

AMAZON CONNECT WFM CAPABILITY OVERVIEW

MARCH 2023





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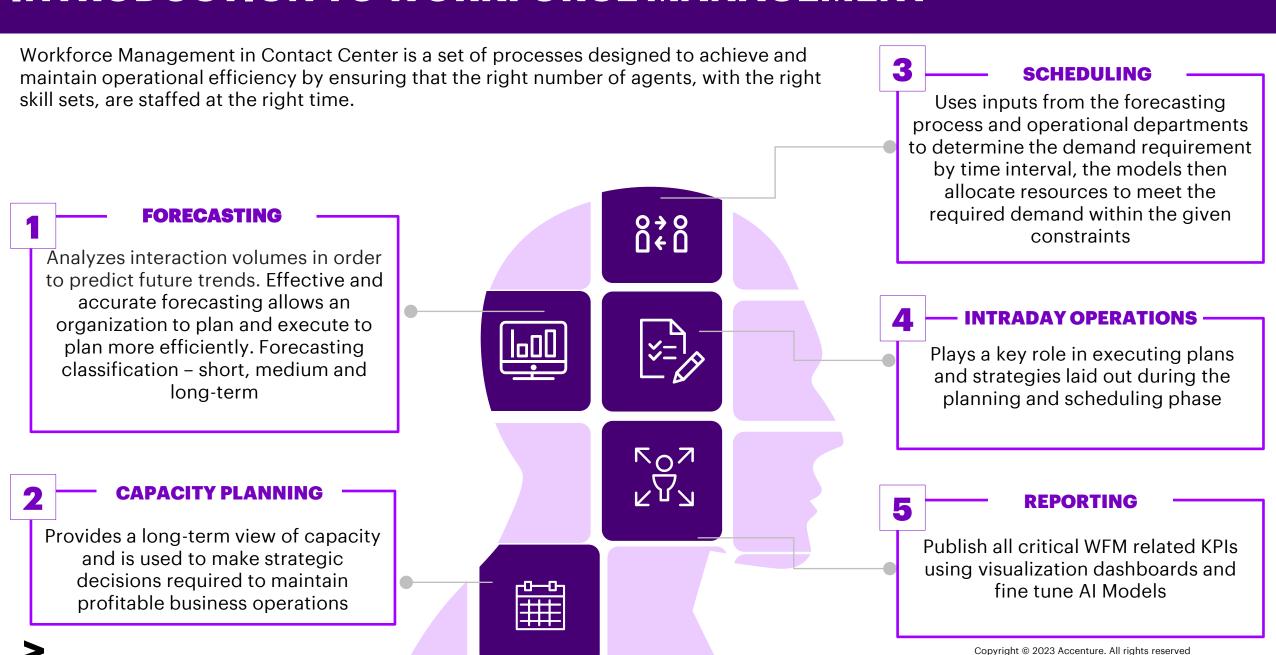
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INTRODUCTION TO WORKFORCE MANAGEMENT



INTRODUCTION TO AMAZON CONNECT WORKFORCE CAPABILITIES

Amazon connect launched their WFM base modules in Mar'22 and released the extended capabilities of WFM in Dec'22. That includes; Accurate ML - powered Forecasting, Efficient ML - powered capacity planning, agent scheduling, automate intraday agent request management capabilities. With one check of a box, get started with improving your demand planning.

CAPABILITIES



Forecasting: Use AI/ ML tailored for contact center business needs. Provide high accuracy forecast. Auto generate long term and short-term forecast



Capacity Planning: Available for Voice and Chat channels, long term forecast can be used to built the planners



