

# Sample WFM Staffing Model

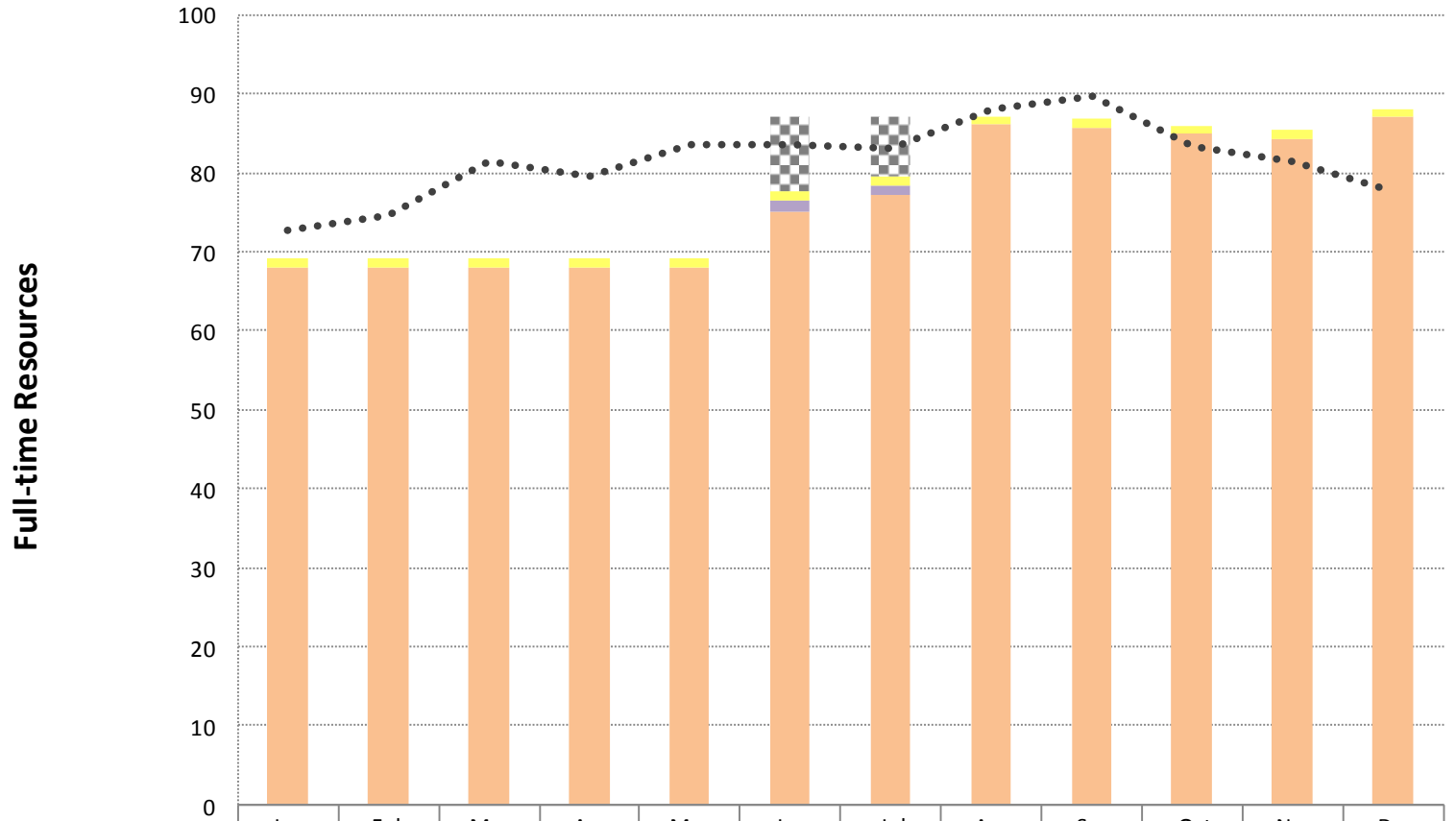


*Re-humanize your call center.*

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Updated on **July 4<sup>th</sup>, 2015**

