

## 2019 Human Numbers Workforce Management Service

**Overview:**

Workforce Management is the art and science of identifying the right number of people needed at the right time to meet service goals. Human Numbers uses a 19-point forecasting methodology that provides the necessary care and consideration to normalize trends from raw data to produce predictable and reliable forecasts. Our flexible scheduling methods are sensitive to the agent’s need for a work-life balance while respecting the contact center’s compliance rules. Our WFM Staffing Model clearly demonstrates the state of the contact center, how many people are needed to perform the work, when that hiring needs to occur, and when it can be safely postponed. We work remotely and provide our own equipment and software.

Human Numbers has significant experience developing Workforce Management processes and implementing them with focus on consistency of service, process, and culture. We combine real world experience with expert data analysis to provide actionable recommendations.

**Cost & Pricing (valid through December 31, 2019):**

We bill on a fixed price basis, providing you with a predictable cost for the work defined. Any changes to scope will be discussed and documented, and costs adjusted (up or down) accordingly. The term of this contract is month-to-month with a 30-day cancellation notice from either party. Our services are shown cafeteria-style, so you only pay for the services that are used each month

1. WFM Staffing Model, including one agent group (examples in Appendix B)	\$2,500/month
<i>Each additional Staffing Model</i>	\$1,000/month
2. Forecasted Volumes, Handles Times, and Required Base Staff for a single forecast group (examples in Appendix A)	\$2,000/month
<i>Each additional Forecast Group</i>	\$500/month
3. Optimized scheduling service for up to 20 agents	\$3,000/month
<i>Each additional agent</i>	\$30/agent/month
4. Time-Off Management, Tracking Service, and Real-Time Adherence system for up to 20 agents	\$2,000/month
<i>Each additional agent</i>	\$20/agent/month
5. WFM Health Check for a single group	\$995/each
6. Day Rate	\$1,500/day

We have extensive collaboration toolsets to work remotely. The Client pays all travel costs, so it only occurs when specifically requested. We will bill reasonable travel expenses with each installment. These expenses may include airfare, hotel (business class – Marriott, Hilton, etc.), rental car, taxi, mileage, meals and other general expenses for each day spent on site. Prior to any travel, we will provide estimated travel expenses for on-site visits.

### **Set-up and Configuration:**

Initial setup and configuration include collecting historical volumes, testing and publishing initial forecast drafts. We will also collect details from you about volume patterns, off phone activities, call center shrinkage, goals, performance against key metrics, and agent schedule preferences. We will focus on handle time analysis, off-phone activity, and ACD data collection and review information on your organization, processes and operations, and technology to ensure a baseline understanding of your environment. It is the client's responsibility to provide all historical data, assumptions, and service goals.

### **Working Remotely:**

Communication will repeatedly occur in three different ways:

- I. Passively through the data cleaning process - Each week we analyze your volumes for data anomalies, aberrations, spikes, holidays, special factors, and intervals that failed to meet service goals.
- II. Actively by publishing forecasts, optimizing schedules and reviewing plans each week. We are also able to dial in remotely to pull your historical reporting data if necessary.
- III. Cooperatively in the weekly tactical and monthly strategic meetings. We will be present via web conferencing and our availability will be flexible with you for these important conversations. We will be prepared to review the current forecasts and its performance and will identify the forecasting trends that will assist in generating helpful discussion about the forecasting factors. We will also show you any special schedule optimizations that we find to improve your net staffing.

### **Delivery Methods:**

In the spirit of keeping administration as simple as possible, we issue all external reports, forecasts, charts, and computer-generated communications with standard Microsoft Office Suite products, including Excel, Power Point, Word, and Outlook. Web conferencing services are provided from Human Numbers using GoToMeeting. File sharing occurs through Dropbox, or we can also provide a secure FTP site for file sharing and transferring. This site will include a password and User ID. Human Numbers uses a full range of collaboration tools to provide remote support including: FTP services, phone, e-mail, web conferencing with desktop sharing.