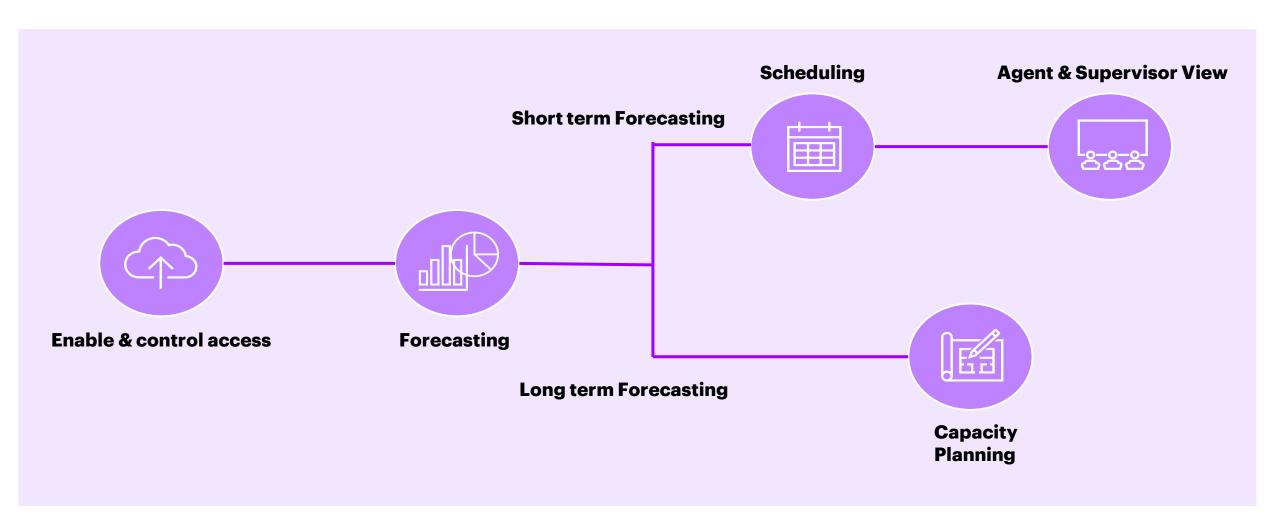
Scheduling: Tool will provide the number of agents required for each shifts, flexibility to add various rules





END TO END PREVIEW OF AMAZON CONNECT WFM CAPABILITIES

WFM can be enabled by one click in Amazon connect. Once enabled access is to provided for below capabilities:



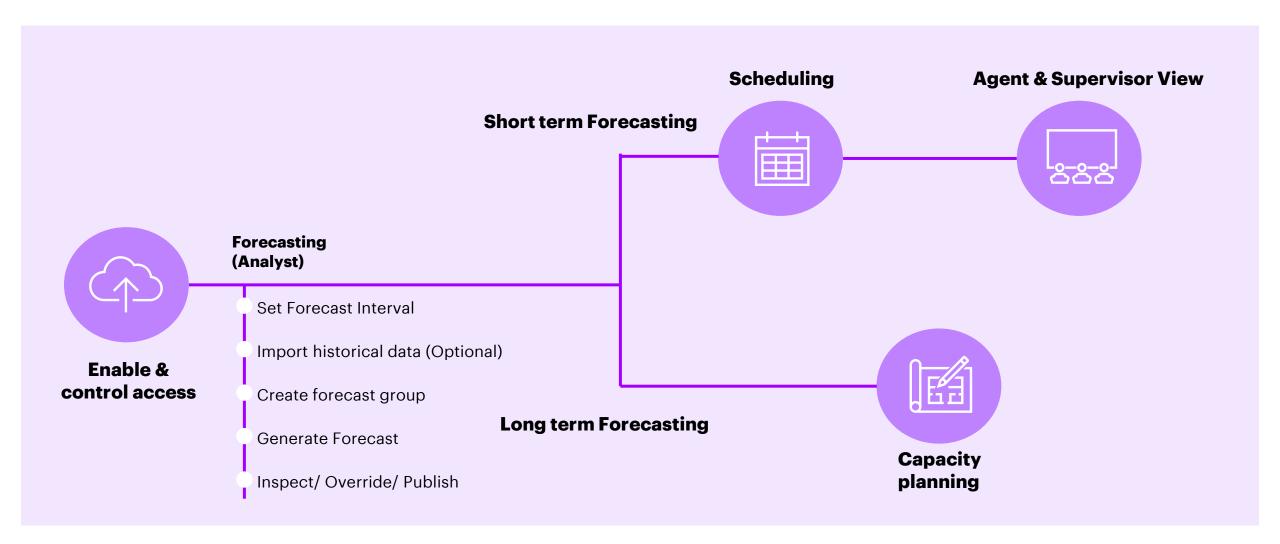


O1 FORECASTING



FORECASTING OVERVIEW

The forecasting capability lets you forecast the contact volumes and AHT of all the contacts coming in and gives you an accurate projection for the next 12 to 18 months.