# Staffing & Capacity Plans

## 2015 Staff with 10% Paced Attrition Planned vs. Required



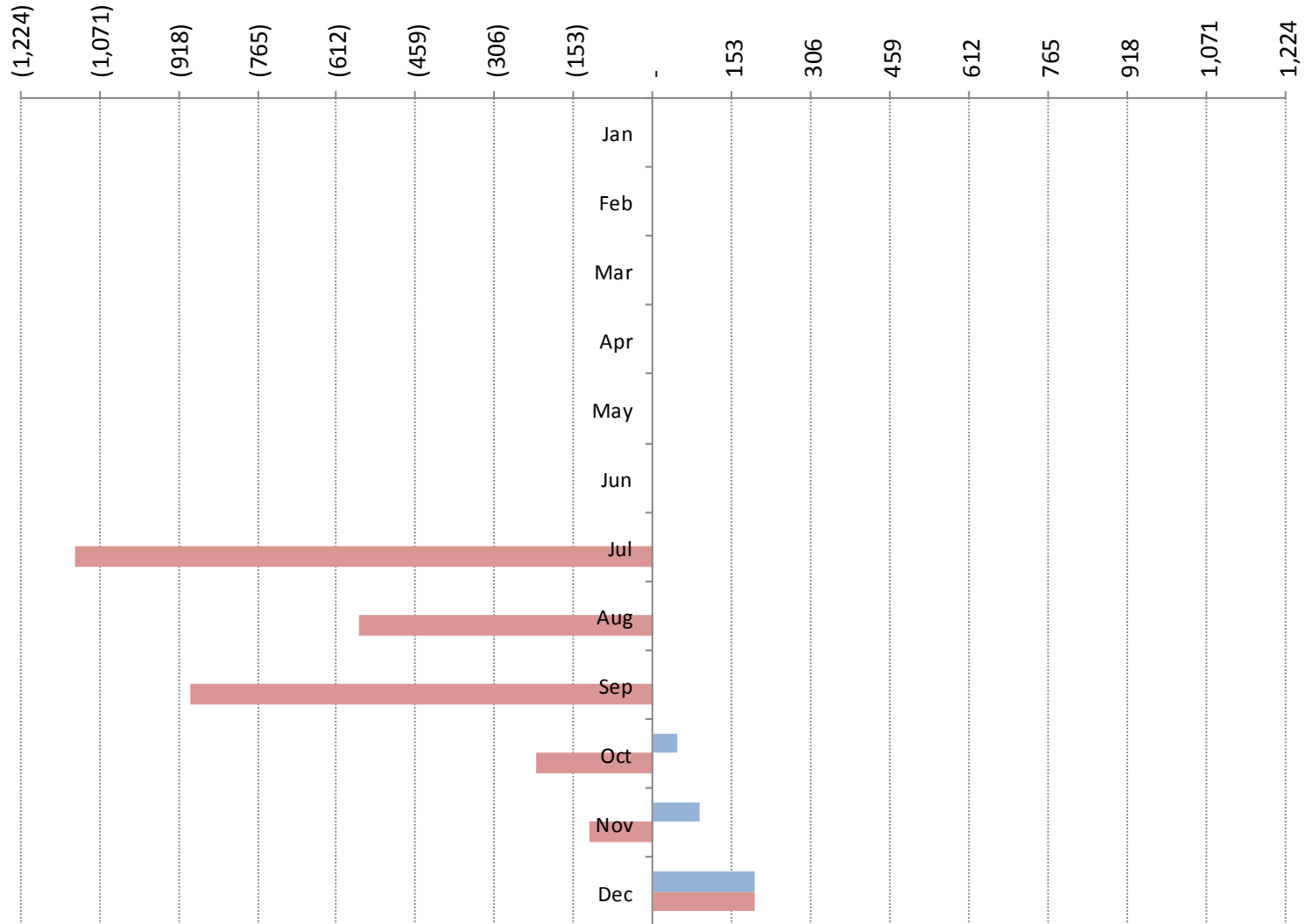
|                                  | Jan  | Feb  | Mar  | Apr  | May  | Jun  | Jul  | Aug  | Sep  | Oct  | Nov  | Dec  |
|----------------------------------|------|------|------|------|------|------|------|------|------|------|------|------|
| Onboarding FTE                   | -    | -    | -    | -    | -    | 9.5  | 7.6  | -    | -    | -    | -    | -    |
| Additional FTE                   | 1.0  | 1.0  | 1.0  | 1.0  | 1.0  | 1.0  | 1.0  | 1.0  | 1.0  | 1.0  | 1.0  | 1.0  |