Human Numbers' systematic forecasting approach includes:

- I. Weekly Tasks
  - a. Receive the historical data report for phone and case volumes
  - b. Analyze the raw history, identify and store aberrant data into special data sets
  - c. Recompile volumes, handle time, and staff into groups at the enterprise level to update and refresh the time-of-day and day-of-week distributions
  - d. Compare recent trends with older trends, validating the patterns
  - e. Normalize ("clean") the data to account for any special holidays, or situational exceptions
  - f. Document the forecasting journal with notes from weekly data collection
  - g. Present these findings in a weekly tactical meeting
- II. Monthly Tasks
  - a. Measure the effectiveness of the current growth rate and make changes if necessary
  - b. Update recent trends and week-of-year/month-of-year distributions
  - c. Track monthly movement of handle time changes, noting variations
  - d. Allocate the forecast requirements into staffing requirements
  - e. Publish the results into standardized reports
  - f. Document the forecasting journal with notes from the monthly re-forecast
  - g. Develop forecast review information in charts and graphs, comparing forecast deviation as year-over-year changes
  - h. Present these findings in a monthly strategic meeting

In addition to the volume forecasts, Human Numbers will collect your contact center assumptions and reforecast these on a monthly basis with the WFM Staffing Model when requested. Examples of these reports are in Appendix B of this proposal.

## ACCEPTANCE & AGREEMENT

By signing below, I agree that I have read and agree to the terms of this agreement. Please email a signed copy to [tiffany@humannumbers.com](mailto:tiffany@humannumbers.com).

\_\_\_\_\_  
Signature, CLIENT

\_\_\_\_\_  
Signature, Human Numbers, L.L.C.  
4030 Orchard Way  
Milton, GA 30004

\_\_\_\_\_  
Printed Name

Tiffany LaReau  
\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

Owner  
\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

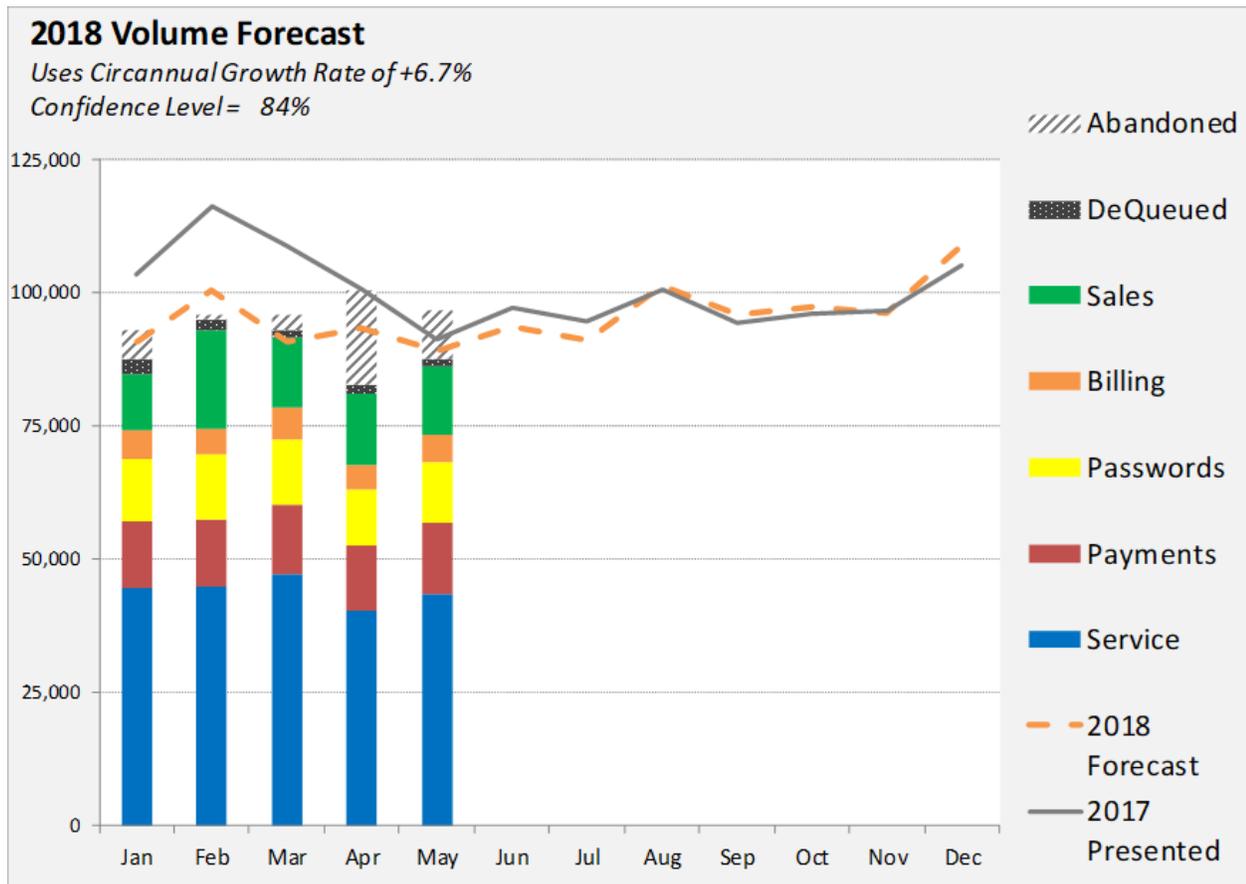
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Date

