



2019

Contact Centre WFM Benchmark Report

The Current State of Workforce Management
in the Global Contact Centre Landscape



 **injixo**



Actionable Insights to Drive Your WFM Success

This report is based on a study conducted **among Workforce Management professionals across the globe** between August 2018 and February 2019. The purpose of the study was to collect relevant insights and industry benchmarks on the current state of Workforce Management in contact centres worldwide.



The report was created by **injixo**, a WFM brand powered by InVision Group, a globally operating software company based in Germany specialising in cloud-based WFM technology and e-learning for contact centres since 1995. With its long-standing experience, focus on continuous improvement, technical excellence and customer value delivery at its core, InVision is a global leader and trusted partner in and around Workforce Management.

How you will benefit from this report



Benchmark your own WFM practices, setup and KPIs against the wider contact centre industry and learn what is currently common practice.



See in which areas you are **up to speed** and where you might be falling behind.



Uncover the latest **trends and actionable insights to drive your WFM success.**



How to Read this Report

The WFM Benchmark Report is split into the main domains of Workforce Management which are Forecasting, Scheduling, Real-Time Management, Reporting and Employee Engagement. Read the survey **top to bottom or jump to specific parts and questions** that are most interesting to you.

To make the reading experience **fun and insightful**, we put the original survey questions front and centre and kept additional texts to a minimum. If you are not familiar with a specific topic, read the short definitions and explanations that accompany many sections. For **key insights at a glance**, take a look at the Executive Summary and the key findings below the charts.

If you are looking for **best practices to take action**, visit the [injixo Blog](#), subscribe to our monthly blog newsletter or download free e-books, videos and webinars from the injixo WFM [Resources Library](#).

You can find more information concerning the methodology and demographics of the survey at the end of this report.





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Executive Summary & Key Insights

Virtually every large company uses **Workforce Management (WFM) technology** to enable superior customer experiences through outstanding customer service while improving employee engagement and reducing business costs. The entire topic of WFM is driven by the premise to **continuously optimize operational performance** to meet the growing demands of customers and their rising expectations towards high-quality service in an omni-channel world.

While many large contact centres already have a WFM system in place, the majority of smaller centres (< 50 employees) are not using a dedicated tool. In fact, roughly **24% of all contact centres still use spreadsheets** such as Excel as their primary planning tool.

However, when it comes to delivering exceptional customer service experiences across multiple touchpoints in today's increasingly digital and competitive market place, companies need to adapt to the **new rules of customer service**. Omni-channel availability and accessibility, personalised customer support as well as a vast amount of self-service options and service automation technologies are becoming crucial to ensure a smooth CX to sustainably retain

and delight your customers every day anew. These trends can be both a blessing and a curse if your business doesn't know what's happening now and in the future and how to respond accordingly.



Thus, companies must **embrace, master and upgrade new technologies** to remain competitive and to successfully accommodate sustainable business growth.

Workforce Management technology has a strong **return on investment (ROI)** that companies can and should leverage to increase operational efficiency, reduce costs and drive customer satisfaction in the long-term.



We have compiled a list of the most important take-aways and key insights of this report that will help you get the bigger picture of where the industry and WFM are heading.



Chat and Social Media are getting more workload share in contact centres. They are also more often subject to forecasting.



93% of contact centres measure forecast accuracy, but only 53% measure **schedule efficiency** and only 78% **schedule adherence**.



Service quality KPIs are by far the most popular KPIs in contact centres.



Planners would love to invest more time in **analysis and general process improvements**.



Most contact centres have **dedicated people** for forecasting, scheduling, real-time management and reporting tasks.



