00	ON Line
Anthony, Paulette (6666)	10:30:00 AM	12:00:00 PM	01:30:00	ON Line
Barnett, Anne M. (2002)	08:00:00 AM	10:15:00 AM	02:15:00	ON Line
Barnett, Anne M. (2002)	10:30:00 AM	12:00:00 PM	01:30:00	ON Line
Burchett, Frances S. (2125)	08:00:00 AM	10:15:00 AM	02:15:00	ON Line
Cabreza, Diana (7777)	08:00:00 AM	10:45:00 AM	02:45:00	ON Line
Dale, Nathan (8144)	08:00:00 AM	09:15:00 AM	01:15:00	ON Line
Hooper, Andrew (6614)	08:00:00 AM	09:15:00 AM	01:15:00	ON Line

**STATISTICS**

Employee	Times	State	Total	In Adherence	Out of Adherence	Total In/Out
Anthony, Paulette (6666)	09:01:27	ON Line	7:30:00	8:22:33	7:00:24	93.42%
Anne M. Barnett	08:34:10	OFF Line	2:00:00	2:14:00	1:23:15	68.34%
Anne M. Barnett	08:34:10	ON Line	6:30:00	6:20:10	5:39:15	86.97%
Anne M. Barnett	08:51:59	OFF Line	1:00:00	1:33:32	0:38:37	64.36%
Anne M. Barnett	08:51:59	ON Line	7:30:00	7:18:27	6:35:05	87.79%
Anne M. Barnett	08:49:30	OFF Line	1:00:00	1:14:47	0:42:13	70.36%
Anne M. Barnett	08:49:30	ON Line	7:30:00	7:34:43	6:57:28	92.76%
Anne M. Barnett	08:41:43	OFF Line	2:00:00	3:02:51	1:49:28	83.72%
Anne M. Barnett	08:41:43	ON Line	6:30:00	5:38:52	5:07:37	78.87%
Anne M. Barnett	08:30:00	OFF Line	2:00:00	2:39:41	1:39:58	83.31%
<b>Total</b>			516:30:00	535:21:16	434:47:38	84.18%
						18:51:16
						01:42:22
						416:56:22

1 - 50 of 130 items

Example Adherence View in Web UI

**SEQUENTIAL SHIFT BIDS SCREEN**

**SEQUENTIAL SHIFT BID DETAILS**

Q4 2014 bid (Q4 2014 bid)  
Available Until: 10/1/2014 12:01 AM Retrieved: 7/7/2014 6:31 PM

State	Seq	Start/Stop	Days Worked
Assigned	78	8:00 AM-4:30 PM	MTWRF-MTWRF-- MTWRF-MTWRF-- MT
Available	83	8:00 AM-4:30 PM	MTWRF-MTWRF-- MTWRF-MTWRF-- MT
Available	84	7:30 AM-4:00 PM	MTWRF-MTWRF-- MTWRF-MTWRF-- MT
Available	85	8:00 AM-4:30 PM	MTWRF-MTWRF-- MTWRF-MTWRF-- MT
Available	86	7:30 AM-4:00 PM	MTWRF-MTWRF-- MTWRF-MTWRF-- MT

**SCHEDULE DETAILS**

Date	Day	Start Time	End Time
9/29/2014 - 1/2/2015	Monday, 9/29/2014	1:00 PM - 9:30 PM	
	LUNCH - Unpaid break	5:00 PM - 5:30 PM	00:30
	BREAK LAST - Last break	8:00 PM - 8:15 PM	00:15
	BREAK 1ST - First break	3:15 PM - 3:30 PM	00:15
	SERVICE - Customer Service	1:00 PM - 9:30 PM	00:30
	Tuesday, 9/30/2014	1:00 PM - 9:30 PM	
	Wednesday, 10/1/2014	1:00 PM - 9:30 PM	
	Thursday, 10/2/2014	1:00 PM - 9:30 PM	
	Friday, 10/3/2014	1:00 PM - 9:30 PM	
	Monday, 10/6/2014	1:00 PM - 9:30 PM	
	Tuesday, 10/7/2014	1:00 PM - 9:30 PM	
	Wednesday, 10/8/2014	1:00 PM - 9:30 PM	
	Thursday, 10/9/2014	1:00 PM - 9:30 PM	

(GMT) Universal Coordinated Time (UTC)

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## About Aspect

Aspect's fully-integrated solution unifies the three most important facets of modern customer engagement strategy: customer interaction management, workforce optimization, and back-office. Through a full suite of cloud, hosted and hybrid deployment options, we help the world's most demanding contact centers and back offices seamlessly align their people, processes and touch points to deliver remarkable customer experiences. For more information, visit [www.aspect.com](http://www.aspect.com).

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