Your main contact for this work will be Tiffany LaReau, a Certified Workforce Planning Professional (received from the Society of Workforce Planning Professionals, SWPP.org) and an ICMI Certified Associate with 24 years of experience specifically devoted to workforce management. Human Numbers is categorized as a small, woman-owned business and is registered with SBA.gov and CCR.gov under CAGE# 5NVB7, DUNS# 828-961-693.

### **Tiffany LaReau**

Owner & Certified Workforce Manager  
Human Numbers, L.L.C.  
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Milton, Georgia 30004  
770/609-6565 Office  
404/368-3956 Cell  
[Tiffany@HumanNumbers.com](mailto:Tiffany@HumanNumbers.com)

## APPENDIX A: Basic Forecasting Service



**Figure 1: Monthly Volume Forecast**

This is a sample monthly volume report. It will include the forecasted and actual volumes, along with the original forecasting baseline and will be reviewed and re-forecasted on a monthly basis.

### Why is this important?

The volume forecast is the first step to determine the workload requirements. When we compare last month's actual volumes to the forecasted trend, it will give us the insight we need on to adjust and tune the re-forecast for next month.

Keeping a rolling, 12-month forecast at all times is critical step in a planning culture. It also provides insight into the current forecasting method being used, that method's forecast potential, and the confidence level.