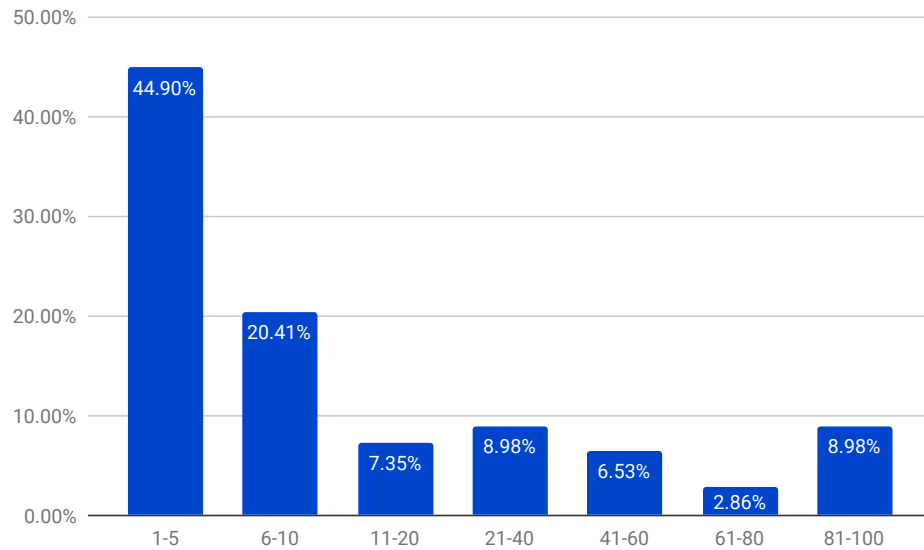
Almost 50% of contact centres rate their **employee satisfaction** as „good“ or „very good“.

Wait, there is much more!

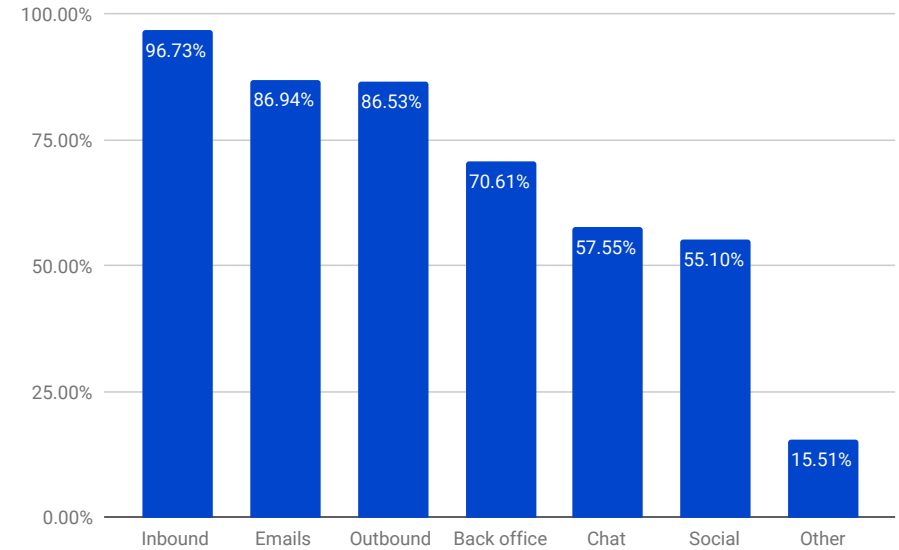
Explore helpful & relevant industry insights on both an operational and strategic level and get all the details below!