FORECASTING PROCESS - 1/2

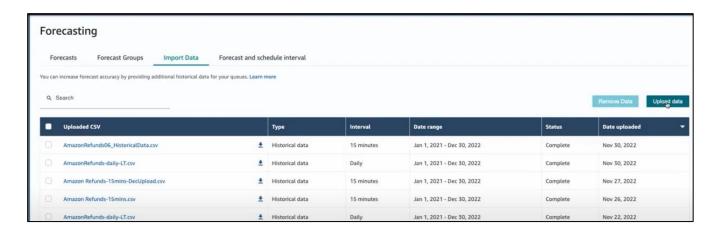
Forecast Interval

To generate a forecast, you first set the forecast interval, which is either 15 minutes or 30 minutes. If you set it to 15 minutes, it gives you
more granular control, and if you want to reset it, you can always contact Amazon.



Importing Historical Data

• New customers can upload data from their existing solution by filling in the type of channel, timestamp, data about the handle time and contact volume, and applying it. Once that is done, you can create forecast.



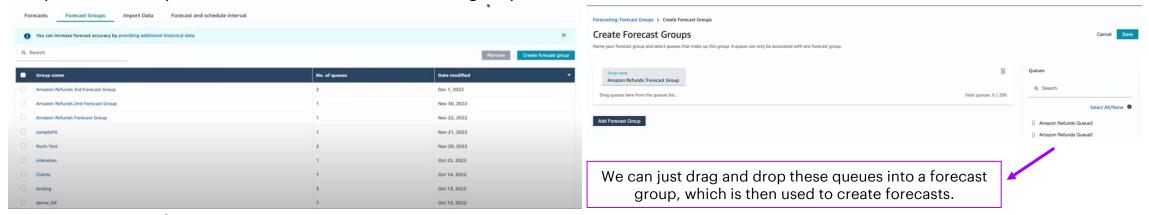


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FORECASTING PROCESS - 2/2

Creating Forecast Groups

- Forecasts are built by grouping queues together into a forecast group.
- One queue can only be associated with one forecast group.



Forecast Generation

- You create forecasts by picking a forecast group, selecting the type of forecast, and saving it. The short-term forecast gets automatically delivered every day, and the long-term forecast gets delivered every week.
- The computer forecast looks at multiple aspects to generate a very accurate forecast, and adjusts for shrinkage, seasonality, etc.
 The actuals are compared with the computer forecast every day.



- Choose the forecast type. Amazon Connect creates a forecast for each type you select.
- Long term forecasts are used for capacity planning. For example, how
 many Full Time Equivalent (FTE) agents you need to hire in the next few
 months, quarter, and year.
- **Short term** forecasts are used for scheduling agents and interval level agent headcount estimation.

FORECASTING OUTPUT

Compare the published forecast with the actuals, look at the prior year, and look at the variance to make sure that you're building the right accurate forecast.



