

Dialogue

NOVEMBER 2007

Focus

The Elusive Right-Staffing Solution: Matching Staff to Demand

Staffing to match fluctuations in call volume was the most frequently voiced challenge for call center managers, according to an industry survey conducted by Call Center Consulting Network (3CN) in early 2007. But, since 70%-80% of a call center's budget relates to staff wages, staffing efficiently is crucial to a call center's financial success. Balancing staff numbers, call volumes and service levels while minimizing cost is a tall order (see the "Perils" sidebar).

So, how to solve the juggling act? Through careful analysis and planning, the process of "just right" staffing can be a reality instead of mystical guesswork. An effective workforce management plan involves the following principles:

- 1) Analyze historical data
- 2) Forecast call workload
- 3) Calculate staff requirements
- 4) Create workable staff schedules
- 5) Manage daily performance real-time

Analyze Historical Data

Forecasting assumes that patterns of call volume will repeat and are predictable. When do the calls typically come in? Profile the call demand of your services by month of the year, day of the week, and time of day. While there will be some variability daily and weekly, this analysis will establish a baseline forecast. In order to arrive at the most accurate trending, scheduling experts advise us to look at a year's worth of data. Use ACD or call software reports to identify incoming call volume as broken down into hourly or half-hourly increments. Identify trends and also any unusual spikes or deviations from the norm. As an example, influenza struck unusually early in October 2003. The sudden volume of calls was typical for the start of flu season, but atypical in that it was roughly two months earlier than expected. Service line changes (added or dropped) and marketing



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Matching Staff to Demand

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campaigns may also abruptly impact call volumes. It may help you visualize trends by graphing or plotting your normal volumes by call type. Understanding your baseline volumes is the key to predicting future volume and staffing needs.

Historical analysis can be done manually with some elbow grease and a spreadsheet, but it's time-intensive. The good news? It is well-suited to automation. ACD and call processing software have reporting packages that can provide you with reports on call arrival (ACD) and calls handled by service type per time increment (call software). Use these tools to jump start your data collection activities (see Software Support for an example of call arrival reporting).

Forecast Call Workload

Once you've established the volume baseline, drill down from the monthly, weekly, daily and hourly (or 30-minute) increments to project demand. For the majority of time, you can assume you will have similar volumes to the prior week at that same time on the same day and adjust as necessary based on your historical monthly analysis.

Examples of adjustments and factors to be considered include:

- Holidays which fall on different days of the week from one year to the next.
- Months which have more Mondays (5 instead of 4). In Monday to Friday call centers, Mondays may see higher call volume in general.
- Multi-channel activity such as web, email, chat, and fax.

External factors may also impact accuracy in staffing forecasting. Examples include IT system changes or network updates that affect normal call processing, urgent

health topics in the news, and/or surprise marketing promotions. It pays to establish good channels of communication with departments and media that can influence your call volume.



“Most call centers do not staff to full coverage and 100% service levels due to cost constraints. This will result in being under or over staffed at some point in the day.”

Once the call volume by hour (or half-hour) has been forecast, average call handle time needs to be factored in. The average handle time (AHT) includes talk and wrap-up time for the total transaction. If there is significant variation in AHT among staff, this may impact the number of staff required. For instance, if a higher percentage of newer staff are working a particular shift, it may result in slightly longer AHTs on those shifts and require more staff.

Calculate Staff Requirements

After call volumes and handle times have been set, the next step is to consider your

desired service level. Service level is typically expressed as the percentage of calls answered in a defined time frame, such as “80% of calls are answered within 20 seconds.” Our industry uses several metrics to analyze service level, which in turn influences staffing requirements. The most common include:

- Average speed of answer (ASA)
- Delay, wait, and/or hold times
- Abandonment rate
- Blockage rate (busy signal as calls can't get through)

The Question of the Month data indicate most call centers use abandonment rate, calls per hour per agent and ASA to govern staffing levels. Other factors that influence your call center's service level targets are customer expectations, competition, budget and your organization's desired position within the marketplace. This “bigger picture” needs to be considered when setting service level goals as it drives staffing numbers and therefore the cost of operations.