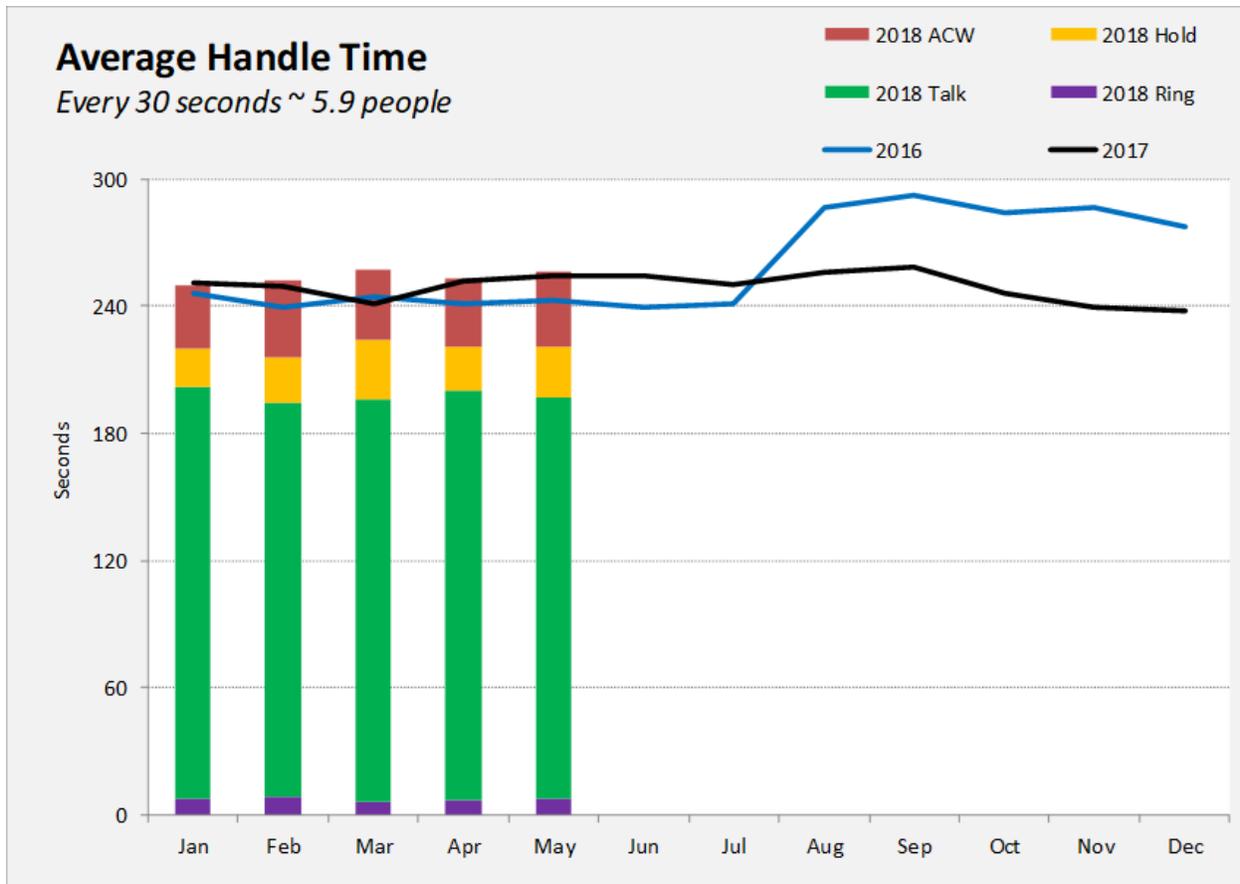


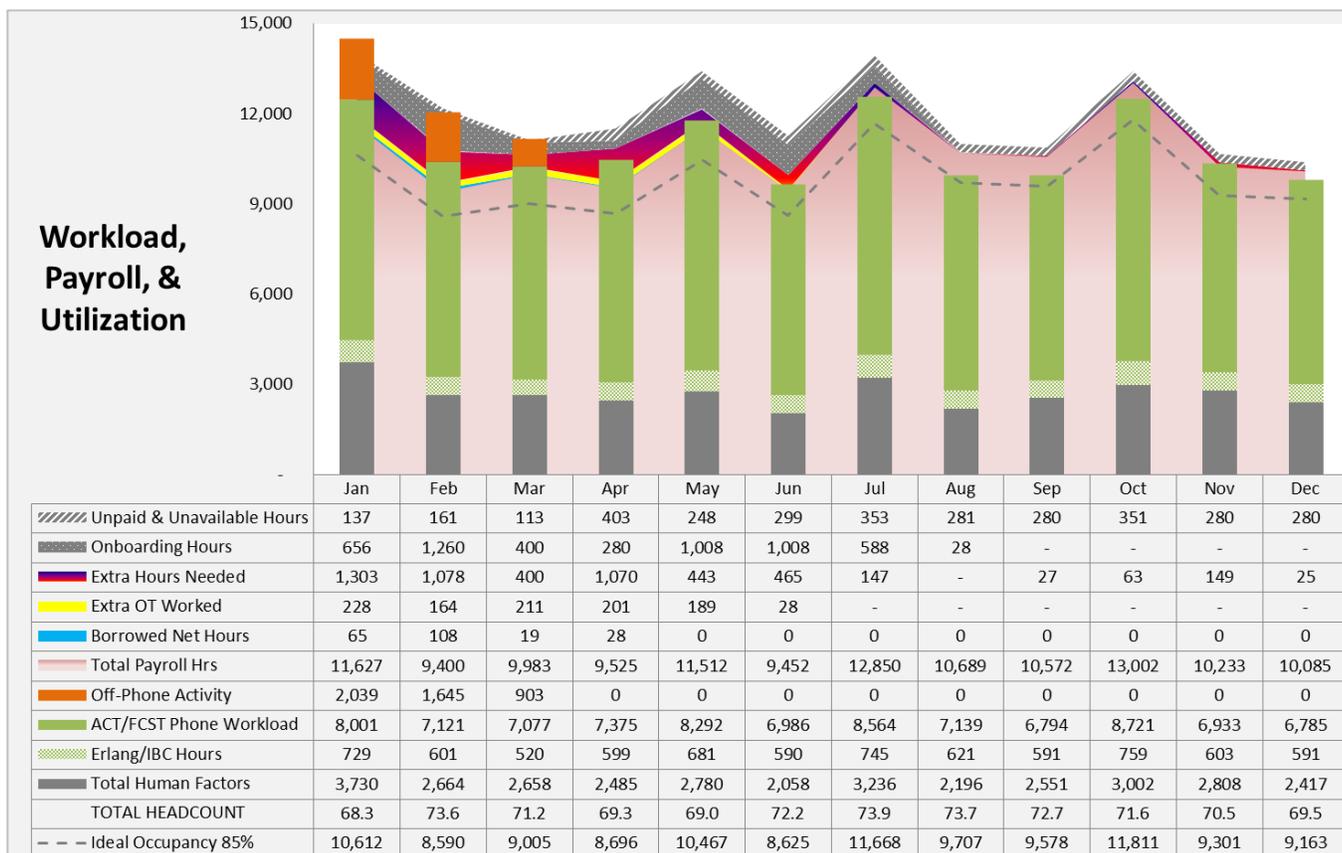
Figure 2: Handle Time Forecast

We review handle time once a week, and we reforecast this precisely for every day of the week and every interval each day. This is used with the volume forecast to produce the workload requirements.

### Why is this important?

When handle time goes up, workload increases, and required staffing headcount rises. It's also used to identify spikes where you may have learning curves to deal with. Breaking this down between Ring-Talk-Hold-ACW elements also allows you to identify changes in AHT behavior.

