

ADAPTING SCHEDULE ADHERENCE MEASUREMENT TO IMPROVE PERFORMANCE

Product No. 10039

ResponseDesignCorporation 
CREATING THE UNCOMMON CALL CENTER



Adapting Schedule Adherence Measurement to Improve Performance

Abstract

If you are implementing schedule adherence metrics, reading this groundbreaking article is a must. Schedule adherence may be necessary to provide customers the experience they desire, but it must feel “humane” to the agents who have every minute of their workday scheduled.

Working under schedule adherence can seem like operating under the watchful eye of “big brother”—the fictional, dreaded, intrusive, vigilant entity that sees whatever you do and is ready to “report” you to the powers-that-be the minute you slip up.

Kathryn Jackson recommends that you use schedule adherence as part of a comprehensive measurement system—a big picture. Agents learn how sticking to a schedule is something they must do for the overall satisfaction of the customer and the ultimate success of the company.



Adapting Schedule Adherence Measurement to Improve Performance

Kathryn E. Jackson Ph.D.

I was facilitating a discussion on contact center metrics the other day when the group started talking about schedule adherence. This management team was relatively new and they were noticeably concerned about the “big brother” feel to the schedule adherence metric. We spent a lot of time that day discussing why we need to implement such a detailed time tracking system and if we do need to do it, how do we do it in a humane way?

What is Schedule Adherence and Why is it Important?

Schedule adherence is the measure that tells us if agents are doing what they have been scheduled to do. Schedule adherence is important because every contact center’s goal is to have the right number of people on the phone each half hour of the day, so we can satisfy our customers’ desire for timely service. If we have done a good job forecasting call volume by the half-hour, and if we know the service level at which our customers are satisfied, then we can schedule the optimum number of people to be on the phone to satisfy our customers. This means that each agent must be on the phone when scheduled to be on the phone, or we will not be able to meet our customers’ desires.

Many contact centers try to hold agents accountable for service level metrics (e.g., % calls in X seconds). However that goes against one of the “rules” for an effective measurement system. Those rules are:

- The measure should be directly related to the department and corporate goals.
- The measure should be linked to the job description. For example, you can’t measure sales if sales is not part of the job description.
- The measure must be able to be accurately measured by multiple people over multiple reporting periods.
- The measure must be within the control of the individual being measured.

The measure must be “easy” to measure and manage (e.g. the time it takes to produce the measure must be commensurate with the value of the measure).

- The measure must be able to be produced in a consistent and timely fashion.

Response Design believes that you can’t measure an agent against the service level metric because of rule number four above. There are multiple teams contributing to the service level metric. We believe that service level metrics are truly team metrics.

Attaining service level is a combined effort of:

- the force management team (the team that forecasts call volume, schedules staff, determines when “emergencies” occur, and documents contingency plans)
- the local management team (the team that schedules impromptu meetings, identifies emergencies and assists with the implementation of the contingency plans)
- the agents (the people who adhere to their schedule and respond appropriately to emergencies)

The schedule adherence metric measures the agent’s contribution to achieving service level. As we all know, contact center schedules are highly complex. If agents are not on the phone when they are scheduled to be on the phone we will have trouble meeting our service level.



How is Schedule Adherence Calculated?

The first requirement to measuring schedule adherence is to have the software installed at your contact center that measures it (i.e., Workforce Management Software or often abbreviated as WFMS).

I'll use the following to illustrate a very basic schedule adherence calculation:

Activity	Scheduled Time	Actual Time	Out of Adherence
Log on	8:00	8:05	5 minutes
Break	9:30	9:37	7 minutes
Open for calls	9:45	9:55	10 minutes
Lunch	11:30	11:30	0 minutes
Training session	12:30	12:22	8 minutes
Open for calls	1:30	1:30	0 minutes
Break	3:00	3:10	10 minutes
Open for calls	3:15	3:25	10 minutes
Log off	5:00	5:10	10 minutes
			60 minutes

In this scenario the agent was out of adherence seven times during their shift accounting for 60 minutes. This represents an 87.5% schedule adherence (480 minutes – 60 minutes / 480 minutes).

Two Schools of Thought

Schedule adherence can seem like “big brother” because it tracks every minute of an agent’s day. To make it humane you have to make certain policy and procedure decisions. Beware, these schedule adherence policy discussions often result in heated debates between the different members of your management team.

The biggest question contact center managers face when implementing schedule adherence is what kind of time adjustments they will make to an agent’s schedule. Workforce management software allows the management team to manually adjust an agent’s schedules, so the agent’s final schedule adherence report does not indicate they were out of adherence.

There are two schools of thought about adjustments.

1. School of thought number one:

The management team decides not to adjust anything under a certain time frame (e.g., The team will not adjust any out of adherence occurrence unless it is over 15 minutes in duration.) If this were the case in the example above there would have been no adjustments since all “out of adherence” occurrences were under 15 minutes.

In this scenario, the management team creates a “buffer” in their schedule adherence standard to account for the inevitable occurrences under that time frame. So, instead of setting a standard of 99% schedule adherence they might set the standard at 95% to accommodate for these occurrences.

