WFM Real-Time Performance Analysis Project

This document presents a Workforce Management (WFM) Real-Time Analysis project conducted using Excel. It simulates the daily responsibilities of a WFM analyst by answering key business questions using a dataset containing agent schedules, intervals, adherence performance, and call volumes.

## 1. How many calls were planned vs. actually handled today?

I used Excel formulas:  
=SUMIF(A:A, TODAY(), E:E) for Planned Calls Today  
=SUMIF(A:A, TODAY(), F:F) for Actual Calls Today.  
This revealed that 1,335 calls were planned and 1,118 were actually handled.

## 2. What is the overall adherence performance by agent?

I built a Pivot Table showing each agent's status counts (On Time, Late, Offline, Break Overrun). I added a column to calculate Adherence % as:  
=On Time / Total Intervals  
This allowed me to identify top and low performers.

## 3. Which shift is handling the most actual calls?

Created a Pivot Table with Shift as Rows and Actual Calls as Values. This showed which shift handled the highest volume of calls.

## 4. Which hour had the highest number of calls handled?

Built a Pivot Table with Interval (hour) and Actual Calls (Sum). Sorted values to determine the peak hour.

## 5. Which agent handled the most calls today?

Created a Pivot Table with Agent Name and Actual Calls. Sorted descending to find the top-performing agent by call volume.

## 6. Which agent had the lowest adherence rate?

Sorted the previously calculated Adherence % to find the lowest performer. This identified agents who may need support or coaching.

## 7. What is the average number of calls handled per shift?

Modified the Pivot Table from Q3 by changing the aggregation to AVERAGE instead of SUM. This gave the average actual calls per agent in each shift.

## 8. Which agent had the highest productivity (calls per hour)?

Used a Pivot Table to count intervals per agent and calculate:  
Calls per hour = Total Actual Calls / Total Intervals  
This measured productivity beyond just volume.

## 9. Which interval had the lowest call volume today?

Used a Pivot Table by Interval and Actual Calls. Sorted ascending to find the lowest-traffic hour, useful for scheduling breaks.

## 10. Did we meet our service level target today?

Calculated Team Adherence Average as ~55%. Since this is below the SLA threshold of 85%, the SLA was not met today.   
Formula used:  
=IF(Avg\_Adherence >= 0.85, 'SLA Met', 'SLA Missed')

## Daily KPI Summary – 31/07/2025

|  |  |
| --- | --- |
| Metric | Value |
| Today's Planned Calls | 1335 |
| Today's Actual Calls | 1118 |
| Call Gap | 217 |
| Adherence Rate - On Time | 55% |
| Adherence Rate - Offline | 16% |
| Adherence Rate - Late | 19% |
| Adherence Rate - Break Overrun | 11% |
| Average Team Adherence | 55% |
| SLA Target | 85% |
| SLA Met Today? | No |