## APPENDIX B: Forecasts & WFM Staffing Model

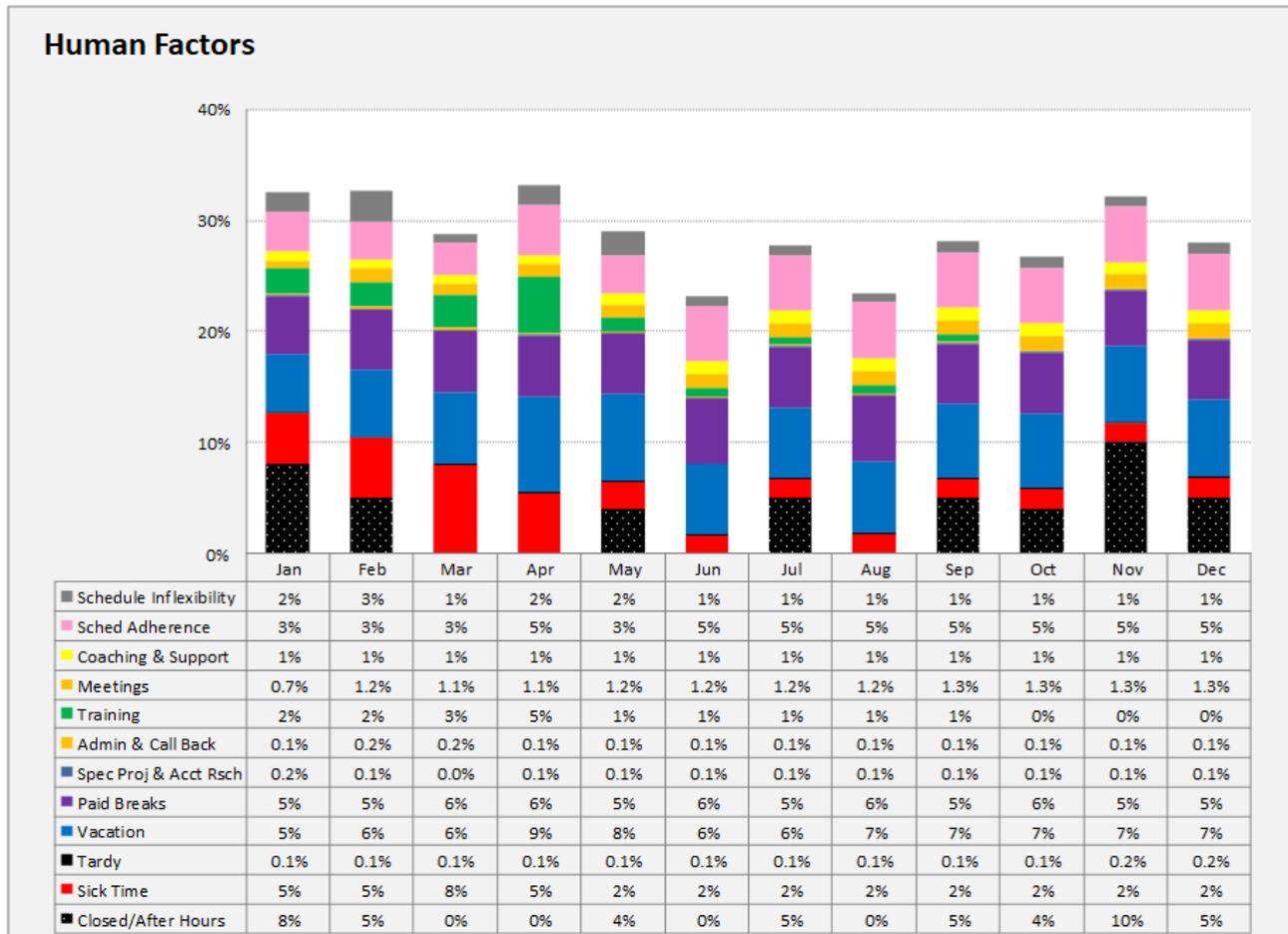


**Figure 3: Monthly Staffing Hours with Shrinkage**

This is the staffing hours projection chart. It includes your total paid hours (the pink area) and the bars reflect your phone workload, your back-office workload, and the % of time lost due to shrinkage, all converted into hours.

### Why is this important?

When the phone hours, back-office activities, and shrinkage hours overlaid with the paid hours, it visually shows where there may be extra capacity each month, which can be turned into training opportunities. It also shows the months where workload exceeds the staff you have, so you can make decisions about reallocating discretionary workload into other months when possible.



**Figure 4: Human Factors Graph**

This is the Human Factors chart, and it contains all of the time that you pay your agents to do something other than handle your incoming workload. Both discretionary and non-discretionary shrinkage is included, as well as presence and utilization hours, and it is this utilization calculation that converts the bodies-in-chairs requirements into the fully-realized total required staff numbers.

**Why is this important?**

The exercise of diligently capturing this time each month creates awareness of where the time is actually going, and this helps the contact center manage this in a responsible way. In addition, having a precise utilization measurement will allow us to show you the impact to your required staff in the event that you want to change your operating hours or your service goals.