| Part-Time Perm FTE               | -    | -    | -    | -    | -    | 1.5  | 1.2  | -    | -    | -    | -    | -    |
| Full-time Headcount              | 68.0 | 68.0 | 68.0 | 68.0 | 68.0 | 75.0 | 77.2 | 86.0 | 85.7 | 84.9 | 84.3 | 87.0 |
| Actual / Forecasted Required FTE | 72.6 | 74.7 | 81.5 | 79.5 | 83.7 | 83.5 | 83.1 | 88.0 | 89.8 | 83.5 | 81.5 | 77.7 |
| Forecasted Net Staff             |      |      |      |      |      |      | -7.9 | -5.3 | -6.5 | -1.8 | -0.4 | 3.4  |

# 2015 Extra Capacity vs. Understaffing

643 hours = 5 FTE

*Estimates in Progress...*

■ Extra Capacity Hours  
■ Understaffed Hours

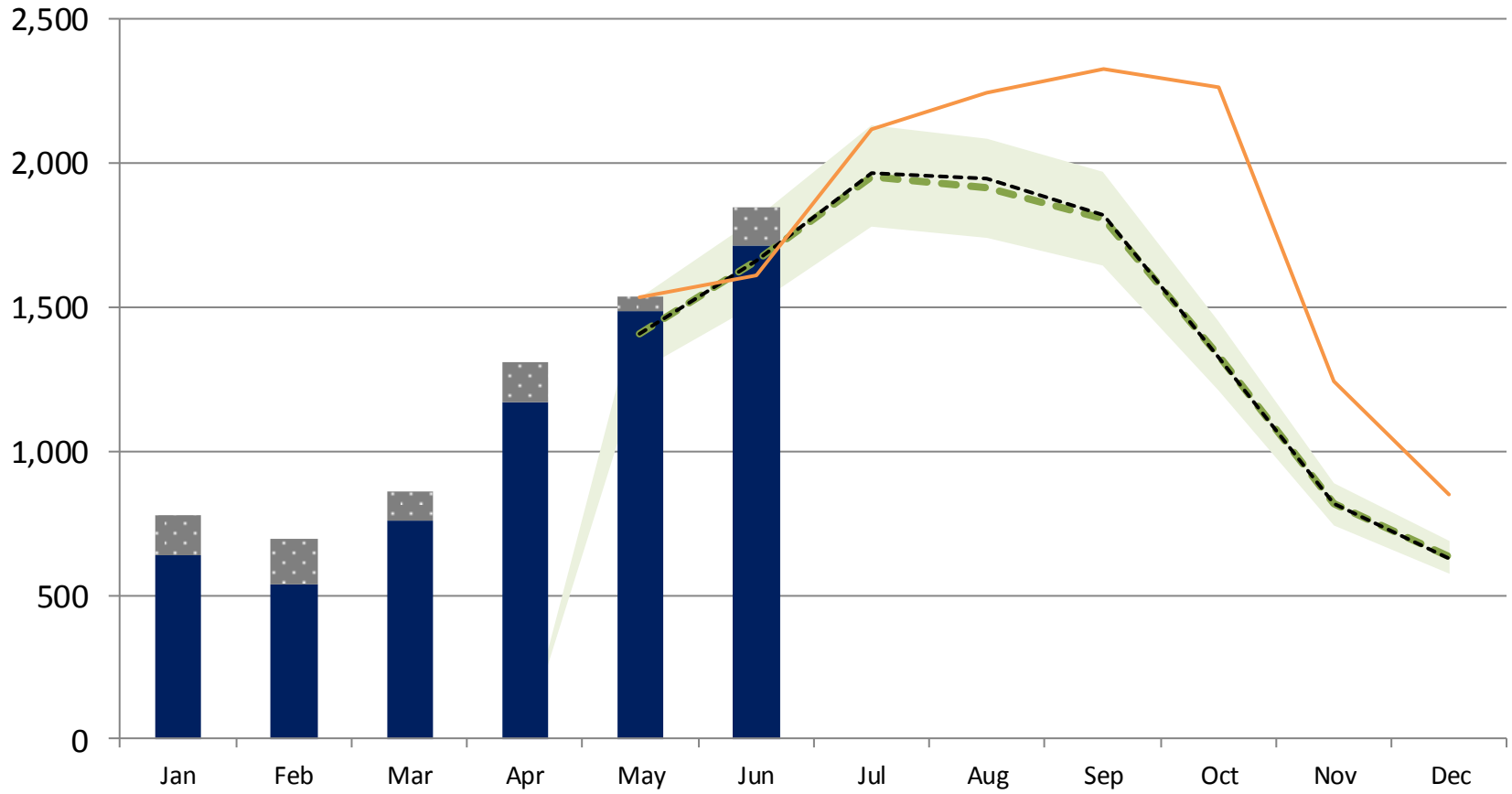
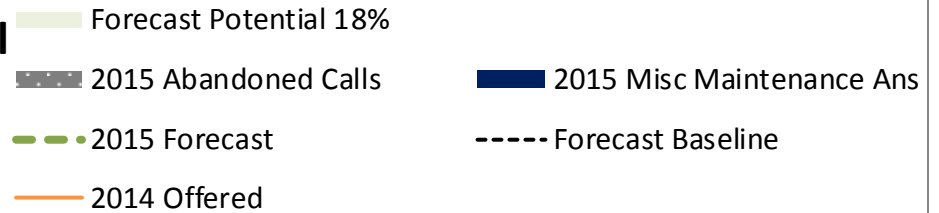


