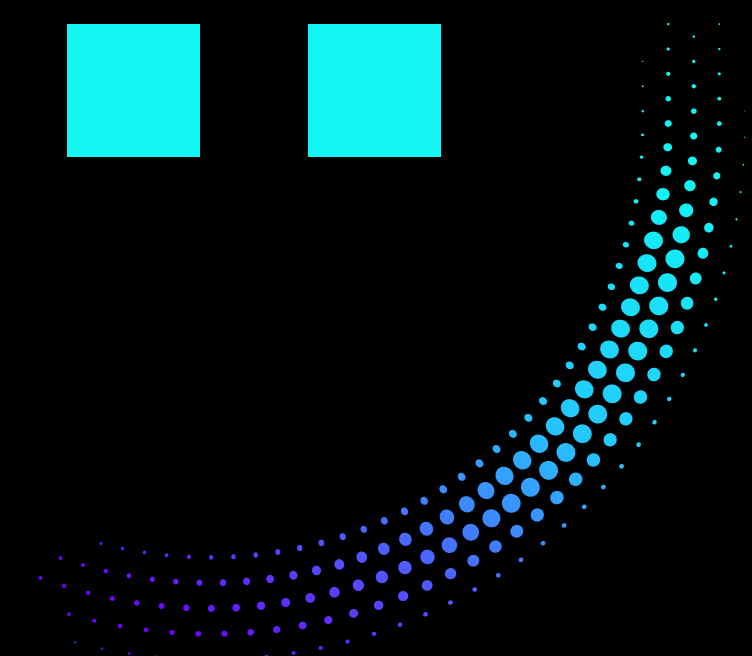# NICE WORKFORCE MANAGEMENT IN THE BACK OFFICE

The Right Tools
for Total Optimization

Make experiences *flow*

About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

www.nice.com

The back office environment poses several unique challenges for effective workforce management.

THE BACK OFFICE: NO LONGER AN UNMANAGED WORKFORCE

An effective back office is a key component of any coherent, enterprise-wide effort to improve processes and create the perfect customer experience. And for a healthy and productive back office, a best-of-breed workforce management system is becoming increasingly recognized as a necessity. Integrated with desktop analytics, such a back office solution also provides actionable insight into changing work volumes and actual employee productivity—and the capability to forecast accordingly.

According to DMG Consulting, a leading independent research, advisory and consulting firm, an interest in applying workforce management (WFM) principles to back office operations was the number one trend among the relevant managers in 2013 (WFM Report, April 2013). More recently, the Society of Workforce Planning Professionals (SWPP) found that the expansion of WFM concepts to non-phone channels was the top trend in its latest market surveys.