Staffing numbers can be calculated using an Erlang formula. These formulas (there are several models) were originally developed for telephone traffic, but have been applied to ‘traffic’ in a variety of industries. Erlang C assumes that all calls will stay in the system until they can be handled. It is the formula most frequently applied to call center staffing and assumes if calls cannot be immediately answered, they enter a queue. Erlang calculators are available on websites such as www.erlang.com, www.kooltoolz.com and www.thecallcenterschool.com/tools/quikstaff_software.aspx.

Ellis Smith, the telecom consultant with 3CN comments, “Erlang C is the same theory, with various refinements, used by every major work force management software company.” Smith provides Erlang C workshops for call center managers, teaching how standard blocking theory applies to their own “real” data. Once the formula is applied

and refined to their specific call center operation, managers can properly staff by time of day and adjust for daily variables. The model needs updating only when changes in services or volume are noted.

There are additional challenges which go beyond predicting call arrivals. Variation in staff productivity and schedule adherence top the list. Schedule adherence is defined as the availability of agents to be at their desk performing calls. Obvious factors such as breaks, lunches, tardiness, and absenteeism will impact your ability to meet service level standards. Other events, such as training new employees, pull your senior staff off the phone and change the average handle time and productivity.

Non-call work must also be tracked and accounted for in schedule development. This includes time spent in continuing education or competency evaluations, training, chart review, performance evaluations, and meetings. Indirect time may also include retrieving emails or voice mail messages, following-up on any concerns or complaints received during the shift, and updating databases with correct information.

Create Work Schedules

Once you have established your staffing numbers, it is time to create the actual

schedule. This is both an art and a science. The science is to make your schedule as cost-effective as possible to adapt to the peaks and valleys of your hourly workload pattern. The art is being adaptable and creative in meeting workload demands while incorporating staff preferences. Scheduling software is just one component of workforce management solutions, but there are also stand-alone software products which facilitate online schedule management and offer features such as change and vacation requests and on-call availability. There is a broad price range for these packages, but some hosted solutions are very reasonable (less than \$1,000).

Most call centers do not staff to full coverage and 100% service levels due to cost constraints. This will result in being under or over staffed at some point in the day. Designing a flexible schedule model (options for on-call, remote, part-time, and project staff) may help address these gaps. Check our Tool of the Month to explore solutions to scheduling challenges.

Workforce Management (WFM) tools which integrate with a call center's telephony and/or ACD system automate the analysis-forecasting-calculating process. Added advantages they offer include incorporating non-call activities and factoring in agent skill set. Once

implemented, WFM supports monitoring the call center's performance in real-time and help managers visualize adjustments needed in queuing, schedule adherence and staffing numbers.

With all these features and benefits, it seems as though every call center should have WFM. But from our Question of the Month, less than 8% of respondents do. For our industry, the barriers to licensing WFM involve center size and cost. The typical cost to license and implement a WFM system ranges between \$75,000 to more than \$200,000. Small centers with less than 20 workstations cannot realize enough gain in efficiency to balance the expense. In other words, the return on investment (ROI) is not high enough in the short term.

Larger centers, however, can prove the value of WFM - financially, operationally and through increased employee satisfaction (see the WFM article on page 4). A number of companies now offer hosted WFM solutions that eliminate the upfront investment in infrastructure (and capital budget). They can also reduce the requirement of staff to manage the staffing/forecasting process.

Matching Staff to Demand
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Perils of Imbalance

A mismatch between staffing and workload impacts employee morale, customer satisfaction levels and your financial bottom line.

Understaffing leads to longer wait times which impact customer satisfaction and may ultimately influence caller loyalty. Understaffing also impacts staff morale. With an endless sea of queued calls, staff feel the pressure of call after call without a break. If this situation is perpetuated long term, staff become frustrated and call quality may suffer as a result. Individual motivation and morale is eventually negatively affected, resulting in burnout and turnover.