# Phone & AHT Forecasts

### 123: Misc Maintenance FCST vs. Actual

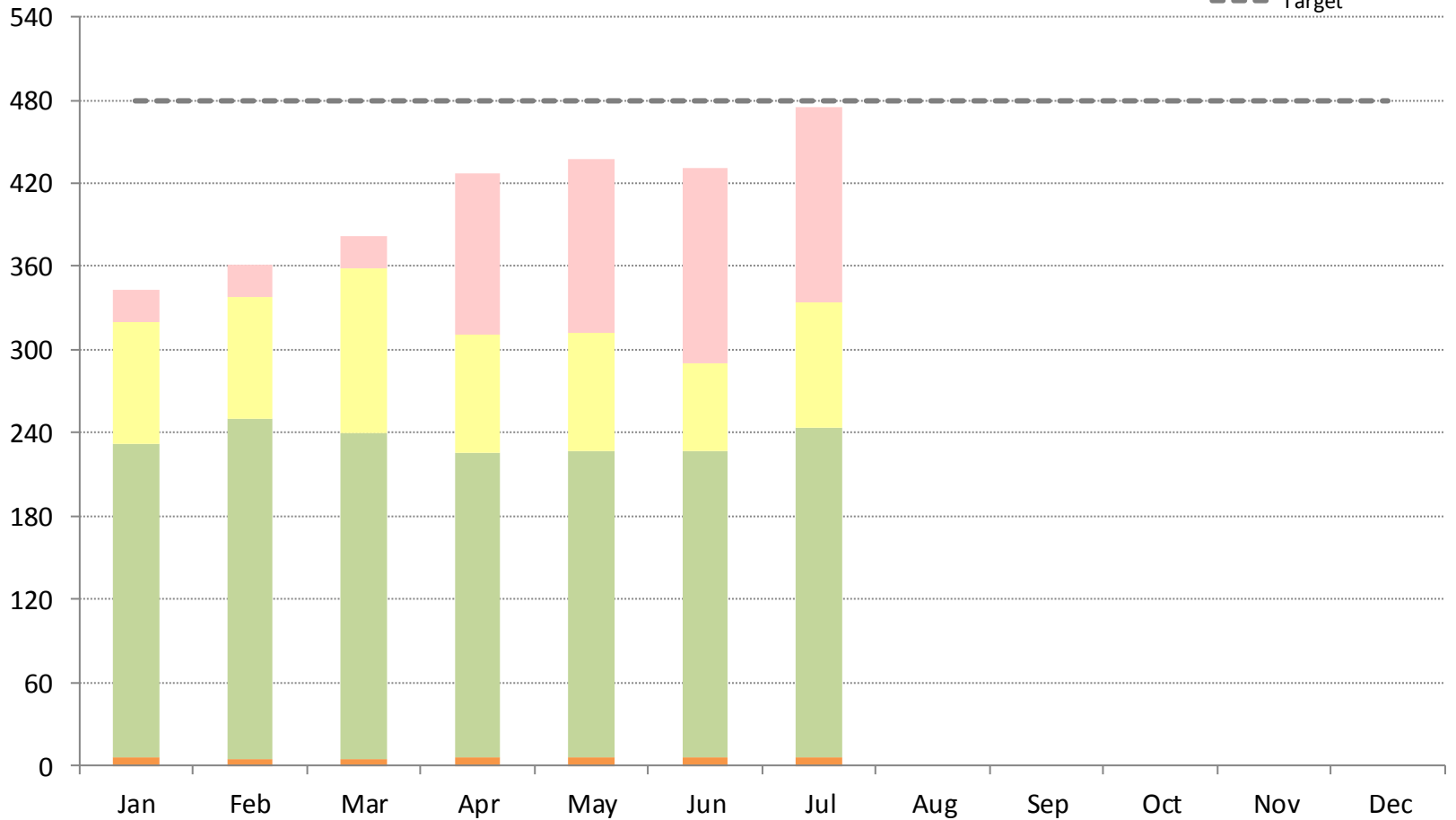
Uses normal trend

Confidence Level = 91%



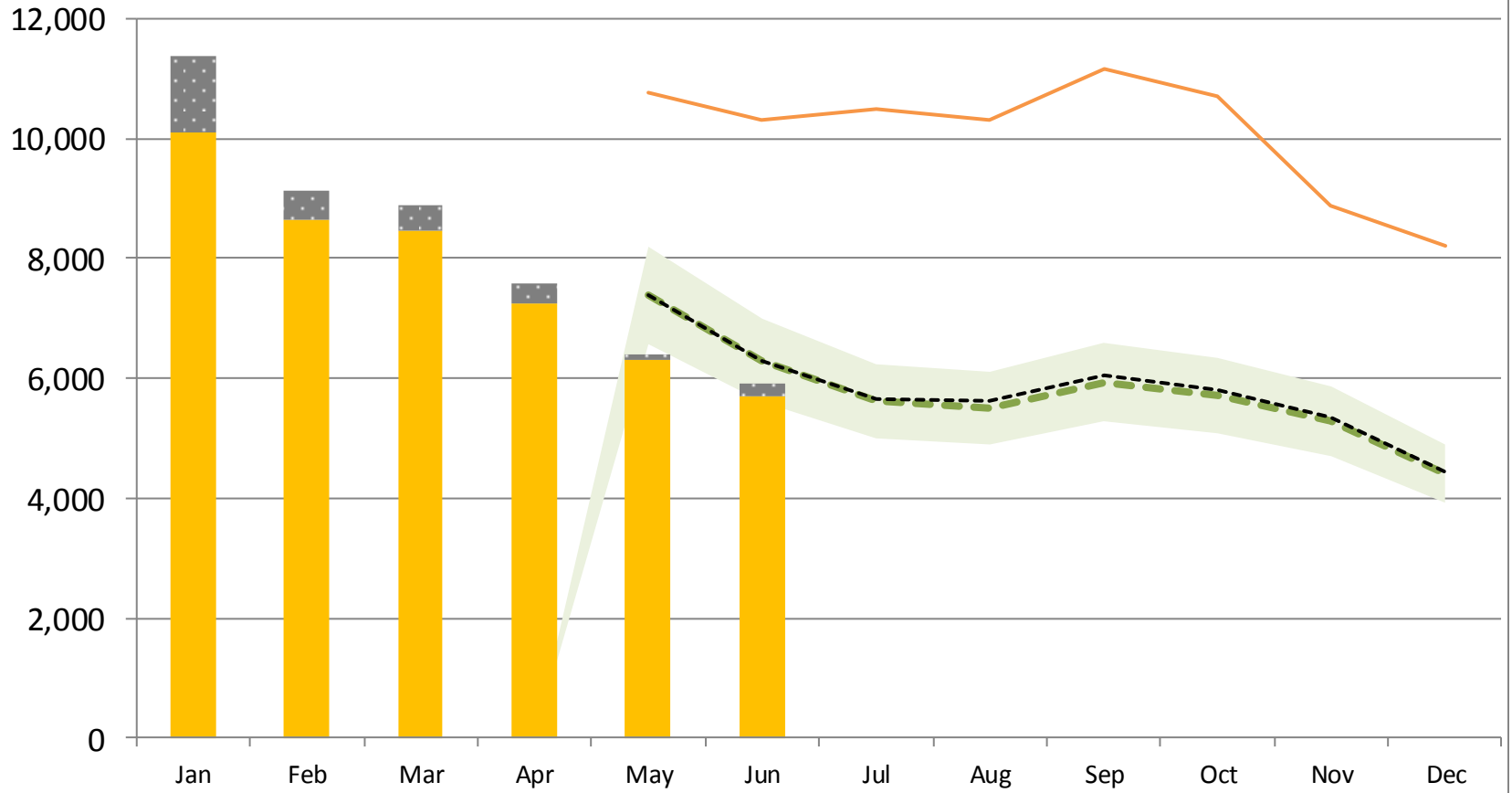
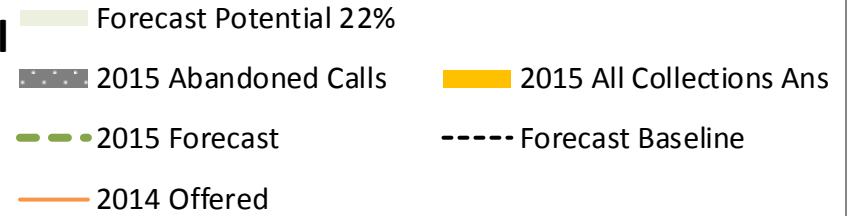
# 2015 AHT Misc Maintenance