1 General Contact Centre Benchmarks

1.1 How big is your planning team (FTEs)?



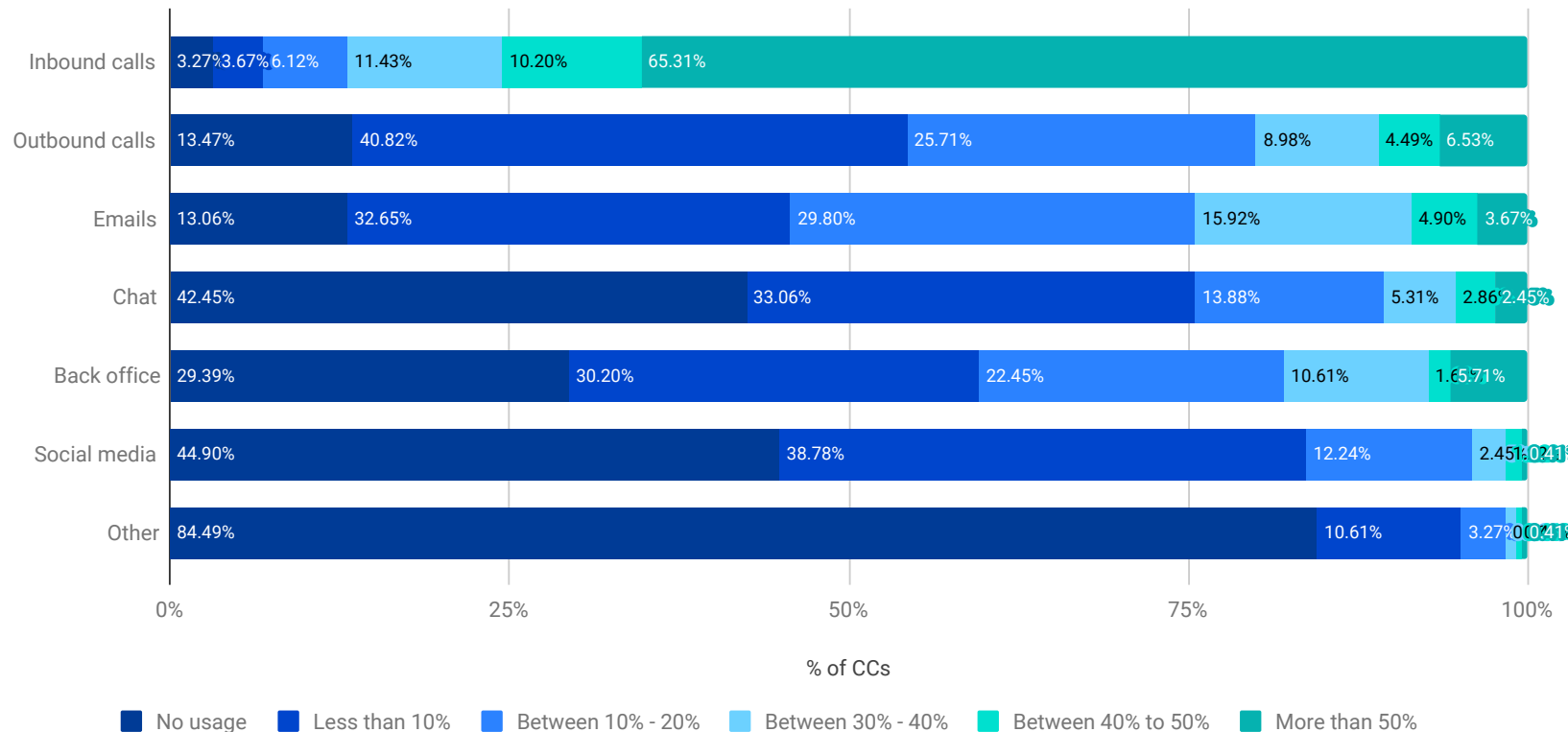
1.2 What channels do you handle?



In the past, contact centres were mainly dealing with phone calls, thus the name 'call centre'. Today, call centres have been re-labeled as contact centres and cover a wide range of customer communication channels.