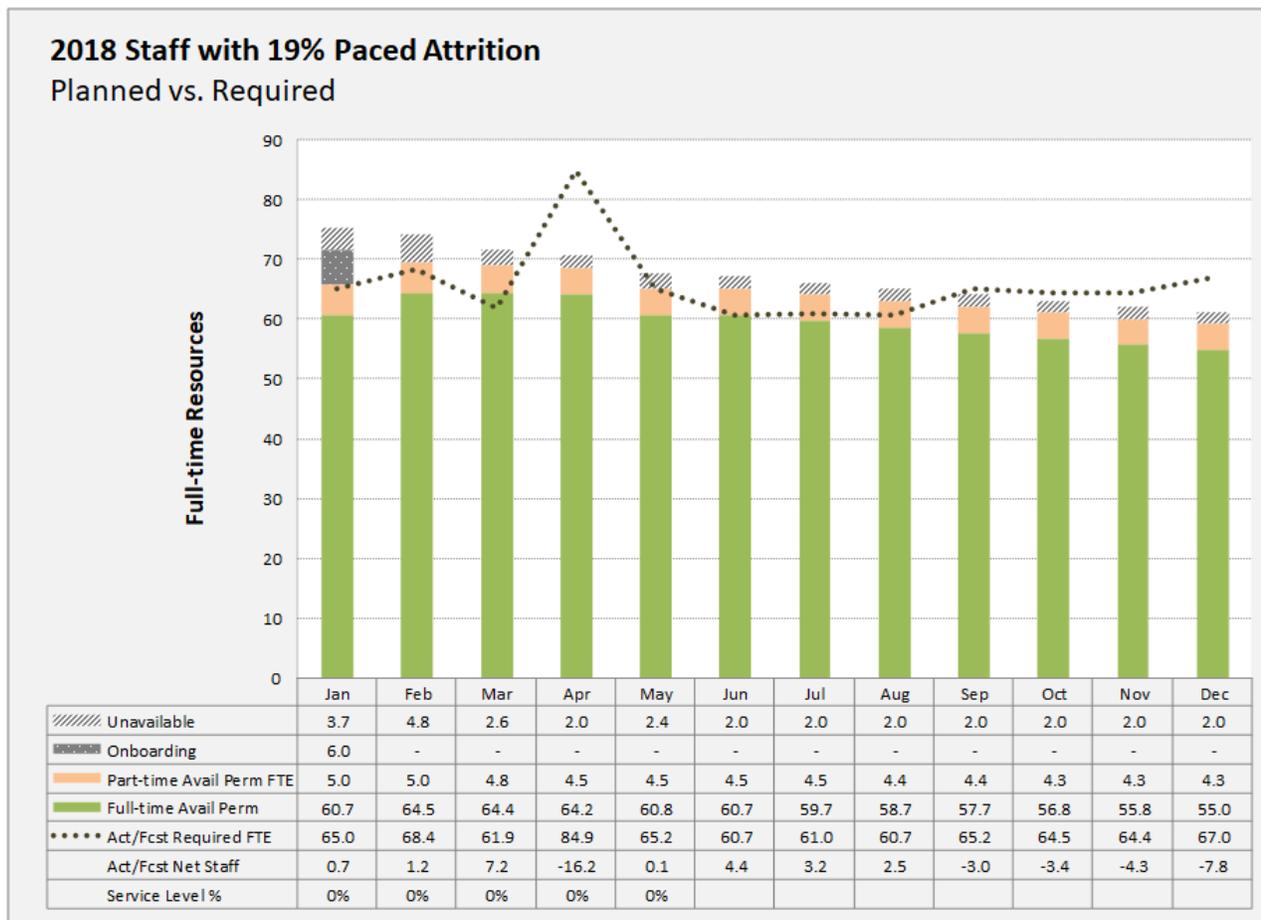


Figure 5: Required vs. Planned Staff

This is the staffing model chart. The required headcount line is shown along with the planned headcount to indicate when you are going to be overstaffed, understaffed, and perfectly staffed.

### Why is this important?

It will include suggestions on when to hire more headcount, and when to allow natural attrition to occur without rehiring right away. It also indicates where training headcount is already in place, and the historical service level achieved with the staff on hand.