- ACW Time
- Hold Time
- Talk Time
- Ring Time
- Target



## 200s: Collections Inquiries FCST vs. Actual

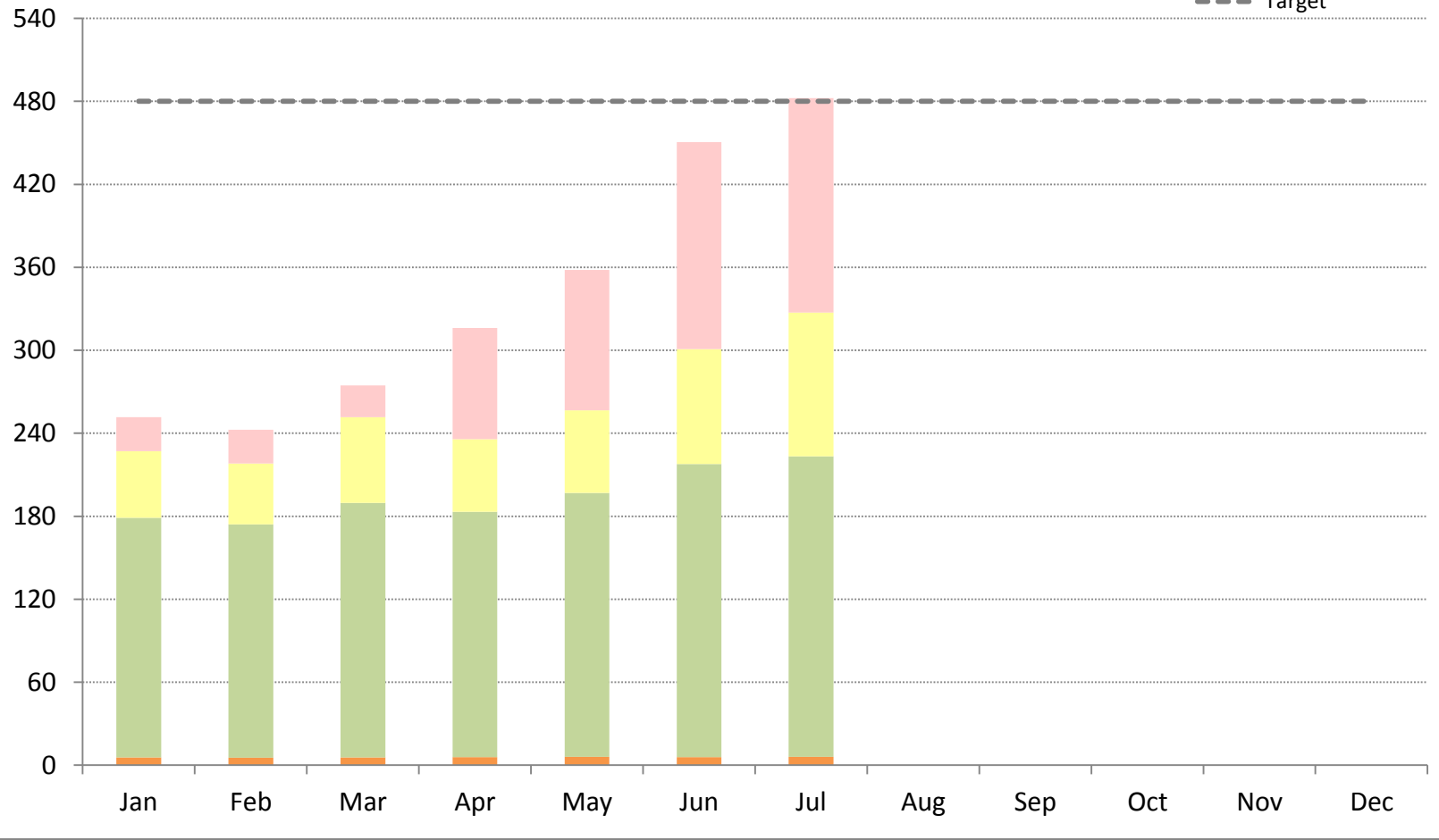
Uses -45% Seasonal Reduction, then -42% YTD  
Confidence Level = 89%