Overstaffing also has consequences. It drives up operational costs unnecessarily. Extended periods of time for staff without enough work can lead to staff boredom and possible turnover. And while overstaffing may result in no wait times for callers, it may set unreasonable customer expectations that become difficult to maintain in the long-term.

Optimizing Workforce Management

Some contact centers are putting aside their Excel spreadsheets and moving to a workforce management (WFM) solution. WFM products are designed to boost operational efficiency while minimizing cost. They automate forecasting and scheduling, which results in a better match between supply (required staff) and demand (call volume). Managing real-time call center operational performance gives supervisors more control over the dynamic nature of call center work. WFM products can also alert on-call staff regarding urgent schedule needs via phone, text messaging, and/or email.

WFM was once a separate software package requiring an interface to the contact center's ACD. In recent years, many acquisitions and mergers have occurred in the telecom industry. Now, it is common for the same vendor to offer integrated ACD, IVR and voice recording systems as an all-in-one solution. In addition, a number of programs are also offering hosted solutions that take the call center out of having to invest in the infrastructure or dedicate an in-house employee to manage it. Some of the WFM vendors available include:

- Avaya (bought Witness and Blue Pumpkin)
- Pipkins
- Portage Communications
- GMT
- IEX
- Aspect

Bob Schmid, Director of Operations for NurseWise, spoke to Dialogue regarding their call center's use of Witness (now Avaya) Blue Pumpkin. NurseWise is a call center that operates from four different locations employing 160 FTE's with a staff of approximately 200. The company started collecting and analyzing historical data for use with forecasting in January of 2007. It implemented Blue Pumpkin in July as an initial part of a phased implementation to be rolled out gradually. The online schedule feature for staff was introduced first. Currently, staff can view their schedules by logging in online and can submit vacation and time-off requests. The company is also considering utilizing the shift-bidding capability in a later phase.

Mr. Schmid attests to improved operational efficiency based on the automated forecasting ability. For example, when NurseWise loses an employee through attrition, they go back to the WFM analysis and look where staffing holes exist. Hours that demonstrate weakest coverage will dictate which hours the company hires into, not necessarily a former employee's previously covered hours.

Real-time supervision is managed by a "call center control group" since NurseWise operates largely remotely. The software has the capability of sending "alerts" to the specific location where a potential staffing mismatch to call volume exists. Likewise, when a staff member calls in sick for a scheduled shift, a communication is sent to the regional site for the supervisory team that the schedule may need to be adjusted.

Schedule adherence can also be monitored real-time so that NurseWise supervisors can tell when staff are logged into, or out of, their phones. The WFM software is also capable of interfacing with their payroll department to automate call center operations even further.

Catherine Davis, a Business Analyst with Clarian Health Partners, also provided her perspective on implementing Aspect's EWFM product. They have been using this WFM product since September 2007 for a department of about 30 staff. Ultimately, they plan to roll it out to four different departments. Ms. Davis described the scheduling process with this software:

1. Automated forecast is run
2. Staff schedule is run in comparison to forecast
3. Scheduled shifts are determined based on optimizing staffing to match predicted call volume and service levels being met
4. Staff bid online for open available shifts

The manager may need to "tweak" the final schedule based on certain staff needs, but overall, using this product has decreased time spent on scheduling significantly. It has also minimized overtime without impacting call center performance, resulting in cost-savings. Ms. Davis also mentioned that the ambiguity of staff schedules are resolved using this software, since lunch and breaks are pre-scheduled around meeting the customer's needs and service levels first. The daily schedule also adjusts for other pre-scheduled non-phone work, such as a coaching session with an employee.

