

Policies and Advanced Directives: New Tools to Solve an Old Problem

Have you ever looked at your workforce management tool and said, “I wish it could do.....”, knowing that by the time you get the enhancement request to your vendor they probably won’t have that feature completed by close of business when your analysis is due? If you are an outsourcer, you don’t have time to wait for an enhancement request for the majority of what you do because you need it now, not later. What you need is a solution to handle unique scenarios and situations with creative means to formulate strategies.

The answer is found in a workforce management feature called *Policies and Advanced Directives*. This is a dynamic solution for making minor or major adjustments to any part of the workforce process and is exclusive to Pipkins technology.

The *Advanced Directive* commands allow you to include custom scripts or policies when generating a forecast or schedule that ensures your company’s unique, customized needs are included.

Policies use *Advanced Directive* commands in addition to the forecast algorithm and schedule rules so your company’s forecast and scheduling requirements are included in the adjusted forecast and schedule. This enables you to define and configure *Policies* that can be easily included when generating forecasts, schedules, rosters and exception requests. You can also use *Policies* with staff information.

Although the options are infinite, below is a list of where they are especially applicable.

- Short or long-term forecasting
- Intraday forecasting
- Enhanced special event and holiday planning
- Scheduling
- Staffing requirements
- Multi-skilled with aggregate queue sensitivity
- Vacation planning
- Ability to prioritize exceptions
- Re-optimization policies
- Individual staff
- Preferences
- Schedule trades and swaps
- Short term exception initiatives

One of the many forecasting benefits of this feature is the ability to handle the unique “what if” scenarios that can occur hundreds of contact types. You often need to evaluate variable skill combinations or re-assign a hybrid agent to maximize client service levels and maintain your

profit status. When using *Directives* for forecasting, you can develop endless combinations in a simple “drop down and select” action without reconfiguring the software. The ease of finding solutions within a designated amount of time in order to satisfy a demanding client or revamp a training class that starts next week can be done without sacrificing other workload responsibilities or inconveniencing other users because of a temporary configuration change.

A typical scenario that often occurs may include a client meeting that results in a new goal for handle time that needs to be implemented immediately. Making a change “on the fly” to address changes, unique initiatives or developing a catalyst that will be implemented for a short period of time is easily handled with another drop down. The drop downs can also be adjusted and saved for use at a future time, which simplifies the entire process and aids in long-term planning.

Re-optimization, another common thread of managing resources to demands that change on an intraday or intra-week basis, benefits the decision maker in deciding which components to re-optimize. Exceptions or intraday events are prioritized and the protocol can be applied on the fly or as a layout for a client-specific behavior which can also be easily applied to scenarios or finals with a simple drop down.

Policies and Directives also address the complex exception prioritizations that can occur during peak seasons. The ability to balance time-off planning as well as meet client service levels give analysts a myriad of options and scenarios based on priority. Weekly exceptions and possible conflicts are addressed with ease based on ranking of importance over partial or full day. Simply selecting a department-organized policy that would take a non-work event, such as the vacation exception, over the planned work exception of the all day training session, can be accomplished without manual manipulation of a schedule, or having to clear, remove and re-run schedules.

The use of *Policies and Directives* can be an invaluable asset to a workforce management professional when addressing their “unique RFP scenarios” or “long term staff planning” that require schedules that will retain employees, satisfy clients and maintain profitability.

Thinking and working inside a box can be a tricky situation. You need the foresight and tools to get outside that box in order to manage all the curves that may be thrown your way in your daily process management. The flexibility of *Policies and Directives* is available to assist in managing unique situations, while working to retain clients and compete in one of the most competitive industries.