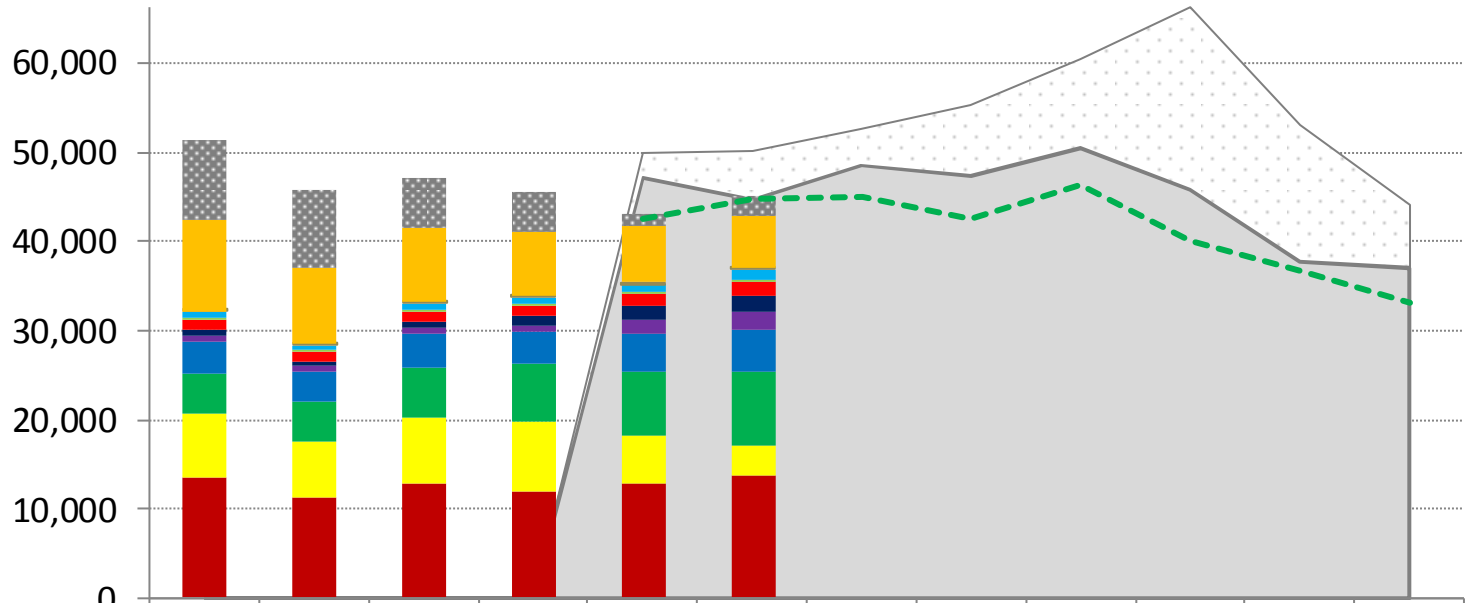


# 2015 AHT Collections

- Ring Time
- Talk Time
- Hold Time
- ACW Time
- Target



**Aggregate Inquiries'  
Monthly Phone  
Volumes**

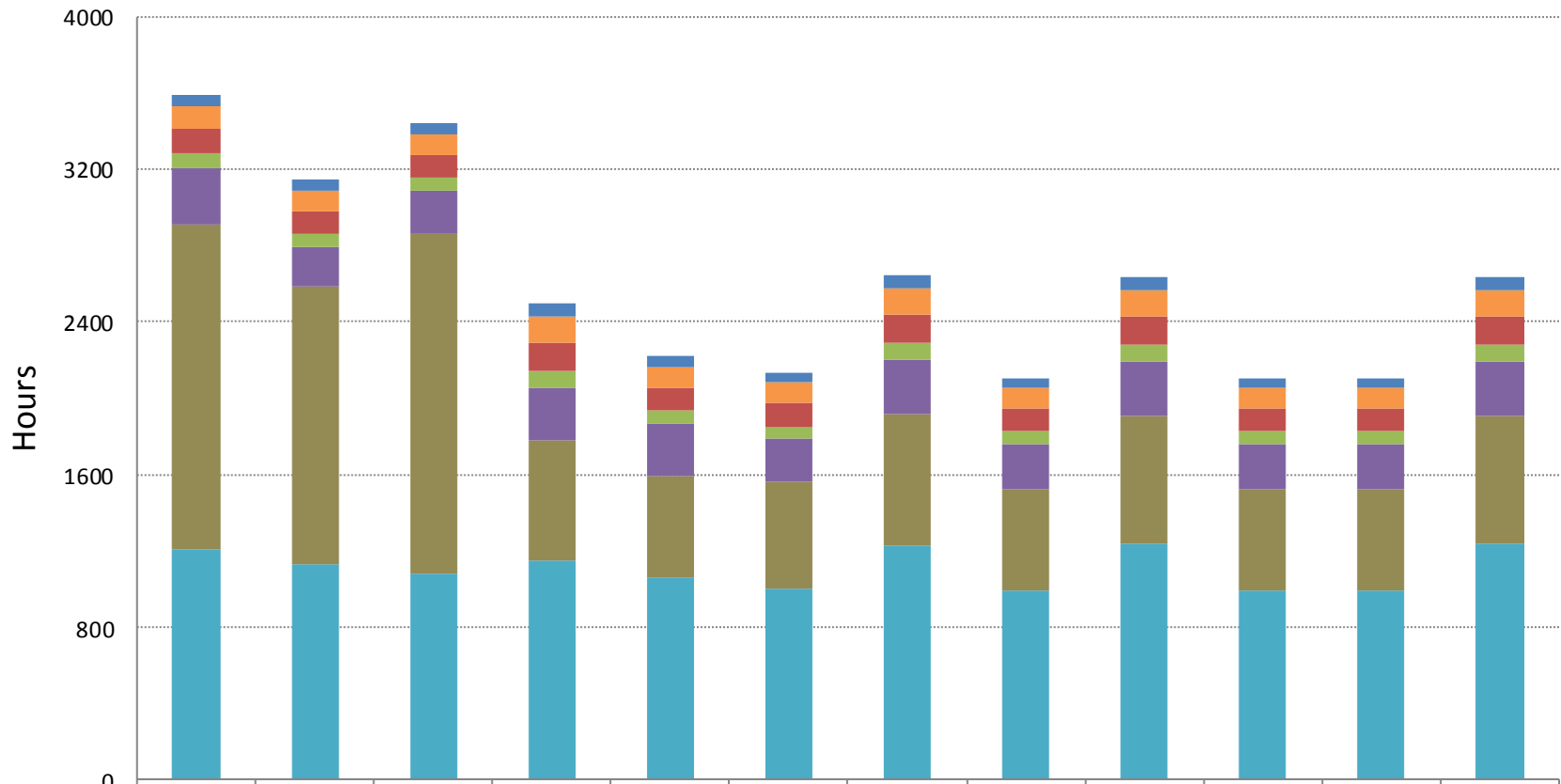


|                         | Jan    | Feb    | Mar    | Apr    | May    | Jun    | Jul    | Aug    | Sep    | Oct    | Nov    | Dec    |
|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| 2014 Abandoned          |        |        |        |        | 2696   | 5495   | 3934   | 7992   | 9919   | 20512  | 15331  | 6957   |
| 2014 Answered           |        |        |        |        | 47120  | 44659  | 48534  | 47314  | 50417  | 45773  | 37710  | 36977  |
| 2015 Abandoned          | 9,035  | 8,622  | 5,454  | 4,496  | 1,359  | 2,281  | -      | -      | -      | -      | -      | -      |
| Collections             | 10,101 | 8,650  | 8,472  | 7,241  | 6,303  | 5,696  |        |        |        |        |        |        |
| Bldg Moves              | 79     | 69     | 93     | 174    | 202    | 273    |        |        |        |        |        |        |
| Campaign Promos         | 752    | 661    | 717    | 764    | 839    | 1,044  |        |        |        |        |        |        |
| Billing Payment Opt     | 236    | 208    | 197    | 187    | 217    | 314    |        |        |        |        |        |        |
| Meter Reads             | 1,062  | 962    | 1,073  | 1,026  | 1,314  | 1,599  |        |        |        |        |        |        |
| Misc Maintenance        | 634    | 538    | 754    | 1,169  | 1,483  | 1,716  |        |        |        |        |        |        |
| Inquiry Transfer        | 660    | 594    | 598    | 738    | 1,726  | 2,091  |        |        |        |        |        |        |
| Credit Card Payment     | 3,599  | 3,452  | 3,921  | 3,545  | 4,246  | 4,730  |        |        |        |        |        |        |
| Move In Out             | 4,512  | 4,400  | 5,488  | 6,510  | 7,116  | 8,159  |        |        |        |        |        |        |
| Inquiry Zero Out        | 7,167  | 6,391  | 7,476  | 7,788  | 5,245  | 3,476  |        |        |        |        |        |        |
| Acct Inquiry            | 13,600 | 11,284 | 12,900 | 12,060 | 13,049 | 13,763 |        |        |        |        |        |        |
| 2015 Aggregate Forecast |        |        |        |        | 42,522 | 44,704 | 44,970 | 42,549 | 46,416 | 39,986 | 36,668 | 33,074 |