Back office groups are even hiring contact center workforce managers to bring WFM processes and tools into the back office. Among NICE customers, as well, automatic prioritization and distribution of work in the back office has been trending up in the past year. The reason is clear—a desire for higher quality service and greater efficiency, at a lower total cost to the organization.
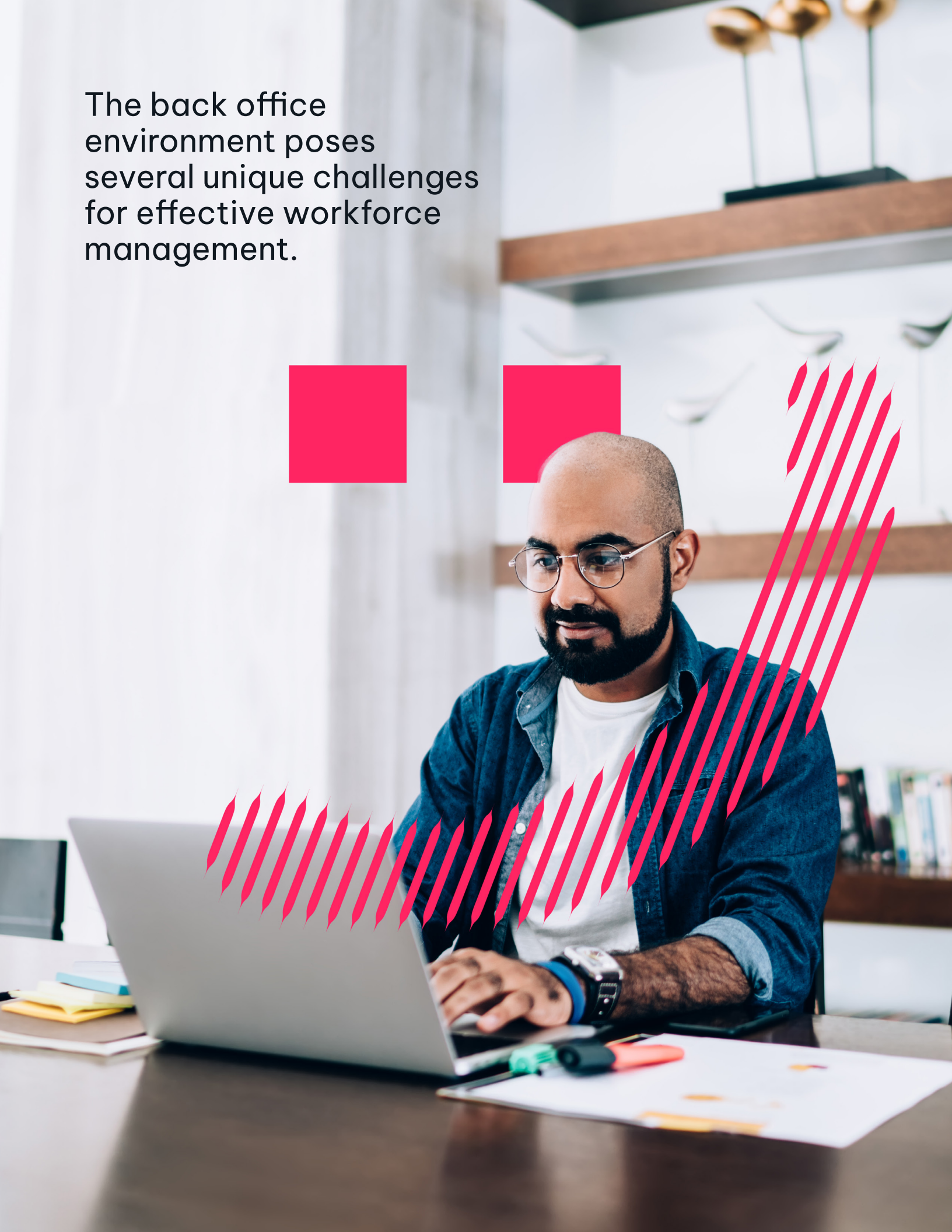
Adapting WFM to the Back Office

As the back office is a very different environment from the front office (contact center), with several unique challenges, the NICE Workforce Management solution adapts accordingly.

Forecasting takes into account complexities such as deferrable tasks and multi-step work items.

Intraday tracking looks at service level expectations and work backlogs (rather than the more immediate and easily measured customer abandon rates).
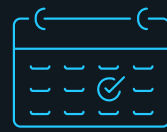
Scheduling focuses on the type of work each employee can undertake, and when, as opposed to simple interval start/stop times and headcounts.

Productivity data is collated from multiple sources and made coherent, overcoming the generally lower visibility into employee behavior in the back office.

Of all of these adaptations, the biggest challenge is gathering accurate and comprehensive data to support the WFM solution. Unlike a contact center's automatic call distribution system, which contains and centralizes most of the data needed for effective WFM, in the back office the data comes from multiple sources, including:

A data warehouse (if available), containing the necessary arrival, inventory and completed volumes data.

Workflow systems.
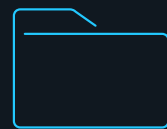
Back office processing systems.

Paper-based, offline work.

The Five Ways NICE Workforce Management Benefits Your Back Office

Designed to best meet the challenges of the back office environment, NICE Workforce Management is the only solution that will:

1 IMPROVE FORECASTING AND CAPACITY PLANNING

- Forecast work volume accurately, by measuring work received and handled by each employee.
- Long-term forecasts are displayed and edited in an Enhanced Personnel Planner.
- Using the Planner, forecast-based capacity plans can be created for all your different work groups and work types.
- Create plans that meet FTE requirements by incorporating overtime and its added cost.
- Create plans that include non-forecasted project hours that must be handled in specific months, and their associated costs.