WFM tools are continuing to evolve with advancing technology. And with hosted solutions, these features may now be price-acceptable for the smaller or mid-sized contact center. ●

Call Arrival Report by Service

Duration Date: 11/06/2007 – 11/07/2007

	Triage	Health Inf	Phys Ref	Svc Ref	Class Reg	Transfer	P2P Cons	Ans Svc	Other	TOTAL
HOUR										
12:00 am	20	1					1			22
1:00 am	13									13
2:00 am	8									8
3:00 am	7									7
4:00 am	5									5
5:00 am	6									6
6:00 am	10									10
7:00 am	3		3				20			26
8:00 am	8		9		3		25			45
9:00 am	3	1	8		2		28			42
10:00 am	4	2	3		5		31			45
11:00 am	4	1	8		3		30			46
12:00 pm	5		4				45			54
1:00 pm	2		10		1		12			25
2:00 pm	3		5				18			26
3:00 pm	4		12		1		27			44
4:00 pm	4		4				40			48
5:00 pm	40	3					30			73
6:00 pm	60	2	1				3			66
7:00 pm	77	2					2			81
8:00 pm	71	2					1			74
9:00 pm	52	1					2			55
10:00 pm	45	1								46
11:00 pm	23						2			25
TOTAL	477	16	67		15		317			892
AHT	8.3	5.2	5.5		4.0		3.2			

As mentioned in the lead article, there are a few sources for gathering historical call demand data. A Call Arrival Report, like this one, can be produced from your call center software. Our example shows calls by hour of day. It is just as easy to retrieve call counts for every 30 minute period, if you choose. The advantage of a report from your call center software is that the calls can be filtered by type of service. An ACD report typically provides call volumes per time period, but does not sort the calls into service demand. The exceptions to this are 1) if the caller is asked by auto-attendant to choose which type of service (press 1 for a physician referral, as example) or 2) if you have different inbound numbers for the different services lines you answer.

For LVM Customers Only

Training Tip

Using Time Ticket to Account For Non-Phone Work

The primary focus of call center employees is to answer and process incoming calls. However, employees are also responsible for “non-phone” work. Examples may include:

- Reading/responding to email, web, voice mail, faxed requests
- Required education and training
- Mentoring or coaching new employees
- Competency and performance reviews
- Call audits or QA activities
- Meetings
- Follow-up on complaints
- Researching caller requests
- Communicating with other personnel or departments
- Problem solving

The amount of time spent performing indirect work is often underestimated (or totally ignored) in the staff scheduling process. Managers may have a false assumption that this work gets done in between calls regardless of the call volume or baseline staff scheduled. Failing to include an accurate calculation of this indirect work time in scheduling can result in being understaffed and impact service level objectives. In ongoing understaffed situations, holding employees accountable for both phone and non-phone work can lead to staff frustration, burnout and turnover.

