Business Case: Call Scheduling Optimization

Summary

The Challenge

Call scheduling is a manual process from start to finish that involves data entry, workforce planning and goal assignment. The margin for error is thin. While the week is scheduled in advance, unforeseen changes often cause the entire call scheduling process to be repeated.

Call goals are the secondary but equally important part of the scheduling process. Any time there is an impact to scheduling, call goals must be recalculated manually (a minimum of two times per week).

The Idea

Call scheduling / workforce planning is a common function for all call environments. Is there a product that automates this process?

The Solution

Discover, evaluate and implement an existing third-party application or add-on that fits our business needs and reduces the time commitment required to ensure accurate scheduling / goal assignment

Background Information

Call scheduling is a required weekly function of the Marketing Call Team. Without it, Specialists would not have the ability to know which leads / producers are within a campaign, who to call, and how much work they should complete. Successful call scheduling provides the Marketing Call Team with two invaluable tools: the **call funnel**, a customized report within Salesforce (SFDC) that shows each Specialist their assigned work for the week and the **weekly call schedule**, which outlines priorities, goals, and offline activities (if applicable). Both are typically populated Monday morning. Both tools are used on a daily basis to keep track of their weekly expectations and performance.

The process to provide the Call Team with what they need is manual from start to finish. The call schedule is manually maintained, the funnel is maintained by manually exporting information from Salesforce to re-import it back into Salesforce. Scheduling issues can arise by keying a single character incorrectly or selecting an incorrect checkbox. To add to the growing time commitment, failsafe steps further slow the process down as work must be double and triple checked before proceeding to the next step. A mistake early can grow into a larger error quickly.

Information exported (to be reimported) must be saved and stored for future use. Advanced

Excel formulas are required to utilize information from past spreadsheets when needed.

Call types cover the variety of calls handled by the Call Team. Currently, there are 8 call types. These 8 call types “roll up” into 3 **call groups**, which determine their forecasted talk time:

- Call group 1: 00:02:30
- Call group 2: 00:06:00
- Call group 3: None*

**Call Group 3 includes inbound calls, registration support, agents dialing the Specialist’s number directly, Specialists calling their voicemail, etc. These cannot be accurately forecasted, but credit is still given for handling the call.*

Using the number of calls to be assigned, the number of hours available, the forecasted talk time for each call group and the priorities of the campaigns, the scheduling and goal creation process can begin.

Call goals are included with the call schedule so the Specialist knows their daily call goal requirement and their expected weekly call completion. This is calculated based off their available hours, the number of calls assigned and the type of calls being assigned. Whenever scheduling is modified, call goals must be modified as well to ensure accuracy.

Once the schedule and goals are created, they must be verified. Any adjustments made require a verification step after. Once verified as accurate, the process of “filling the funnel” begins. Manually uploading spreadsheets with assigned Specialists individually listed for each of the 1500-2000 calls typically assigned.

Current Process

Thursday prior to the scheduling week:

Task	Duration
Create and update call schedule template for next week. Check scheduled PTO for Call Team. Verify any office closures or required offline actitivites.	0.5 hour
Verify next week's commitments on Marketing Activities Calendar and enter them on call schedule template based on priority.	0.5 hour
If webinar follow ups are scheduled, determine which campaigns and export data from SalesForce as Excel files. Separate producers and leads into different spreadsheets (for both attended and no shows).	0.5 hour
Reminders: Estimate to call 70% of the records in the campaign due to cancellations and declines.	0.25 hour
Total **Supervisor** commitment for Thursday	2.75 hours

Friday prior to the scheduling week

Task	Duration
Create "Weekly Folder" to house non-New Producer Nurture spreadsheets Invitations: Export up to 2 spreadsheets per workshop venue Reminders: Note required completion date (along with note to export spreadsheets one day prior to workshop). New Producer Nurtures: Access the "New Producer Nurture" report in Salesforce. Set the dates to find registrations from 45 days ago. Assign them to the New Producer Nurture – 45 day campaign. Repeat for the 90-day campaign. Estimate the amount for Initial nurtures (the current week). Enter these numbers into the call schedule. These will need to be changed Monday to reflect accurate registration numbers. For the 45- and 90-day campaigns, access the previous milestone (i.e. find the Initial nurture spreadsheet for the 45-day. For the 90-day, locate the	1.0 hour