2 REDUCE STAFFING COSTS WITH EFFICIENT SCHEDULES

- Flexible tools support any scheduling environment – from a back office staffed with full-time employees working 8-5 each day to a mix of full- and part-time staff, including work-at-home employees.
- Scheduling tools take into account the fact that much back office work is deferred and can be handled in a number of days.
- While it is not necessary to schedule every half-hour, every break and every seat (unlike in the front office), employee time off can be easily coordinated to ensure service levels are met.
- Optimize resource allocations by identifying and defining specific work types. You can loan out employees across groups and cross train as needed, tracking and adapting all schedules and staffing accordingly.
- For companies blending work between the contact center and the back office, a different and complex mix of employee hours can be scheduled to ensure that service levels for both the contact center and the back office are met. In addition, NICE WFM provides insights into the impacts caused by the mix of work being delivered to various groups. Now you can easily schedule employees to receive Contact Center calls or Back Office Work Types and calculate the expected impact. You can then plan accordingly to avoid missed SLA's caused by severe under staffing as well as cutting down on the amount of overtime needed by scheduling the right mix of people.
- Correctly managed staffing and scheduling can mean an FTE cost savings of 10-40%.

3 MANAGE BACKLOGS AND REDUCE OVERTIME

- Identify actual and projected backlogs, using work volume and scheduled open capacity data.
- Optimized resource allocations ensure effectively reduced overtime costs.
- With accurate forward-looking and current data, service level agreements are easily managed.

4 INCREASE EMPLOYEE PRODUCTIVITY AND EMPOWERMENT

- Employees and managers alike have greater visibility into their actual productivity data, increasing motivation and improving performance across the back office.
- Employees are given ownership of their schedule changes, trades and time-off requests, which creates more responsible and engaged employees.

5 INCREASE CUSTOMER SATISFACTION

- With accurate and comprehensive productivity data, as well as better time allocation, coaching and training are specifically targeted far more effective. The result is a more efficient back office.
- When service levels are consistently met, thanks to a more efficient back office, customer loyalty is increased.

Workforce Management in Real Time

NICE real-time activity monitoring (rtam) takes

NICE Workforce Management to the next level. Using this solution, NICE customers have Seen an increase in productive time of at least 10%.
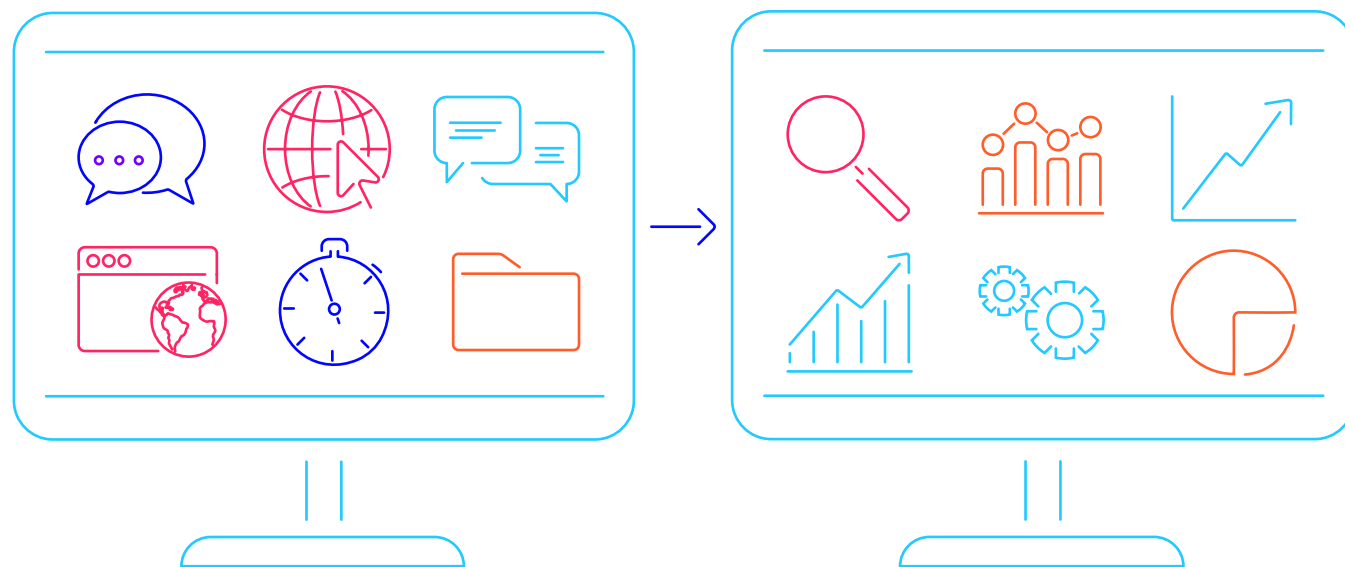
RTAM Desktop Application Analytics automatically tracks the applications and URLs each employee is accessing during the day, as well as monitoring for idle time (at a threshold you set) and locked screens.