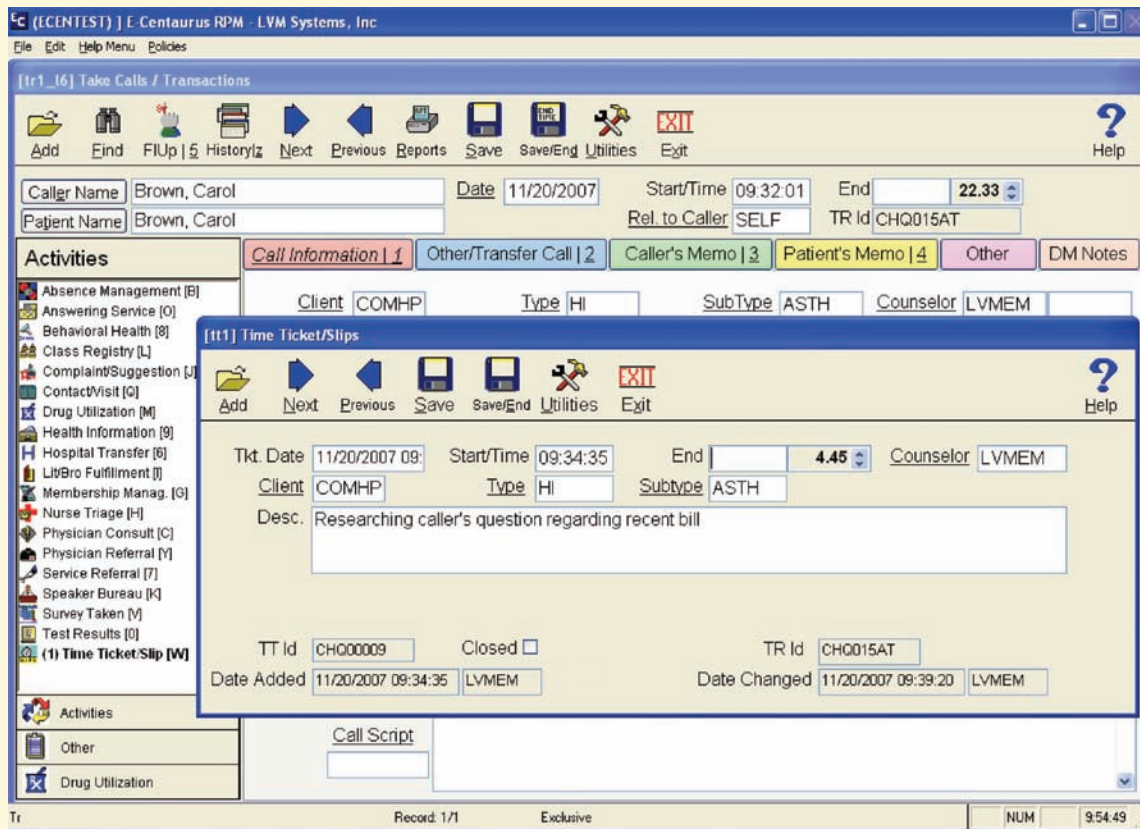
Having an accurate measurement of this time helps justify why agents may be off the phone. It also provides a realistic picture of operational costs by accounting for the time spent fulfilling job responsibilities. So, how can you objectively measure this component? Answer: by using your call center software to track your time off the phone.

Approximately 18 months ago, LVM developed the Time Ticket module to enhance the ability of its own employees to track projects and daily work, (See screen shot, page 7). They use the E-Centaurus software to track and manage project work in all departments of the company. Just as in call centers, each LVM employee is expected to stay on task and use time efficiently. Time Ticket offers a quick way to log project minutes (or hours) and also categorize the task by type and subtype. Other features include the ability to identify a client for whom the project was completed and capture a brief description of the work or any notable related items. The date and start time pre-fill automatically. The “ticket” is then left open until the task is complete. Selecting “Save/End” posts an end time and stops the project clock. A Time Ticket Summary report (illustrated below) can be run daily, or for a date range, to identify time spent on indirect work activities.

TIME TICKET SUMMARY REPORT

Date: 11/02/2007

Counselor Id	Time Ticket Activity Code	Total Time Spent (Min)
KDM	Continuing education	30.47
EM	Researching caller's request	15.20
TMS	Orienting/training (chart review)	42.55
	Total Time Spent	88.22



Time Ticket can also be used in association with another transaction. One example is tracking the time required to facilitate a physician appointment. Most call centers facilitate appointments through a three-way connection between the caller and physician's office. Sometimes this goes quickly, but with certain offices, the process is more time-consuming. At the point the representative connects to the office, she can open a Time Ticket and indicate APPT (or maybe "WAIT") as the subtype. You can set up the table with terms that make sense to your staff. Once the appointment is scheduled and confirmed, the Time Ticket can be closed, capturing the time spent facilitating the appointment. A report can be run for the APPT (or WAIT) subtype to identify the time consumed 'on hold' or in appointment negotiation with the various physician practices.

Consider the opportunity to account for the ways time is spent, or misspent, in day-to-day operations. Time Ticket offers an easy method to measure, and better manage, how each day is spent. ☛

Balancing Staff and Demand

According to our Question of the Month results, call centers fall into three categories when it comes to available staff versus call demand:

- Demand exceeds staffing majority of time (40%)
- Demand is variable throughout the day (35%) with both overstaffing/understaffing a problem
- Demand is balanced with staffing the majority of time (20%)

Depending on your call center's situation, the following lists of solutions may offer new light to your toughest staffing challenges.