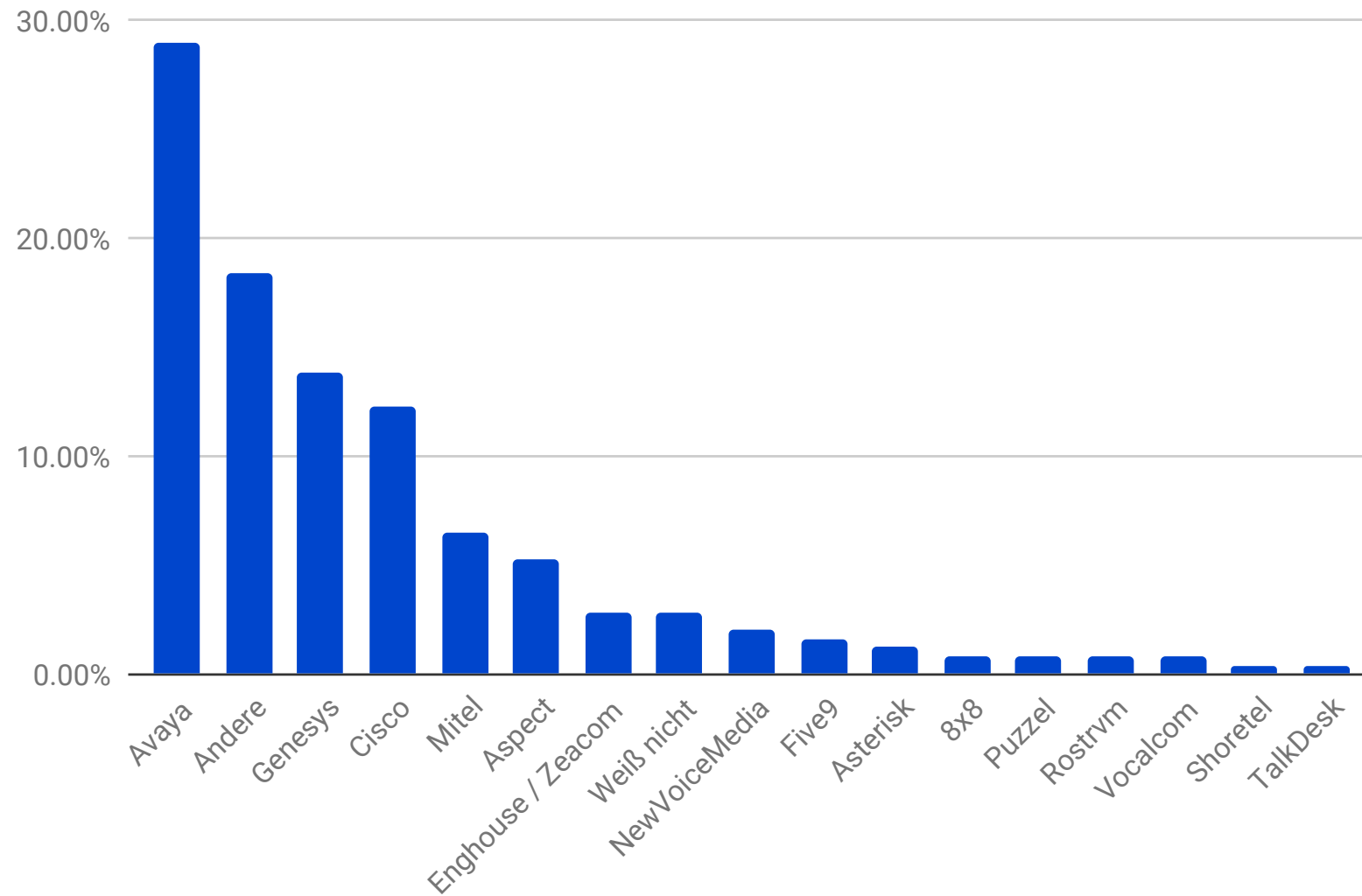
- ▶ New channels like chat and social media are handled in more than 50% of all contact centres.
- ▶ Inbound calls are still the primary channel handled by contact centres.