The management team then says that they will adjust the occurrences over the designated time frame only if the occurrence was outside the control of the agents. This means that if the agent signed off for lunch 30 minutes late because they chose to stay on a call with a customer to completely resolve their request, the



management team would adjust their schedule. For each occurrence greater than the designated time frame, the agent has to tell the management team why the occurrence was outside their control (i.e., they didn't just forget to go on break).

2. School of thought number two:

The management team decides to adjust all "out of adherence" occurrences as long as the occurrence is a result of the agent deciding to serve the customer. In this case, there is also a buffer set in the schedule adherence standard. This buffer allows for necessary non-phone related activities like getting a quick drink of water, or taking a quick unscheduled restroom break.

Most contact centers agree that occurrences that happen due to agent error are not adjusted.

What Makes Schedule Adherence Humane?

My next statement is not going to endear me to many contact center managers. If you are going to hold agents accountable for schedule adherence (which I think you should), if you have an emphasis on customer service and you want a humane system then you have to do school of thought number two. Let me explain why.

School of thought number one can motivate behavior that is contrary to customer service and often puts agents in a double bind. Let's say you are measuring service adherence on a monthly basis and this monthly metric is recorded on the agent's performance appraisal, thus contributing to bonus or merit pay calculation.

Now, consider this scenario. It's getting toward the end of the month and the agent has almost used their entire schedule adherence time buffer (and believe me, agents will always know where they stand in relationship to this buffer.). It's getting close to their scheduled lunch break and they are in between calls. They start to think – "If I sign off early or go into unauthorized idle I will definitely go out of adherence." So, they decide to take a risk, stay in available and possibly get another call. When the call comes in they think, "I can either speed up this call (so I can get to lunch on time) or else I can stretch out this call so it goes longer than the designated adjustment period. Or, I could forget making schedule adherence all together and simply service the customer."

What decision would you make? We've asked that question of many agents and their answer depends on their candor. However, their answer is really irrelevant (as is the question). The real question we should be asking is, "Why are we setting up a system that is causing agents to choose between personal reward and customer service?"

The Nightmare of Being Humane

The reason some of you want to stop reading this article right now is because you are thinking of the nightmare I have just created. You're probably saying, "I know Kay says she has managed contact centers, but now I have serious doubts about her sense of reality. Doesn't she know how many adjustments we currently make even with a 15-minute or greater time limit? Doesn't she understand that we don't have enough people to adjust all "out of control" schedule deviations? Has she gone mad?"

The answers to these questions are:

- Yes, I have a pretty good idea of how many adjustments you are currently doing.
- Yes, I know you probably don't have enough people.
- And, no I've not gone mad.



The fatal flaw we contact center managers often make is that we allow our inefficient process to dictate our “what’s best for the business” decision.

Yes, there will be some pain, but adjusting all out-of-control occurrences is not impossible nor does it need to be costly. There are manual and automated systems you can design to help make the adjustment process more palatable. Some companies have printouts of the agent’s schedules given to team leaders each day. The team leader simply circles the “out of control” occurrences and at the end of the shift a clerk collects the sheets. Clerks input the changes to the workforce management software. Other companies have figured out how to automate the reporting using some type of spreadsheet so they can download the changes into the software. Other companies have workforce management software terminals strategically located throughout the operation so team leaders can make adjustments directly into the software periodically throughout the day.

Even after all these “costs” you come out way ahead. By making it easier for agents to service customers and by not penalizing agents with your schedule adherence metric you increase customer and employee retention.

How Does This Impact Real-Time Management?

One of our customers asked how this “delayed” recording of schedule adherence occurrences allows the force management team to ever get a good look at the real-time needs of the operation. The best answer I can give you is that the real-time numbers available in the contact center today will not be significantly hampered by this slight variation. If you were to go to any force management team member at any point in any day and ask them why the service level is what it is, they would not be able to answer you with any certainty. There are so many complex contributors as to why the service level is what it is, that it takes a good long look at all the factors to truly determine the cause(s). Schedule adherence is only one of these complex contributors. Service level analysis is never truly accurate real time. It takes a historical look once all the facts are discovered. This fact of real time contact center management is not a comfortable axiom.

Schedule Adherence Standards

Once you’ve made the decision to adjust all deviations not within the control of the agent – then you’ve got to decide:

- Should your agents be able to meet 100% schedule adherence?
- What is your level of tolerance for schedule adherence?

The answer to the first question is no. Now, you’re probably asking, “If I am adjusting all ‘out of control’ occurrences why can’t they meet 100%?” The answer lies in the fact that agents may need to be off the phone when they are not scheduled to be off (e.g., to get a quick drink of water or to fax something).

If that is true, then some kind of buffer is needed. The best way to determine the size of the buffer is to translate 1% out of adherence into a number of minutes per week. For example, if a person works 40 hours in a week this equals 2400 minutes. For every 1% tolerance I am designating 24 minutes per week as a buffer.