Schedule Alternatives:

Explore flexible schedule options to meet variable or peak pattern demand

Solutions:

- Non-traditional shifts: split shifts, shorter or longer shifts, staggered shifts
- Remote shifts: explore telecommuting
- Established pool of reserve employees: part-time, as needed (prn), flex staff
- On-call staff: a list of employees willing to help, which days and which hours
- Cross-train staff with another department
- Temporary or contract positions to fill in shortages or staff up for anticipated call volume increases
- Former (successful) employees that may be willing to supplement in an emergency
- Supervisors or managers recruited to help temporarily as short-term supplementation

Schedule Adherence:

Improve schedule adherence to optimize productivity with the same number of staff

Solutions:

- Monitor adherence: are agents at their desks and ready to take calls?
- Coach staff on the impact of adherence to schedule
- Help staff understand how each individual impacts service levels and the call center's overall performance
- Evaluate and share call center reports on staff productivity (time on the phone) and efficiency
- Account for non-phone work (including all mandatory job activities) in the schedule
- Track absenteeism
- Reward good attendance
- Follow through on identified problems with disciplinary action
- Explore different ways to schedule lunches, breaks, and meetings
- Common practices may need to be rearranged to meet call demand

Staff Skill Sets or Staff Mix:

Imbalances with either staff mix (novice vs. seasoned employees) or improper skill sets can result in longer AHTs and inability to meet service levels with adequate staff numbers

Solutions:

- Evaluate and balance skill mix on a shift-by-shift basis (e.g., new staff with senior staff, skill sets required for different service lines)
- Is it feasible to cross-train staff for a large percentage of calls?
- Approve scheduling/shift trades in advance
- Hire for key skills that insure candidates have good job fit

Accurate Forecasting:

Accurate call volume predictions help take guesswork out of staffing to demand

Solutions:

- Evaluate call demand pattern per service
- Do you have the right budgeted FTE's for your call volume?
- Can you add staff or pilot new opportunities?
- Take into account multi-channel work (email, web, fax, fulfillment, etc.)
- Identify areas of staffing excess and shortage. Can you "flex" the workload (certain services) to create a better match?
- Make a business case for improved workforce management: define costs of poor service levels and the value of low abandonment to upper administration
- Explore telephony and software tools that automate volume tracking and forecasting
- Develop proactive communication with those departments whose projects may impact call volume so you can prepare and adjust staffing

System Operations Optimization:

Are there process improvements that your call center can explore (to system or staffing) that can improve efficiency? This directly impacts the bottom line and number of staff required to meet service levels.

Solutions:

- Explore the different call process modes: 70% of call centers operate in "live" answer, but the receptionist and call back models are more cost effective
- What are your non-staff options? Can online or IVR technologies help?
- Pre-record messages to help direct callers to service alternatives & resources within your organization; advise callers of wait times
- Encourage online self-service options: HouseCalls Online for self-care decision support, physician referral/appointment requests, class registration, literature requests, and health information libraries
- Are there portions of call process that can be handled with technology, such as TTR- touch tone response (for surveys or disease management), or non-clinical personnel (in the case of triage)?
- Are there non-essential parts of call process that can be skipped during busy times?
- Are all your staff processing calls efficiently and productively?
- Consider coaching in call management techniques

Workforce Management and Staff Scheduling

How it Works:

Monthly questions are sent to our database of call center managers, with the hope of receiving one response per call center. 3CN collects and aggregates the answers, keeping the individual responses anonymous, and then publishes the results. The “N” value associated with each question identifies the number of responses that were received.

What are the main services your call center provides? (N = 55)

(select no more than 2)

- 63.6% Nurse Triage
- 52.7% Marketing / Referrals
- 18.2% Answering Service
- 12.7% Central Scheduling
- 3.6% PBX
- 1.8% Disease Management

How many call center agents do you employ?