## APPENDIX C: Terms and Conditions

- Description of Services.** Human Numbers agrees to provide services to **Company** (the "Client") which are described in Appendices A & B, attached hereto and incorporated herein by this reference (the "Services") in accordance with the terms and in support of the project described in this Agreement.
- Term.** Monthly invoices will be issued on or after the first business day of each calendar month for the previous month's work, unless otherwise requested by the Client. Payment terms are net-30, payable by check, P-Card, or electronic transfer. This service is provided month-to-month with a 30-day cancellation notice from either party.
- Intellectual Property.** Work Product includes, but is not limited to, the documentation, including all ideas, processes, specifications, flow charts, notes, outlines, models, prototypes, and other materials, in whatever form developed which Human Numbers conceives, creates, discovers or invents, while employed by Client, or has previously conceived, created, discovered or invented and are incorporated into any deliverables to Client.
- Independent Contractor.** The parties acknowledge and agree that Human Numbers is an independent contractor. This Agreement shall not create the relationship of employer and employee, agent, affiliate, a partnership, nor a joint venture between the Client and Human Numbers.
- Warranties and Indemnities.** Human Numbers warrants that the Services performed will be of a high quality and performed in a professional manner. The Services will meet and conform to the requirements agreed to by the parties. Human Numbers shall promptly make all corrections necessary to allow the Work Product to conform to the Client's requirements.
- Force Majeure.** Notwithstanding any other provision of this Agreement, no party to the Agreement shall be deemed in default or breach of this Agreement or liable for any loss or damages or for any delay or failure in performance due to any cause beyond its reasonable control.
- Entire Agreement.** This document contains the entire agreement of the parties regarding the subject matter described herein, and all other promises, representations, understandings, arrangements and prior agreements related thereto are merged herein and superseded hereby. The provisions of this Agreement may not be amended, except by an agreement in writing agreed upon by both parties.
- Notices.** All notices or other communications hereunder to Human Numbers shall be in writing and delivered to Tiffany LaReau, [Tiffany@HumanNumbers.com](mailto:Tiffany@HumanNumbers.com).
- Non-Disclosure.** Both parties agree to enter into a confidential relationship with respect to the disclosure of proprietary and confidential information including (but not limited to) pricing and revenue related information, performance results, business processes or strategies and any documents pertaining to the above.

**10. Client Responsibilities.** Employees play an active role in the success of the project. As such, they assume responsibility to ensure participation in meetings and agree to deliver requested materials in a timely manner. It is also understood that any delays or scheduling changes caused by them may affect timelines and overall project success and agrees not to hold Human Numbers responsible for costs incurred due to any such delays or changes.

<b>Task</b>	<b>Client's Responsibility</b>	<b>Human Numbers' Responsibility</b>
1. Provide Historical Data, Assumptions, and Goals	X	
2. Normalize build, and store historical patterns and seasonal trends		X
3. Create Forecasts and measure forecast potential and accuracy		X
4. Provide schedule compliance rules preferences, and human factors	X	
5. Generate Schedules and calculate Erlang Factors and schedule inflexibility		X
6. Publish Schedules to Outlook		X
7. Administer Schedules	X	
8. Review Forecasts, Schedules, & Staffing Model in Weekly Tactical and Monthly Strategic Meetings	X	X
9. Make Hiring Plan recommendations according to weekly projections		X
10. Execute Hiring Plan	X	
11. Set Up RTA System and Train Supervisors/Employees on RTA		X
12. Plan Meetings and enter pre-approved exceptions and absences		X
13. Enter unplanned exceptions > 2 hours duration (by end of next business day)		X
14. Monitor Real-Time Adherence	X	
15. Approve wait-listed time-off requests	X	

**11. Insurance.** Human Numbers shall maintain in full force during the term of this Agreement:

- a) Commercial General Liability Insurance with limits of \$1,000,000/\$1,000,000 aggregate
- b) Professional Liability Errors & Omissions Insurance with limits of \$1,000,000 per occurrence/\$1,000,000 aggregate

**12. Data Security.** Human Numbers enforces the proper use and management of all data and the systems used by all employees and ensures privacy and confidentiality of all information. All devices are secured with up-to-date virus protection and adequate password control. Any off-site or cloud-based service used is required to meet standard data security, encryption, and privacy rules. Human Numbers ensures that all safeguards comply with applicable data protection and privacy laws. Any found vulnerabilities will be immediately conveyed to all parties involved, and the proper corrective actions will be put into place to remedy and prevent any future security breach.