To set a reasonable buffer, your team should brainstorm all the activities that might take a person off the phone during the time they are scheduled to be on the phone. Ask agents for their input. Discuss how often these happen and approximately how much time per week should be allocated to be humane.



Remember, be reasonable. I've had many management teams tell me that they think 30 minutes per week is quite adequate. My response is, "Does that feel fair?" How would it feel to you if I said, "I want you to account for all but 30 minutes of your time each week.?" Do you think you could do that? Probably not. But even more important, ask your agents how that request would feel to them. Unreasonable? Probably.

There's no one right number here. I've heard the statistic that contact centers generally allow a 5 – 7% buffer for schedule adherence. I can't verify that number because I don't know how it was determined. Does the 5 – 7% exist in a contact center where all "out of control" occurrences are adjusted? The best standards are those that are determined through team consensus and modified periodically by historical data. As with all other areas of the contact center, schedule adherence is not static. Schedule adherence standards must be dynamic.

How Do We Keep Sight of the Big Picture?

Schedule adherence can be presented as either "big brother" or "big picture". To keep it focused on the big picture we must continually relate it to customer satisfaction. Schedule adherence is a critical contributor to service level. It's easy to forget why we are tracking time so closely. It's for our customers and their satisfaction with the timelines in reaching us.

The recommendations we make to our customers when designing schedule adherence metrics are these:

- Determine your service level goal(s). For example, we want to answer 85% of our calls in 15 seconds. And, we want to achieve that standard 85% of the half-hours we are open.
- Next, define the events that are outside the control of each group contributing to service level (force management team, local management team, and agents). These events are those that could severely limit your ability to achieve your service level goal no matter how hard you tried. For example, a hurricane in Florida increases the calls to an insurance company and it will be more difficult to achieve and sustain service level during this crisis. Or, my favorite, the marketing department forgets to tell you about a new ad or mail drop that occurred yesterday.
- Develop individual metrics and standards for each group contributing to service level attainment. This means that the force management group, the local management group and the agents have to have their contribution defined. We have defined the agents' metric in this article as schedule adherence.
- Tell your groups that if you make your service level goal in a month (85% of the calls in 15 seconds and 85% of the half hours) then you will not look at the individual contributor metrics – everyone will be rewarded for making service level. However, if you don't make service level then individual performance will become a factor. Those who made their individual standard of performance will be rewarded. Those who didn't – won't.
- Help your people understand the big picture of service level and what they can do to assist the team in meeting customers' needs. Give them practical ideas on how to meet the requirements of their job. Give them group and individual coaching. Agents should be taught how to make good business decisions when it comes to time utilization. Communicate about the metrics and standards constantly. People should always know what is expected of them, why it is expected, how they are doing in relationship to the expectation, and always have the opportunity to grow into achieving the expectation.
- If this is the first time you are using schedule adherence as a metric we recommend you establish a "grace period" where you are measuring schedule adherence, but not counting it toward a person's performance appraisal. Use this grace period to let people see how their decisions impact their performance. Our

- 7 -

Product No. 10039

Response Design Corporation | www.ResponseDesign.com | 609.601.5866

Copyright © 1997-2009 by Response Design Corporation. All rights reserved.



recommendation is to use one full reporting period (usually a month in most contact centers) for this grace period. You can also establish this same type of grace period for new hires just out of training. It seems so much more humane to agents to be able to experience this for a while, so they can adjust their actions before it truly counts for (or against) their performance evaluation.

- Team leaders should always watch individual metrics and assist people struggling with meeting their objectives. But don't get into the trap of micro-managing your people. Don't look at daily reports. However, you can make the numbers available to your agents on a daily basis, so they can see how they are doing. Look at the metrics of agents who are struggling perhaps on a weekly basis, so you can make course corrections throughout the reporting period.
- There should never be the opportunity for one agent to say, "Sure we made the objective. But I worked twice as hard as Bobby did. He slacked off, yet he still gets the reward. That's not fair." It's okay to put policies in place that say, if a person's individual performance is under par so many reporting periods in a row, then even if the team makes the service level goal, that individual will not receive any reward. The system has to be fair and equitable over the long term. People have to believe in and contribute to the team effort. Let a cross-functional team determine the best way to make the system fair.

So, is your schedule adherence metric "big brother" or "big picture"? Go ask your agents. I'll bet they have an opinion.

Kathryn Jackson, co-founder of Response Design Corporation (RDC) and call center expert helps professionals get more from their call center. Response Design is the how-to source for integrating the call center into the customer relationship. Its independent consultants use call center web seminars, contact center consulting, call center tutorials, call center benchmarking, world class customer service articles, and best-in-class customer service practices to ensure you get the most from your call center investment.

Claim your free report [Creating Strong Customer Relationships through E-mail](#) by clicking on the title or e-mailing FreeReport@ResponseDesign.com. For additional uncommon call center ideas don't miss Kathryn's blog at www.responsesdesign.com/corner.html.

Reprint permission

If you wish to reprint this article for non-commercial use, article must be complete and include all contact information. Commercial use of this article requires copyright reprint permission. Apply to Reprint@RresponseDesign.com.