Component	Range	Mean	Mode	Median
Head count	2 to 200	26.1	17	17
Total FTE	1.5 to 160	19.3	5	14.5
Concurrent Workstations	2 to 40	9.6	5	7

How are the majority of calls processed? ((N = 55)

- 70.9% Direct— answered live by call center agents
- 18.2% Direct – front-ended by receptionist, queued for call back, transferred or put on hold
- 7.3% Call Back Mode – receive faxes/emails from answering service and call clients back
- 5.5% Call Back Mode – Callers leave messages and agents call clients back

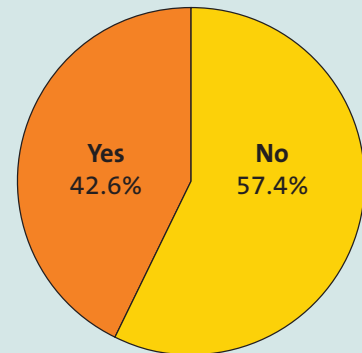
As a manager, what do you see as your biggest staffing challenge? (N = 55)

- 40.0% Understaffed frequently – Call demand exceeds available staff
- 1.8% Overstaffed frequently - Available staff exceeds call demand
- 34.5% Both are problems depending on time of day
- 20.0% Neither are problems - we are adequately staffed the majority of time

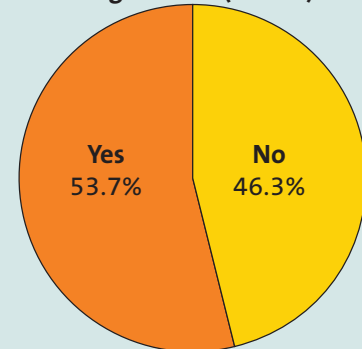
What scheduling method are you currently using: (N = 52)

- 32.7% Paper
- 42.3% Excel spreadsheet
- 9.6% Scheduling software
- 7.7% Workforce management software (more functions than just scheduling) Specifically: My Time; Blue Pumpkin; Agent Powers
- 9.6% Other: Outlook Calendar; Erlang Calculator; MS Word table; One staff; IDX; Kronos; Staff Runner; Quandris; EWFm

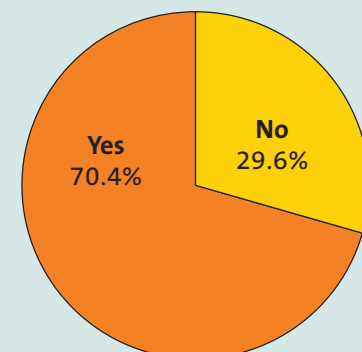
Do you allow staff to self-schedule or bid on open shifts? (N = 54)



Do you use call center software reports to help you forecast scheduling needs? (N = 54)



Do you use ACD reports to help you forecast scheduling needs? (N = 54)



Do you use any of the Erlang formulas to help forecast scheduling needs? (N = 54)

- 22.2% Yes
- 78.8% No

Which service level parameters do you use to determine staffing levels? (N = 54)

- 61.1% Abandonment rate
- 51.9% Calls / hour by agent
- 50.0% ASA (Average speed of answer)
- 37.0% Delay, response and/or 'on-hold' times
- 29.6% AHT (Average handle time)
- 5.6% Blockage rate (callers that receive a busy signal and don't get through)
- 18.5% Other: service level percentage; staff feedback; agent "ready" time; calls per day;

During a shift, how do you handle when call volume exceeds available staff, compromising service parameters: (check all that apply) (N = 54)

- 33.3% Recruit extra available staff from home (not scheduled or designated on-call)
- 31.5% Nothing. We manage with number of staff we have.
- 29.6% Recruit extra available in-house staff (e.g., supervisors, managers, etc)
- 27.8% Rearrange existing pre-scheduled staff: call scheduled staff in early, etc.
- 22.2% Divert calls to voicemail
- 13.0% Divert calls back to MDs (triage only)
- 7.4% We use prescheduled designated on-call staff
- 3.7% Divert calls to another department with cross-trained staff
- 5.6% Other: take messages for some or all services

Do you have staff that work remotely / telecommute? (N = 55)