# Human Factors & Workload

# 2015 Off-Line Activity

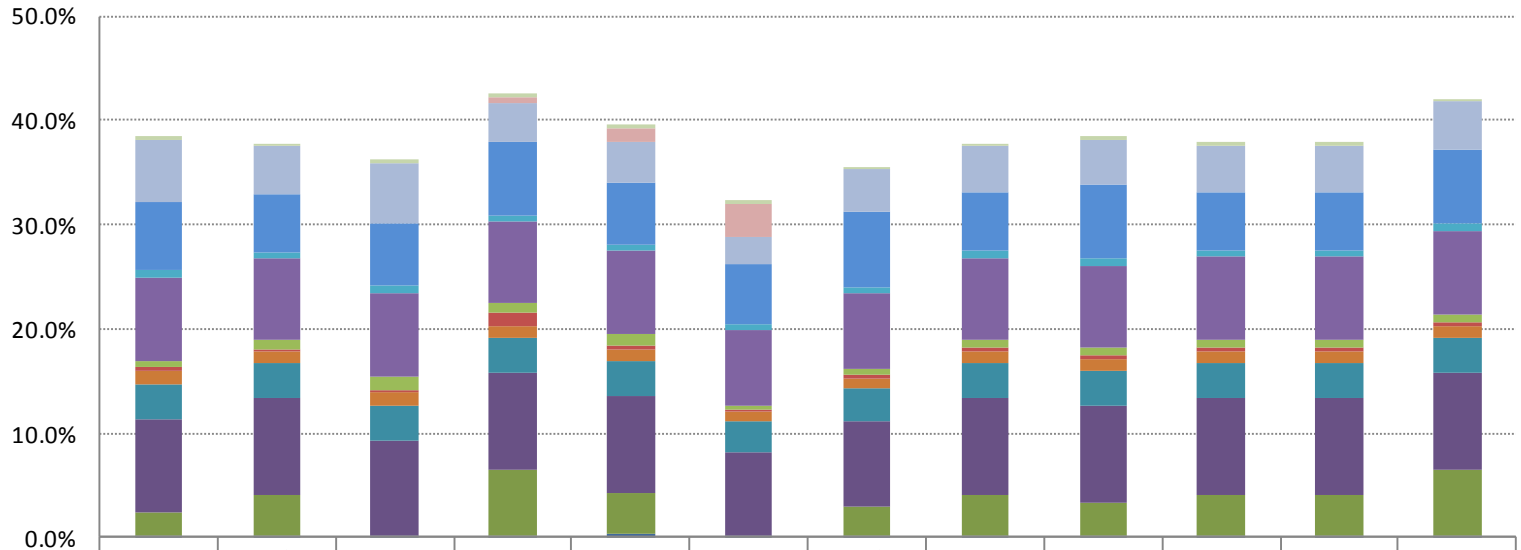
*Estimates in Progress...*



|               | Jan  | Feb  | Mar  | Apr  | May  | Jun  | Jul  | Aug | Sep  | Oct | Nov | Dec  |
|---------------|------|------|------|------|------|------|------|-----|------|-----|-----|------|
| Faxes         | 57   | 53   | 53   | 67   | 53   | 53   | 67   | 53  | 67   | 53  | 53  | 67   |
| e-Mail        | 119  | 110  | 110  | 138  | 110  | 110  | 138  | 110 | 138  | 110 | 110 | 138  |
| Returned Mail | 129  | 120  | 120  | 150  | 120  | 120  | 150  | 120 | 150  | 120 | 120 | 150  |
| MROs          | 72   | 67   | 67   | 83   | 67   | 67   | 83   | 67  | 83   | 67  | 67  | 83   |
| Outbounds     | 294  | 210  | 228  | 276  | 279  | 224  | 290  | 234 | 293  | 234 | 234 | 293  |
| Follow Up     | 1713 | 1458 | 1783 | 630  | 528  | 562  | 692  | 536 | 670  | 536 | 536 | 670  |
| Cash Office   | 1203 | 1127 | 1078 | 1152 | 1062 | 1000 | 1224 | 986 | 1233 | 986 | 986 | 1233 |