Long-term Forecast

Short-term Forecast



Interval level Forecast

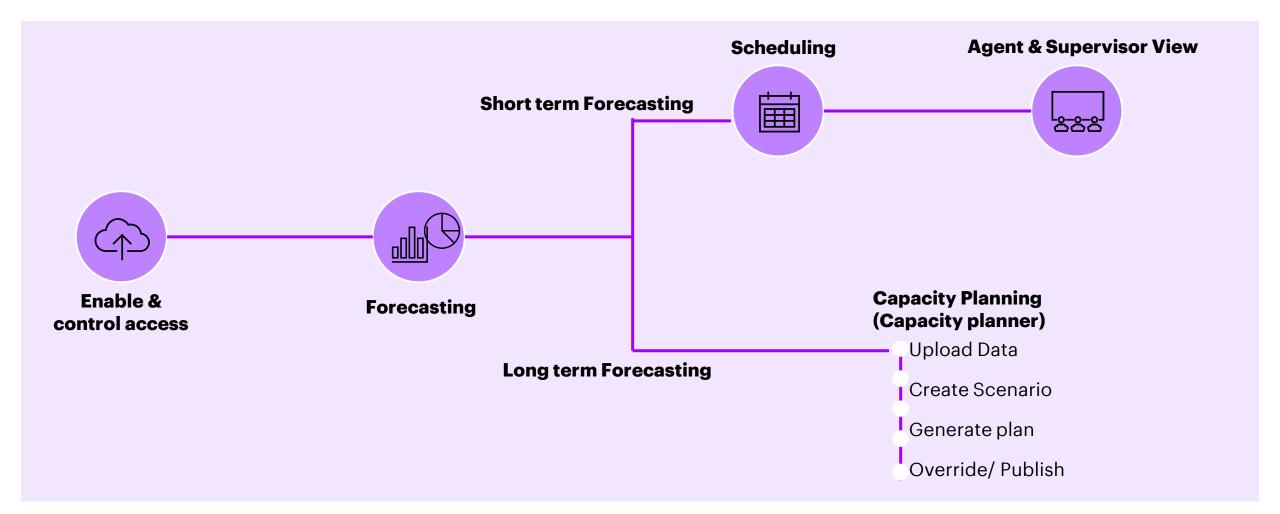
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CAPACITY PLANNING



CAPACITY PLANNING OVERVIEW

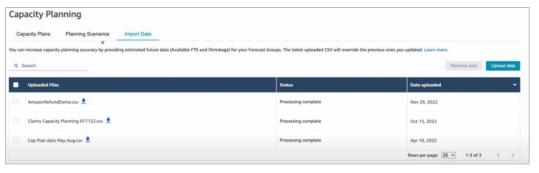
Capacity planning to estimate how many full-time equivalent (FTE) agents are needed to be hired to meet service level goals, based on long-term forecasts. Conduct "what if" analysis to improve service level targets, then share with HR, finance, and training to facilitate long-term strategic resource planning, thus automatically reducing operational overhead.



CAPACITY PLANNING PROCESS – 1/2

Upload Data

• The capacity planning module helps to deliver long-term strategic capacity plans by looking at all the historical data, at the agent, shrinkage, time out of work, and even in-office shrinkage. Additional data can also be uploaded if needed.

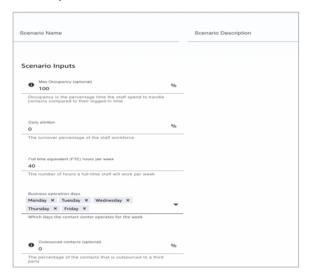


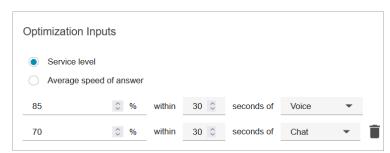
Create Scenario

• Multiple scenarios can be created to try how much capacity is required to achieve the service level targets. So, optimization goals, service level targets, and average speed of answer can be setup.

A scenario has two parts -

- Scenario inputs The maximum occupancy, daily attrition, FTE hours per week. For example, the data can be entered with best-case scenarios (everyone is at work) or worst-case scenarios (many people are out sick)
- **Optimization inputs-** The service level or average speed of answer (ASA). For example, 85% of calls are answered within 30 seconds of entering the queue.