- 29.1% Yes
- 70.9% No

How many? (N = 14)

Range in responses: 1 to 50 employees
Mode (most common answer): 10
Median (midpoint in the range of responses): 8

In an overstaff situation, what activities are staff expected to perform to "fill-in the gaps"? (Check all that apply) (N = 52)

- 86.5% Project work as delegated to individuals
- 53.8% Outbound calls: patient follow-up, satisfaction surveys, etc.
- 50.0% Database maintenance / data entry
- 46.2% Continuing education activities (e.g., CBT modules)
- 38.5% Mailings / fulfillment
- 36.5% We send staff home
- 26.9% Quality audits
- 25.0% Web / Internet response
- 7.7% Other: several said, "This doesn't happen". Also mentioned; committee work, faxing

Matching Staff to Demand

Continued from page 3

Manage Daily Performance in Real-time

The last step in the process is to monitor and adjust call center staffing real-time. The key to managing performance is to view queue and service metrics regularly throughout the day. Creating staff awareness of service levels and queue management is important. It allows front-line trouble-shooting and often prevents small variances in demand from becoming problematic. Many call centers use readerboards to keep staff informed of calls in queue and current wait times. Others benefit from queuing software which is visible on each workstation screen. With either system, managers must set expectations for quick response to calls building in the queue. A well-defined plan for how to respond to variance is essential to maintain desired performance levels throughout the day.

The steps in responding to staff and demand imbalances are:

- 1) Determine problem severity
- 2) Anticipate service level impact
- 3) Estimate the event duration
- 4) Implement an interim solution

In many cases, fast response will handle short-term peaks in demand. But if the increase in workload continues, or starts to occur more frequently, you should:

- Examine the root cause
- Explore the associated costs to resolve
- Implement long term solutions

For interventions to be effective within a short turnaround time, queue oversight should occur at least every 15-30 minutes. As call demand is building and wait times are starting to increase, assess the possibility of increasing staff:

- Put non-essential work temporarily on hold, such as e-mail response or outbound calls
- Recruit your designated on-call staff
- Adjust pre-scheduled staff: call scheduled staff in early, see if staff can stay later, etc.

In the next 15-30 minutes, if you aren't making any impact on dropping the wait

times start recruiting other in-house staff or remote agents (see the Tool of the Month for specific examples). After staffing has flexed up, assess whether service levels continue to be negatively impacted. If no immediate improvement is seen or the problem appears to be of longer duration, escalate your interventions to the next level. Communicate delay expectations to customers to avoid getting numerous call-backs and offer other resources (e.g., website). Interventions may also include the several options for diverting calls through different channels.

Once the short-term need passes, managers then need to analyze the root causes of the mismatch, as well as the frequency and probability of the problem recurring. Cost-analysis and implementing long-term fixes are the final stage for "chronic" mismatches.

Once the forecast is in place, staff calculated, and schedules created, the day-to-day workforce management begins. Having a process in place to track service level components and making timely adjustments when needed helps to achieve that elusive "just-right" staffing. ☛

Industry Resources

3CN - Call Center Consulting Network
www.3cn.org—Experienced consultants focused exclusively on healthcare call centers

American Academy of Ambulatory Care Nursing (AAACN)
www.aaacn.org—Also ViewPoint bi-monthly newsletter and e-mail

- Telehealth Nursing Practice Administration and Practice Standards
- Telehealth Nursing Practice Core Course (TNPCC)

American Telemedicine Association (ATA) Telenursing
www.atmeda.org—Members receive a Telemedicine Journal

AnswerStat (bi-monthly publication)
www.answerstat.com

Greystone Group
www.greystone.net—providing Internet strategies and solutions for healthcare organizations

Physician Referral and Telephone Triage Times (monthly publication)
Phone: 770-457-6106 Fax: 770-457-4606

Telemedicine Information Exchange (TIE)
Information on telemedicine and telehealth
http://tie.telemed.org produced by the Telemedicine Research Center

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Question of the Month
Participating Call Center Managers
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