1.3 What percentage of your workload does each channel represent in your contact centre?

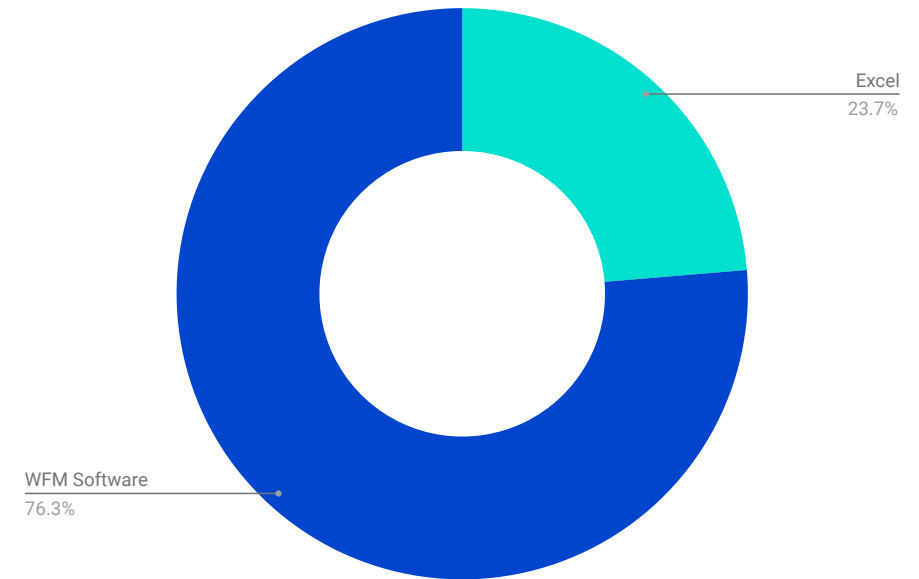
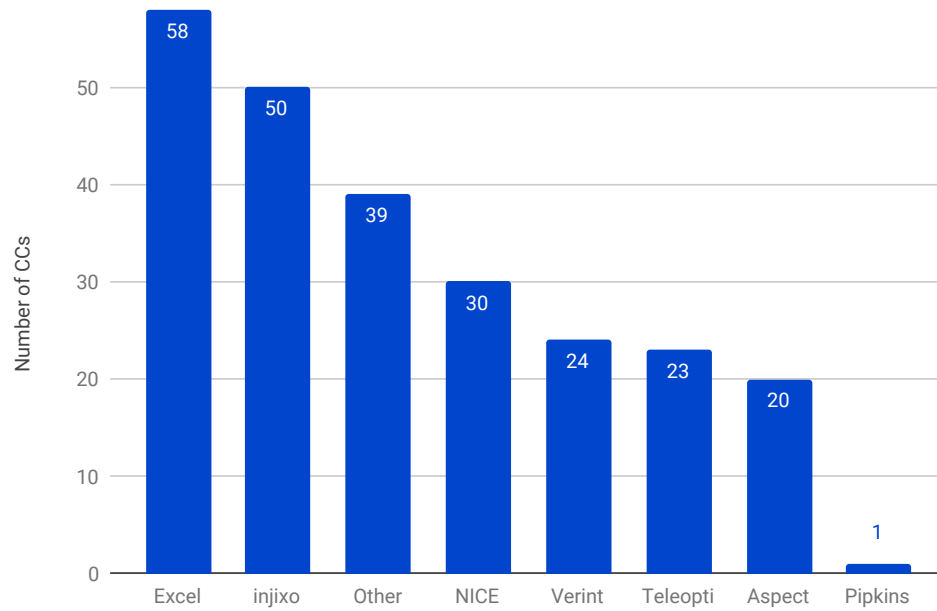


- Inbound is still by far the number 1 customer communication channel in contact centres. But other channels are catching up.
- In 24% of contact centres, chat takes up 10% or more of the total workload.
- In 16% of contact centres, social media takes up 10% or more of the total workload.