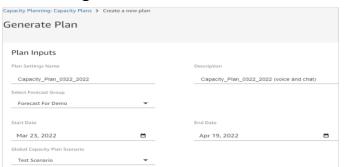


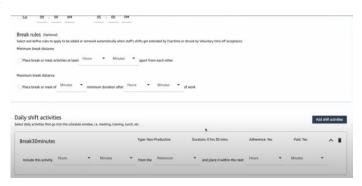


CAPACITY PLANNING PROCESS – 2/2

Generate Plan

- After creating a scenario, a capacity plan can be created.
- Provide the plan name, description, forecast group (which has published long-term forecasts), start/end date, and plan scenario.
- Plan generation takes 5-10 minutes

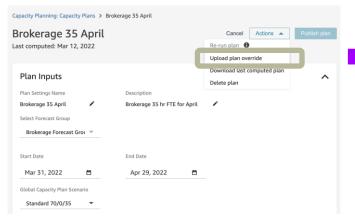


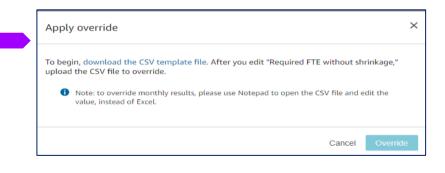




Override/Publish

• Upload a .csv file that overrides the Required FTEs (without Shrinkage) data in the Plan outputs section of a capacity plan. Re-run the plan with revised scenario or start/end date, override required FTEs, download plan output as CSV file and publish plan





| 1 | А | В | С | D | |
|----|--|----------------------|-----------------------|-----------------------|--|
| 1 | Metrics | Mar 5 - Mar 11, 2022 | Mar 12 - Mar 18, 2022 | Mar 19 - Mar 25, 2022 | |
| 2 | Available FTEs | 102 | 124 | 126 | |
| 3 | Forecasted Average Handling Time (AHT) | 173 | 173 | 173 | |
| 4 | Forecasted Contact Volume | 51719.13403 | 54303.16284 | 53931.54199 | |
| 5 | Forecasted Occupancy % | 64% | 63% | 62% | |
| 6 | Required FTEs (without shrinkage) | 99 | 103 | 103 | |
| 7 | Required FTEs (with shrinkage) | 116 | 128 | 128 | |
| 8 | Required OT% (-VTO %) | 14% | 3% | 2% | |
| 9 | Gap between available FTEs and required FTEs | -14 | -4 | -2 | |
| 10 | Gap % | -14% | -3% | -2% | |



CAPACITY PLANNING OUTPUT

Using the published long-term forecasts together with planning scenarios and metrics such as maximum occupancy, daily attrition, and full-time equivalent (FTE) hours per week as the input, you can then use the capacity planning feature to predict how many agents are required to meet your service level target for a certain period. It creates a long-term capacity plan that you can share with stakeholders.

The output metrics include:

- Required FTEs with & without shrinkage
- Forecasted Occupancy
- Available FTEs
- Gap%,
- Required OT%
- Required VTO%