45-day nurture) Create a VLOOKUP formula on each spreadsheet, connecting it to the previous milestone's spreadsheet to get call owner information.	
Verify next week's commitments on Marketing Activities Calendar and enter them on call schedule template based on priority. Determine if any calls scheduled for the current week will "roll" to the week we're currently scheduling	0.25 hour
If webinar follow ups are scheduled, determine which campaigns and export data from SalesForce as Excel files. Separate producers and leads into different spreadsheets (for both attended and no shows)	0.25 hour
Create "Number Tracker" which assists with registrations vs. goal, prioritzation of workshops and tracking spreadsheet counts	0.25 hour
Remove duplicates, creating a separate spreadsheet for each level of deduplication.* Example: 1 spreadsheet for a 1st round workshop invitation turn into 3 spreadsheets (Original, Hard "dedupe", "Soft" dedupe). Repeat for each workshop venue.	0.75-1.0 hour
Meet with Manager for strategy discussion	0.5 – 1.0 hour
Determine which duplication effort best fits capacity for the week Ensure calls are distributed evenly, based on volume and call group** Example scheduling factors: - Assigning reminders to everyone so they are completed earlier (as they can only be completed the day before, assigning 1 person 70 reminders wouldn't be efficent or beneficial) - Determining how many calls per day can be made based on the blended amount of calls assigned (call group 1 and 2) - If overscheduled, ensure overscheduling is relatively equal	2.0 hours
Verify call schedule and call goal accuracy with Manager, making adjustments as needed.	0.5 – 1.0 hour+
Assign calls from call schedule using exported Salesforce spreadsheets	1.0 hour

Total **Supervisor** commitment for Friday	6 – 8 hours
Total **Manager** commitment for Friday	2+ hours

* There are two duplicate removal techniques: “Hard”, which removes repeated agent information, such as removing duplicate records that match agent name and e-mail address or agent name and phone number. The second technique, called “Soft” ensures we are only calling each agency once. This is sometimes used when there are capacity issues or reaching a large or double MSA. “Hard” deduplication is the standard for call assignment.

** This is done by pasting campaign numbers into cells for each Specialist, then using an Excel-built calculator to determine if the assigned amount of work only slightly exceeds the Specialists scheduled hours. This is to give the Specialist the ability to exceed their call goal for the week. In a week where there is more volume than capacity, overscheduling becomes a necessity. This makes the call goal even more important. A daily call goal along with a weekly call goal ensures Specialists do not think they are expected to complete an impossible amount of work.

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Monday of call week:

Task	Duration
Run New Producer – Nurture report for Sunday – Saturday of the previous week. Assign newly registered producers to New Producer – Initial Campaign Modify estimated numbers from Friday to actual numbers	0.25 hour
Verify if any changes impacted call goals, recalculating as necessary	0.50 – 1 hour
Create skills in InContact for each new call campaign, assigning the correct users and automated voicemail laydown messaging	0.25 hour
Total **Supervisor** commitment for Monday	1.5 hours

During the scheduled call week

Task	Duration
Make adjustments for unexpected PTO, system issues and other impacts as they arise	0.5 – 1.0 hour each
Verification of adjusted call goals / call assignments with Manager	0.5+ hour
Total **Supervisor** commitment throughout week	Varies
Total **Manager** commitment throughout week	Varies

Total hours commited per week:

Day	Supervisor	Manager	Combined
Thursday	2.75 hours	0	2.75 hours
Friday	6-8 hours	2+ hours	8-10+ hours
Monday-Wednesday	1.5+ hours	0.5+ hour	1.5+ hours
Total	**10-12+ hours**	**2.5+ hours**	**12-14 hours**