1.4 Which communication platform handles the majority of your contacts?

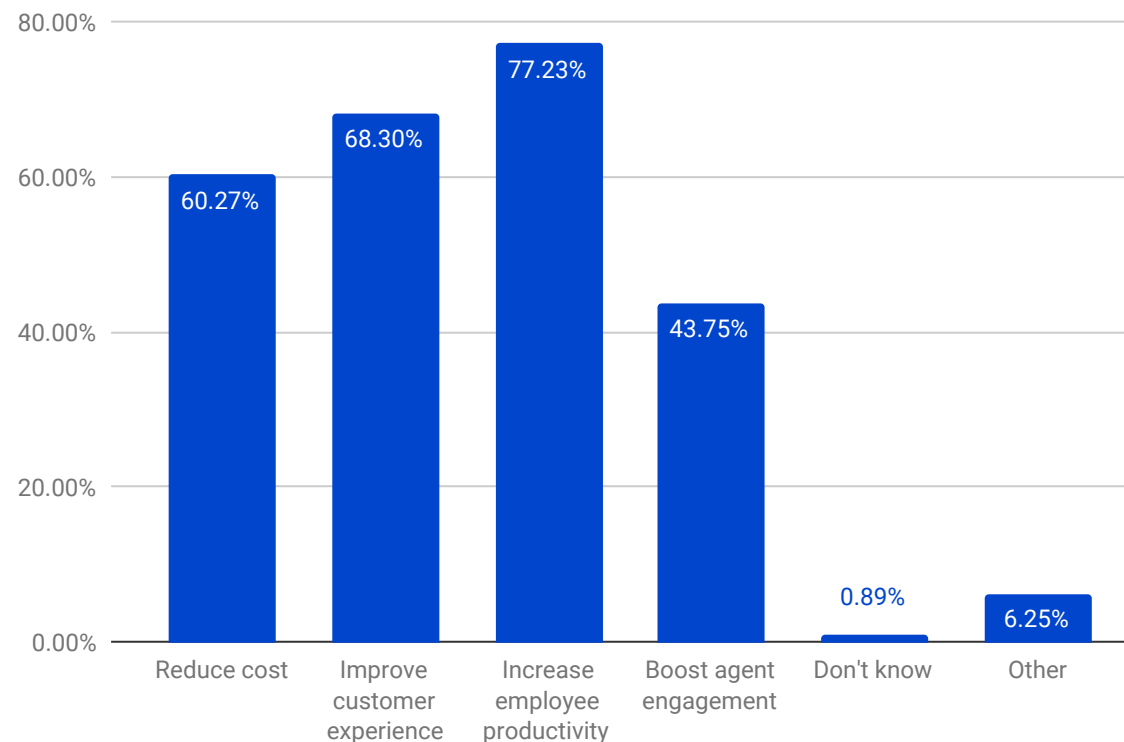


1.5 What is your current workforce planning tool?



- ▶ Today, 76% of contact centres are using WFM software.
- ▶ With 24%, the use of spreadsheet tools is still surprisingly high.

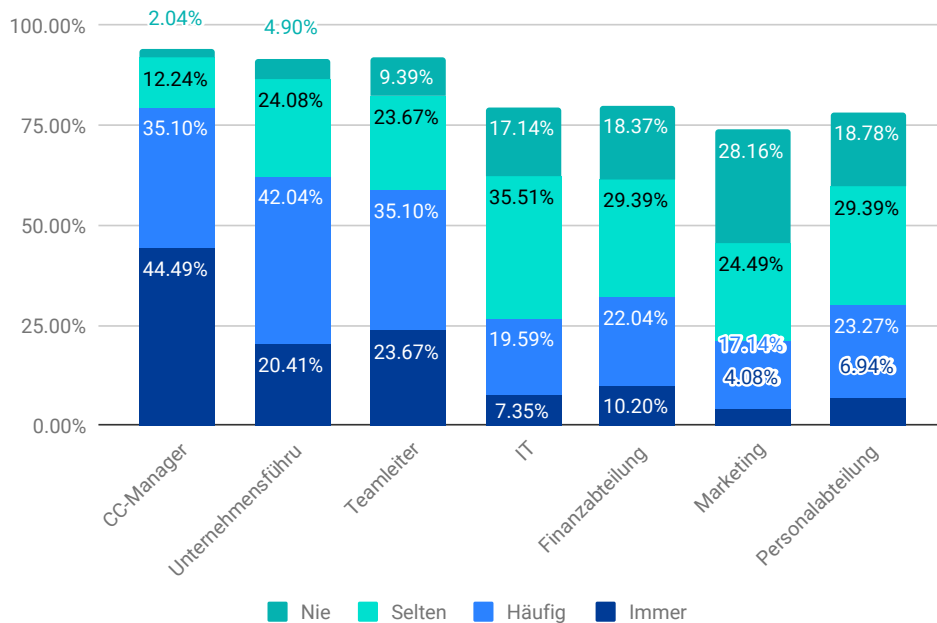
1.6 What are your main goals in using Workforce Management solutions?



- The main goals in using a dedicated Workforce Management solution are productivity improvements, ensuring a better customer experience as well as cost reductions.
- For 75% of contact centres, increasing employee productivity is an important goal.

Professional WFM tools can go a long way in improving the Workforce Management process in contact centres and boosting key KPIs related to customer experience, employee engagement and overall contact centre performance.