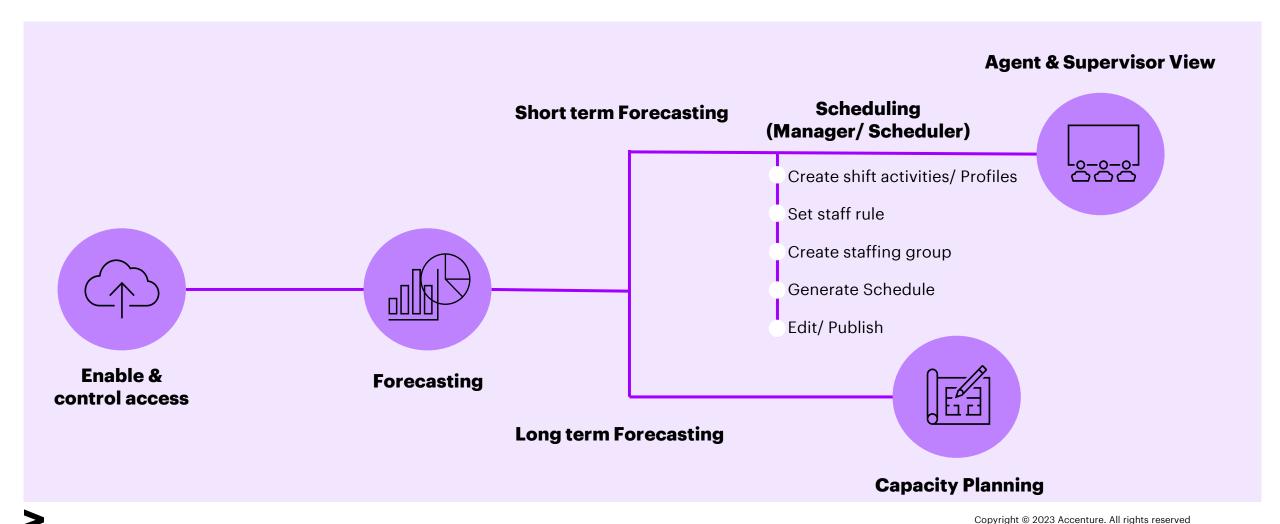
| Plan Outputs | | | | | | | | | |
|--|----------------------|-----------------------|-----------------------|----------------------|---------------------|----------------------|-----------------------|-----------------------|--------|
| Metric | Mar 4 - Mar 10, 2022 | Mar 11 - Mar 17, 2022 | Mar 19 - Mar 25, 2022 | Mar 26 - Apr 1, 2022 | Apr 2 - Apr 8, 2022 | Apr 9 - Apr 15, 2022 | Apr 16 - Apr 22, 2022 | Apr 23 - Apr 29, 2022 | Apr 30 |
| Forecasting Inputs 6 | | | | | | | | | |
| Forecasted Contact Volume 6 | 51719 | 54303 | 53932 | 53228 | 52421 | 47114 | 51085 | 51124 | |
| Forecasted Average Handling Time (AHT), seconds | 173 | 173 | 173 | 174 | 173 | 174 | 175 | 176 | |
| Outputs 1 | | | | | | | | | |
| Required FTEs (without Shrinkage) | 99 | 103 | 103 | 102 | 100 | 91 | 99 | 99 | |
| Forecasted Occupancy % | 64% | 63% | 62% | 63% | 63% | 62% | 62% | 63% | |
| Outputs with additional input 6 | | | | | | | | | |
| Required FTEs (with Shrinkage) | 116 | 128 | 128 | 126 | 124 | 112 | 122 | 123 | |
| Available FTEs | 102 | 124 | 126 | 126 | 127 | 126 | 122 | 127 | |
| Metrics calculated from available FTE input 1 | | | | | | | | | |
| Gap between available FTEs and required FTEs | -14 | -4 | -2 | 0 | 3 | 14 | 0 | 4 | |
| Gap % | -14% | -3% | -2% | 0% | 2% | 11% | 0% | 3% | |
| Required OT % | 14% | 3% | 2% | 0% | 0% | 0% | 0% | 0% | |
| Required VTO % | 0% | 0% | 0% | 0% | 2% | 11% | 0% | 3% | |

O3 SCHEDULING



SCHEDULING OVERVIEW

Scheduling generates individual agents' schedules based on short-term forecasts, shift patterns, and schedule rules and policies. Schedules are visible to agents in the Amazon Connect agent workspace and accessible to supervisors to view and make schedule adjustments in real time.



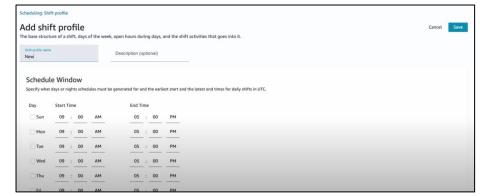
SCHEDULING PROCESS - 1/2

Creating Shift Activities/Profiles

- To create a schedule, shift activities should be known, which are things that an agent does during a shift. There are three types activities: productive activities, nonproductive activities, and time-off activities.
- Track adherence by activity, so that tracking is not need for the whole shift. Whether an activity is paid or not can be tracked, so that total paid hours of the agent are known.

In shift profiles define the structure of a shift, including the days of the week the agent would work, the time of the day the agent work, and more.

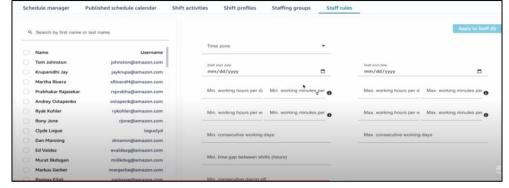




Set Staffing Rules

• Use staff rules to specify details for individual agents and supervisors, such as their local time zone, start and end dates, and contract

details.