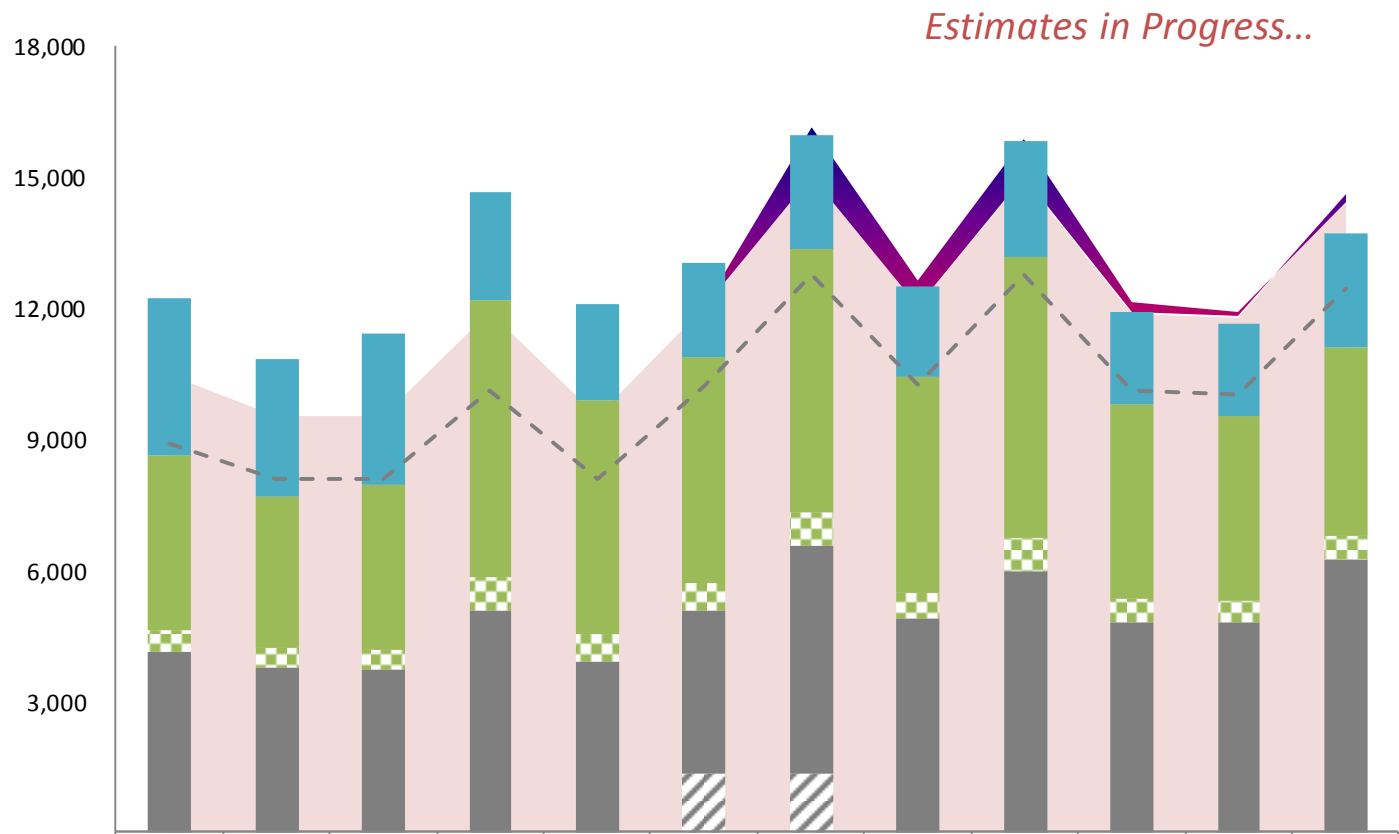
# 2015 Human Factors

*Estimates in Progress...*



|                          | Jan  | Feb  | Mar  | Apr   | May   | Jun   | Jul  | Aug  | Sep  | Oct  | Nov  | Dec  |
|--------------------------|------|------|------|-------|-------|-------|------|------|------|------|------|------|
| Pressing Necessity       | 0.3% | 0.3% | 0.3% | 0.3%  | 0.3%  | 0.3%  | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% | 0.3% |
| Union Business           |      |      |      | 0.64% | 1.23% | 3.11% |      |      |      |      |      |      |
| Work Assignment          | 6.1% | 4.6% | 5.8% | 3.7%  | 3.9%  | 2.8%  | 4.1% | 4.4% | 4.4% | 4.4% | 4.4% | 4.6% |
| Schedule Adherence       | 6%   | 5%   | 6%   | 7%    | 6%    | 6%    | 7%   | 6%   | 7%   | 6%   | 6%   | 7%   |
| SME & Help Desk          | 0.0% | 0.0% | 0.0% | 0.0%  | 0.0%  | 0.0%  | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Huddles                  | 1%   | 1%   | 1%   | 0%    | 1%    | 1%    | 1%   | 1%   | 1%   | 1%   | 1%   | 1%   |
| Paid Breaks              | 8%   | 8%   | 8%   | 8%    | 8%    | 7%    | 7%   | 8%   | 8%   | 8%   | 8%   | 8%   |
| Training                 | 0.4% | 0.9% | 1.3% | 0.9%  | 1.2%  | 0.3%  | 0.5% | 0.7% | 0.7% | 0.7% | 0.7% | 0.7% |
| Coaching                 | 0.4% | 0.2% | 0.2% | 1.3%  | 0.4%  | 0.2%  | 0.3% | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% |
| Family Leave             | 1.3% | 1.2% | 1.2% | 1.2%  | 1.2%  | 1.0%  | 1.0% | 1.2% | 1.2% | 1.2% | 1.2% | 1.2% |
| Sick Time                | 3.3% | 3.4% | 3.4% | 3.4%  | 3.4%  | 2.9%  | 3.0% | 3.4% | 3.4% | 3.4% | 3.4% | 3.4% |
| Vacation                 | 9.0% | 9.2% | 9.2% | 9.2%  | 9.2%  | 8.1%  | 8.3% | 9.2% | 9.2% | 9.2% | 9.2% | 9.2% |
| Closed/After Hours       | 2.3% | 4.0% |      | 6.4%  | 4.0%  |       | 2.8% | 4.0% | 3.2% | 4.0% | 4.0% | 6.4% |
| Fire Drills & Tech Probs | 0.1% | 0.1% | 0.1% | 0.2%  | 0.3%  | 0.1%  | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% | 0.1% |

## 2015 Workload & Utilization Hours



|                         | Jan    | Feb   | Mar   | Apr    | May   | Jun    | Jul    | Aug    | Sep    | Oct    | Nov    | Dec    |
|-------------------------|--------|-------|-------|--------|-------|--------|--------|--------|--------|--------|--------|--------|
| Extra Hours Needed      |        |       |       |        |       |        | 1,119  | 569    | 894    | 225    | 122    | (197)  |
| Total Payroll Hrs       | 10,475 | 9,523 | 9,523 | 11,903 | 9,523 | 12,014 | 15,025 | 12,043 | 14,997 | 11,894 | 11,802 | 14,626 |
| TTP/Goal Hours          |        |       |       |        |       |        |        |        |        |        |        |        |
| Total Off-Line Workload | 3587   | 3145  | 3439  | 2496   | 2219  | 2136   | 2643   | 2106   | 2633   | 2106   | 2106   | 2633   |
| Phone Workload          | 4,022  | 3,488 | 3,783 | 6,344  | 5,326 | 5,167  | 6,024  | 4,934  | 6,444  | 4,441  | 4,232  | 4,322  |
| Erlang/IBC Hours        | 489    | 424   | 460   | 772    | 648   | 629    | 733    | 600    | 784    | 540    | 515    | 526    |
| Total Human Factors     | 4136   | 3,784 | 3,734 | 5,069  | 3,905 | 3,765  | 5,254  | 4,884  | 5,970  | 4,825  | 4,789  | 6,264  |
| Onboarding Hours        | -      | -     | -     | -      | -     | 1,330  | 1,330  | -      | -      | -      | -      | -      |
| Ideal Occupancy 85%     | 8,904  | 8,094 | 8,094 | 10,118 | 8,094 | 10,212 | 12,771 | 10,237 | 12,747 | 10,110 | 10,032 | 12,432 |

# Next Steps

- Present another monthly strategic presentation on Aug 27<sup>th</sup>, showing progress made from tactical meetings.
- Find correlations between:
  - Net Staff::Excessive Abandons
  - Extra Capacity Headcount::Occupancy rates
  - Extra Headcount Required::Net Staff Sweet Spot
- Begin assembling the LTP for next year

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