



Call Center Staffing in a Union Environment

By Maggie Klenke

In many call centers today, the process of developing a set of schedules and attaching employee names to those schedules is a major challenge. For those centers that have a workforce represented by a union or workers council, it can be even more challenging. We have had the opportunity to work with some call centers in navigating through this maze, and we would like to offer some ideas that can create a win-win environment in these negotiations.

First, we must clearly understand the needs and desires of both parties in this process. The call center management is driven to serve the callers in the most efficient and effective way possible that maximizes the company's bottom line. In general, the workers (referred to as agents in this article) and their representatives want to have work schedules that afford them a real life outside of work, a sense of continuity and control in their lives, and fairness in treatment compared to other agents. This sense of fairness issue can span multiple sites in those call centers where calls are shared among multiple centers.

There are two major activities that result in the creation and assignment of shifts. The first is the analysis of the caller demand and call arrival patterns that result in a forecast for which a set of schedules will be developed. The second is the process by which agents and schedules are matched to one another.

Creating the Schedules

In the largest majority of call centers, the historical pattern of caller demand is a good predictor of the future. If Monday has been the peak day of the week for months, there is every reason to believe that it will be the peak day next week. Seasonal patterns tend to repeat themselves year to year, and even the daily call arrival pattern is fairly consistent in most centers. Sure, there are exceptions driven in many cases by specific events. That is why it is so important that a knowledgeable human being is involved in the forecasting process.

When these patterns are known, and growth expectations are added in, the call center can begin the process of developing the schedule. First is the forecast of workload by half-hour for the upcoming period (Workload is defined as the number of calls multiplied times the average handling time.) Then a forecast of the number of bodies in chairs is needed for each half-hour to meet the defined service level. This is the base upon which the schedules will be overlayed to determine whether the center is over staffed, under staffed, or right on for each period. And, of course, the patterns shift month to month if not week to week, making it essential to have the flexibility to change the shifts to match the patterns.



Now comes the first major challenge in the matching of people and shifts - the creation of the shifts themselves. The scheduler must only use those schedules that are acceptable and approved. If there are lots of shift choices with full-time and part-time personnel and minimal restrictions, the scheduled number of people and the number required to make service level will be fairly close in most half-hours. As the number of shift options reduces and the restrictions increase, the match is more difficult, resulting in more periods of over and under staffing.

For some call centers with many restrictions on the shift options, the scheduling process creates a largely unworkable plan. This results in massive efforts to adjust in real time, expenses that are too high for over staffing, or poor service levels from under staffing. Some experience all of these over a period of time. Focus on adjustments in real-time create problems for both management and agents and distrust of the scheduling process in general. So creation of a workable plan is clearly in everyone's best interests.

Schedule Assignment

Once the shift choices have been developed, there are a couple of relatively common methods used to assign agents to that set of schedules. Shift bids based on seniority rules are common in North America, with a few centers using a shift rotation plan (where everyone works all the shift types over a period of time). However, in Europe it is more common to see rotations and even individualized contracts. A more recent trend seen in some call centers is to have shift bids based at least in part on performance criteria rather than just seniority, although these are less common in union environments. All of these plans are aimed at meeting the agent's needs within a context that is manageable for the center.

Seniority and/or performance criteria bid processes require that the center create a complete list of the shift choices and let the agents choose the one they want in the appropriate order. Each agent making a choice must know what is still left to choose from, and even what other specific agents have chosen (for car-pooling, etc.). In some complex environments, this can be a process that takes place over a period of days or weeks, making it so expensive that it can only be done once or twice a year. This limitation makes it difficult to adjust to the constantly changing calling patterns from month to month.

Rotational shift patterns move agents through all the choices over a period of time, often as many as 10 to 15 weeks. This gives each person some day shifts and some nights, weekdays off and weekend off, and a constantly changing world. It is largely viewed as fair because everyone has the opportunity to work the best shifts, but everyone must work some of the least desirable shifts as well. Constantly changing work patterns result in problems with sleep patterns, childcare, and generally achieving a stable life situation for the agents. But at least it is considered fair.

The biggest problem for the center with rotational shifts is the fact that a set number of people move through the shift choices each week. That requires that each rotation have



the same number of people in each option, and that is difficult to accomplish without over and under staffing. When agents quit, are hired, or change roles, it upsets the rotation. In one case, all of the new hire training class agents were assigned to the day shift with weekends off as soon as they moved to taking live calls so that the day-shift training staff would be able to assist them. That meant that a big group of personnel were arriving into that shift set, displacing others who would have had that shift, or over staffing that shift. Neither choice is attractive.

Add the complexities of multiple sites or skill-based routing to the mix and you have a situation that approaches the unmanageable.

Some Possible Aids

During the negotiation of worker contracts, the issues of shift choices and schedule assignment plans are often on the table. The agents have ideas about things that would improve their lives and the center has ideas to make it more efficient and manageable. The problem is often that the negotiators do not have any real idea how their desired changes will impact the final result.

We have worked with organizations during this negotiation process to help them see the impact of the choices they are making. Our experience is that all the people we have worked with on both sides of the negotiation are reasonable people who will respond to solid evidence of the impact of options. In one case, the center had determined that in order to meet the newly mandated service level, they would need to add 1/3 additional staff under the current scheduling rules. We simulated that set of schedules and call demand patterns and validated that this was the case. But we also took out the schedule restrictions and added some new shift choices to the simulation and found that with full flexibility the center would not need to add a single person to meet their new service level. These two ends of the possibilities served as the basis for the negotiations.

With the two scheduling options simulated, we sat down with both the agent representatives and management and showed them both of the initial possibilities. We suggested that while the maximum flexibility we had simulated might not be acceptable, surely we could get closer to it than the current limitations. It was a whole new way of beginning the negotiation process. Over the next few days, we guided the process through many variations of choices. Each option suggested by the agent reps was input into the simulator to see how it changed the results. Some were clearly helpful and others were not, and everyone in the room could see the results within a few minutes of the suggestion. So some ideas were kept in the simulation and others discarded with everyone's concurrence. New ideas were added and tested, finding choices that appealed to agents and worked for the center as well. When it was all done, the new schedule options and shift definitions were approved by the union, accepted by management, and required the addition of only a few new personnel to meet the service level rather than the incremental 1/3 originally forecast.



In another case, the schedule assignment process was automated with the input of each agent's preferences, seniority ranking, and performance ranking criteria. When the shifts were determined to meet the call center's needs, the automatic assignment process reviewed each agent's preferences in the predetermined order. When the system had a flag to stop for a manual review (such as a car-pooling issue), the scheduler would invite that agent to make a manual choice from the remaining options, and then re-enable the automated process for the remaining agents. This reduced the assignment and choosing time to a small fraction of the previous process. It is hoped that this automated process will also make it possible to change the shifts more often than the once per year this center had lived with in the past.

Summary

It is our contention that negotiation for call center operations benefits from the ability to simulate the impact of the options suggested by both sides in the process. All parties are typically reasonable when the analysis of the choices under consideration is credible and relatively immediate. Automation of schedule assignment processes can reduce the time and effort needed to accomplish this process, making it possible to adjust the shifts more often than manual processes will support. The results can improve the lives of agents, the efficiency of the center, and ultimately the experience of the organization's callers. And, after all, isn't that what it is all about?

About the Author....

Maggie Klenke is a Founding Partner of **The Call Center School**, a Nashville, Tennessee based consulting and education company. The company provides a wide range of educational offerings for call center professionals, including traditional classroom courses, web-based seminars, and self-paced e-learning programs. For more information, see www.thecallcenterschool.com or call 615-812-8400