SCHEDULING PROCESS - 2/2

Creating Staffing Groups

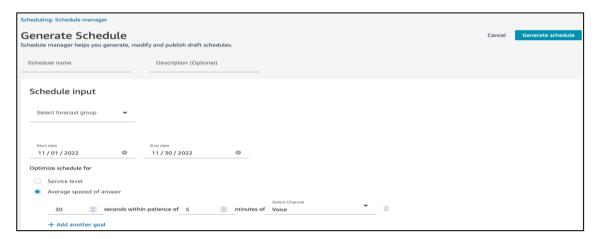
- Staffing groups are based on LoBs and org structure, and multiple staffing groups can be combined to a forecast group. A shift profile can be assigned to a staffing group when a schedule is created.
- · Set staffing rules for specific agents, for ex, labor rules, working hours, etc.

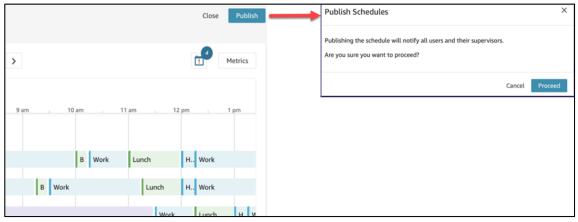
Generate Schedule

- Amazon Connect is designed to generate the least number of shifts for agents based on the forecasted demand pattern and configured constraints to hit the optimization goal.
- After you create shift activities, shift profiles, staffing groups and staffing group rules, you can generate a schedule.

Edit/Publish

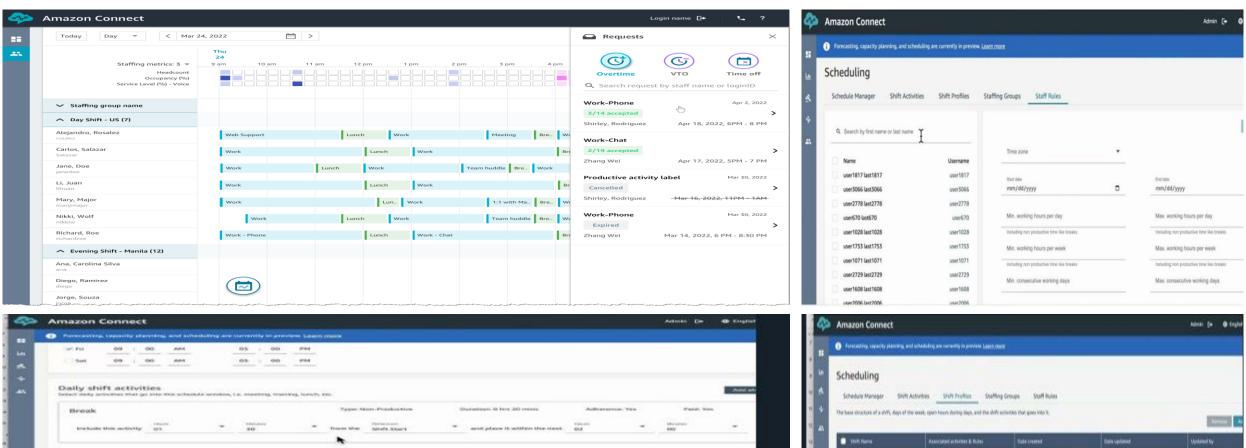
- Edit the schedule if needed
- · Once satisfied with schedule, Publish it





SCHEDULING OUTPUT

Using the short-term published forecasts together with shift profiles, staffing groups, human resources, and business rules, the new scheduling feature creates efficient schedules that are optimized for a service level or an average speed of answer target. Schedulers can review and, if needed, edit the schedules. Once they publish the schedules, Amazon Connect notifies supervisors and agents in the relevant staffing groups that a new schedule is available