RTAM Desktop Process Analytics provides employees the Desktop Work Tracker tool, through which they manually notify the system of what they are working on, when they started and stopped, when they paused one work item to address another or to take a break, and why.
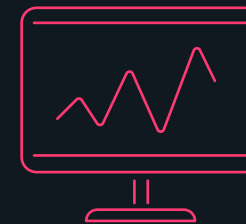
Monitored activities are categorized, according to your determination, as Productive Time, Non-Productive Time and so forth. The information is mapped to WFM schedule activity codes, providing detailed information for historical adherence and conformance reporting. The RTAM desktop analytics also provide the time and motion data needed Optimizing back office processes. This information is also used for accurately forecasting the number of required employees as you can now establish the exact average length of each work item.. And as your actual AHTs change, you can easily update those goals through the WFM Forecast Objectives screen.

Real-Time Alerts for Real-Time Adherence

Based on the desktop analytics, you can configure rtam to send alerts regarding any aspect of the monitored data to any stakeholder you designate. The status of all such alerts can be seen and sorted in NICE Workforce Management's real-time adherence tool, which parses the incoming data in several different ways:

The Adherence View focuses on employees who are not adhering to their schedule, as well as potentially providing additional RTAM information regarding desktop activity.

The State View focuses on those employees whose real-time monitoring data indicate their state has remained static for too long.
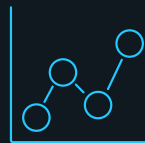
The Process View focuses on employees using the RTAM Desktop Work Tracker, providing insights into their work processes. A text alert can be automatically generated when a given process exceeds a predefined processing time threshold.

The Total View displays all of the RTAM data at once.

The Customized View allows you to decide what information to display and in what combination.
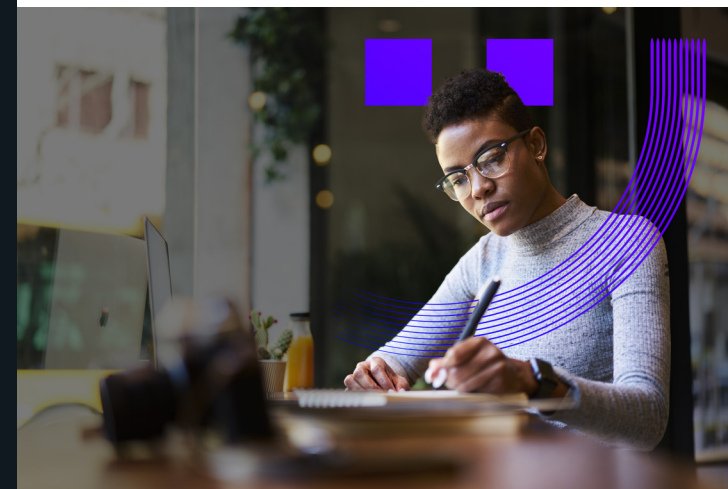
Offline Workforce Management

Common back office work – such as opening and scanning mail, faxing, filing, invoicing and more—is completely offline. As data on this kind of work is critical to effective forecasting and scheduling, NICE Workforce Management includes the Employee Work Journal interface.

In the Journal, each employee reports their off-screen work, either making updates throughout the day or entering a summary before they go home. This information is then combined with online historical data to create the most comprehensive work type forecast possible.

Putting NICE Workforce Management to Work

A leading business process outsourcing company, with 12 separate locations, adopted NICE workforce management and real-time activity monitoring to optimize its operations. The results were quick to follow:

Increased back office employee production time per day by 30%

Gained visibility into back office associate adherence

Automated schedule trades directly from employee desktops, increasing productivity and job satisfaction

NICE Workforce Management: for a Better Back Office

NICE Workforce Management is the back office productivity solution that transforms data into:

- ✓ Greater productivity and efficiency
- ✓ Dramatic reductions in operational costs
- ✓ Comprehensive and accurate forecasting and capacity planning
- ✓ Real-time responsiveness to meet service level goals

"The NICE team's technological knowledge and deep understanding of our back-office process, coupled with our workforce management and back office operations teams, were the key success factors in the project."

Supervisor