

# Workforce Optimization & Workforce Engagement Management

## Description

Building on foundational interaction-oriented technologies (omni-channel and NLP), workforce optimization (WFO) platforms improve the forecasting, scheduling, assigning, work simulation, tracking performance outcomes of an onsite and remote workforce engaged in omni-channel contact center activities. These solutions also include innovative training and development tools, quality management, performance management solutions and customer feedback capabilities. WFO solutions are beginning to leverage innovative technologies such as artificial intelligence to deliver efficiencies and uncover hidden areas of value.

As such, the WFO segment is continuing to expand and is now sometimes referred to as Workforce Engagement Management (WEM) and begins to shift its focus from performance metrics and efficiencies toward also ensuring teams of engaged and skilled resources. These employee characteristics then deliver improved customer experiences.

Given the ever-expanding breadth of this segment, some firms are specializing in more specific capabilities within this suite. For instance, the traditional Voice of the Customer (VOC) niche, has evolved into robust Customer Feedback Management platforms from vendor specialists such as MaritzCX, Medallia and Qualtrics. Just as the channels through which customers are able to and prefer to engage have expanded, the mechanisms now begin utilized to solicit and capture customer feedback are also changing rapidly. Similarly, Performance Management solutions are evolving to add employee engaging Gamification capabilities. Other areas that some might argue now fit into the WEM category might include Process Mining and Robotic Process Automation which identify value-low, repeatable tasks that can be automated allowing employees to focus on more fulfilling activities.

All of this to say, focusing on and providing tools to improve employee engagement benefit the company directly and are more likely to also improve Customer Experiences.

## Major Vendors:

Aspect  
Calabrio  
Genesys  
NICE  
Verint

## Case Studies:

[Transforming to an Omni-Channel Customer Experience](#)

[M&A Crisis Management and Employee Experience Redesign](#)

## Application

One of the most critical solutions within the broader WFO space is Workforce Management (WFM). WFM refers to the systems that forecast anticipated volumes by channel and type and subsequently staffing levels required to handle that volume based on service level goals (e.g. Average Speed of Answer).

Another critical sub-set of this category is made up of recording capabilities of audio, text and screen interactions further complicated by adherence to compliance requirements such as PCI that are designed to protect sensitive data by limiting its capture, transport and storage.

Frequently building on these recordings are Quality Management (QM) solutions that score associate interactions based on a variety of factors including customer service skills and technical accuracy. These solutions have been automated over time using speech recognition technologies.

As mentioned above, there are a variety of tools and techniques in the WFO segment related to Voice of the Customer (VOC). These survey tools vary by method of delivery, triggering events and methods of capture. Many sophisticated VOC solutions are finding that video-based capture methods are uncovering far more useful input than traditional, rating surveys.

In terms of closing the loop based upon feedback from QM and VOC results, some WFO solutions, either natively or through integrations, provide training (content) management capabilities. These solutions identify areas where specific training is required and integrate with the WFM modules to automatically schedule micro training sessions pulled from existing content. Alternatively, some platforms have advanced Coaching capabilities whose Performance Management identifies areas of opportunity and schedules Coaching sessions that include extensive management mechanisms that track areas being coached and measure before and after impact.

This is a technology segment that is constantly evolving in terms of features and capabilities.

## How to Get Started

Many organizations take a phased, prioritized approach to building out these solutions. As you can imagine, driving operational efficiencies, adherence to compliance regulations and getting feedback in terms of QM and VOC are all high priorities. Many companies can satisfy some of these key areas through rudimentary, home grown systems as they grow and evolve. For instance, many companies still rely on Excel-based tools leveraging relatively simple algorithms. However, as companies reach critical mass (30-50 FTEs) the value of more sophisticated enterprise solutions grows.

## Our Services

Business Agility

Advanced Analytics

Technology Architecture

Digital Transformation

Artificial Intelligence

Interim CIO, CDO & CTO

Customer Experience

IT Performance Improvement

Critical Initiative Leadership

## About Cimphoni

Cimphoni is built on the premise that technology, when properly applied and led, can deliver innovative solutions that transform businesses. The Cimphoni team is comprised of technology, operations and business consultants with a thirst for innovation and a passion for leveraging emerging technologies to deliver exceptional, measurable results for our clients. Founded in 2012, Cimphoni serves customers throughout the United States from its headquarters in suburban Milwaukee. More information can be found at [cimphoni.com](http://cimphoni.com)