Apr 30, 2013

Hw 7, 3022

ngth

Mai 1, 2022

Mar 7, 2033

Brotherage Day Shifts

A activities, à rules

3 activities, 5 roles

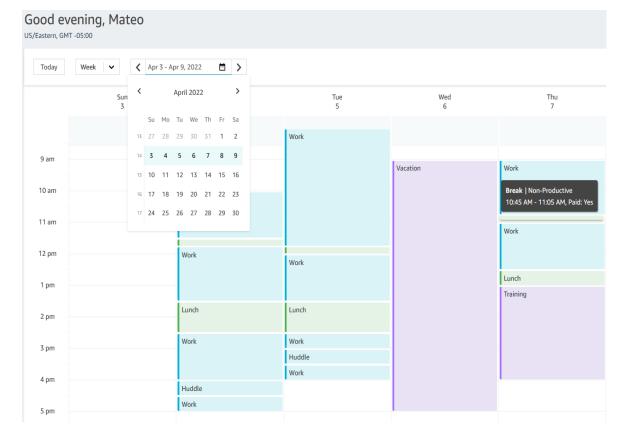
SCHEDULING VIEW

Scheduling now supports intraday agent request management, offering agents overtime or voluntary time off. When things need to change, Amazon Connect makes real-time schedule adjustments with the help of ML, following business and labor rules. Supervisor & agent can view schedules in Amazon Connect. Schedules are shown in local time zone set in the staff rule.

Supervisor View

Schedule Calendar **⊟** > Coct 4, 2021 Mon CustomerSuccessTeam (2) E, Ahmed _Agent, pebrito ↑ Traditional_Accounts-Manila (1) Agent 14, Traditional Work Work Work ↑ Traditional-Accounts-Boston (5) Inkwood, Macie Work Break-15... Work DemoAgent0 GammaTest, GammaTest GammaTest Flame, Marvin D Work Work Rubble, Missouri D Work Work DemoAgent2 Wattle, Rock D Work Work

Agent View



AMAZON CONNECT WFM CAPABILITIES - ADVANTAGES AND CONSIDERATIONS

ADVANTAGES



ML Based forecasting & Planning



Setup WFM Solution in just a few clicks



Easy to configure, implement, utilize



No minimum guarantee, longterm commitments, or upfront license charges. Pay only for what you use, start your POC

CONSIDERATIONS



Available for only Voice and chat



Concurrency isn't part of planning for chats



Abandon % KPI is unavailable to consider while planning



24 hours are required to import forecast

CAPABILITY NETWORK SONG – WFO CONTACTS



ARJUN BALARAMAN
Amazon Connect - Capability Lead
arjun.balaraman@accenture.com



SUBRAMONIAN KRISHNA
WFO- Capability Lead
subramonian.krishnan@accenture.com



KARTHICK KANNAN
WFO- Capability Lead
karthik.g.kannan@accenture.com

CN SONG Leadership Team – is organized around markets and nodes with a strong foundation of functional expertise



SANJAY DAWAR
Global Lead,
CN Song
sanjay.dawar@accenture.com



JAYESH PANDEY
Growth Markets, & India Node
CN Song
jayesh.pandey@accenture.com



MANOJ HINGORANI
North America Lead
CN Song
manoj.hingorani@accenture.com



PRAJWAL RAMACHANDRA

North America,
CN Song Service Lead
prajwal.ramachandra@accenture.com



VIVEK OHRI
Growth Markets,
CN Song Marketing Lead
vivek.ohri@accenture.com



MONICA FRIGERIO
Europe Lead,
CN Song Commerce & Sales Lead
monica.frigerio@accenture.com



<TBD>CN Song Growth & Product Innovation



JAVIER GONZÁLEZ BOIX
North America & BA Node Lead
CN Song
j.gonzalez.boix@accenture.com



SANTHOSH NATARAJANGrowth Markets,
CN Song
santhosh.natarajan@accenture.com



UMANG PATEL

North America,

CN Song

umang.patel@accenture.com



ROHAN RAMSINGHANI
North America,
CN Song
rohan.ramsinghani@accenture.com



SHIVI SHELLEY

Growth Markets,

CN Song

shivi.shelley@accenture.com

Thank You