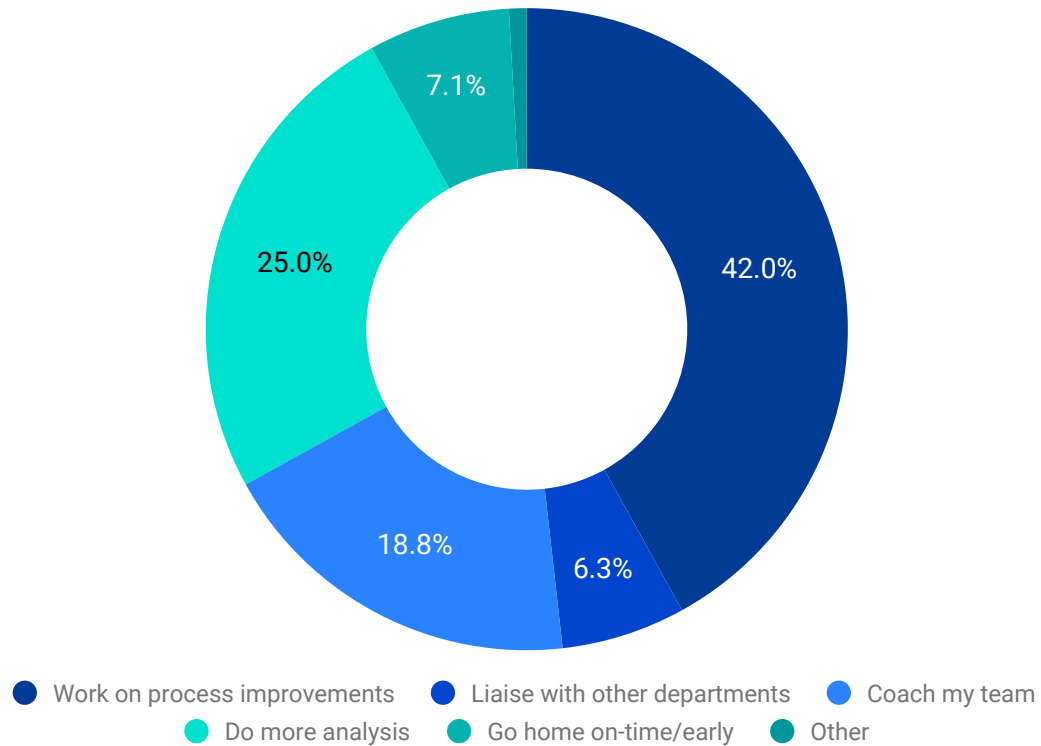
1.7 From which parts of the business does the planning function get buy-in and to what degree?



- Planners get most support from CC Managers, closely followed by C-Level Management and Team Leaders.
- Marketing is the function from which planners get the least buy-in.

In order to be productive, planners have to collaborate effectively with different roles inside and outside the contact centre.

1.8 If you had a magic wand that could free up 3 hours of working time each week, what's the main thing you would do with those hours?

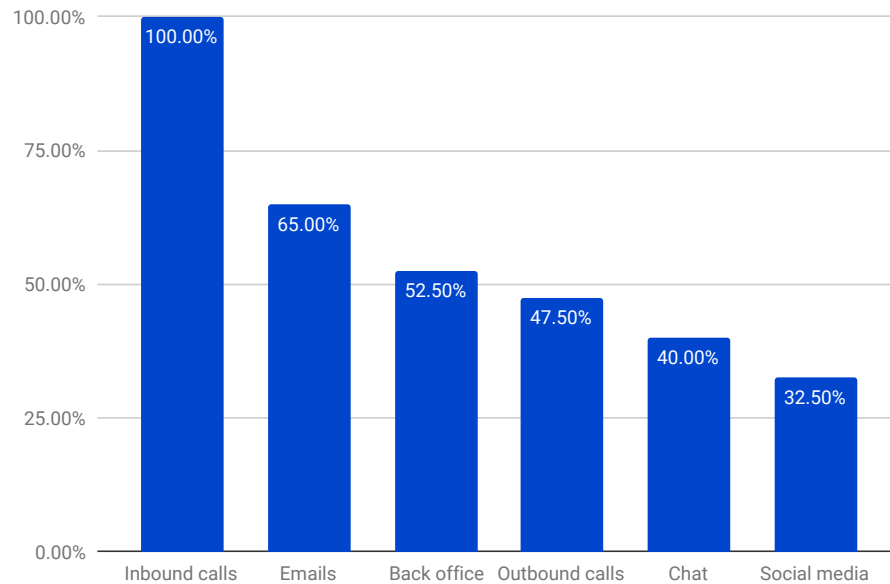


- Most planners would love to invest more time in analysis and general process improvement.

2 Forecasting Benchmarks

Contact volumes (the number of incoming calls, emails etc.) and handle times tend to fluctuate a lot in contact centres throughout the day, week, month and year. That's why forecasting workloads and required staff is essential for contact centres in order to provide better service and cut unnecessary costs.

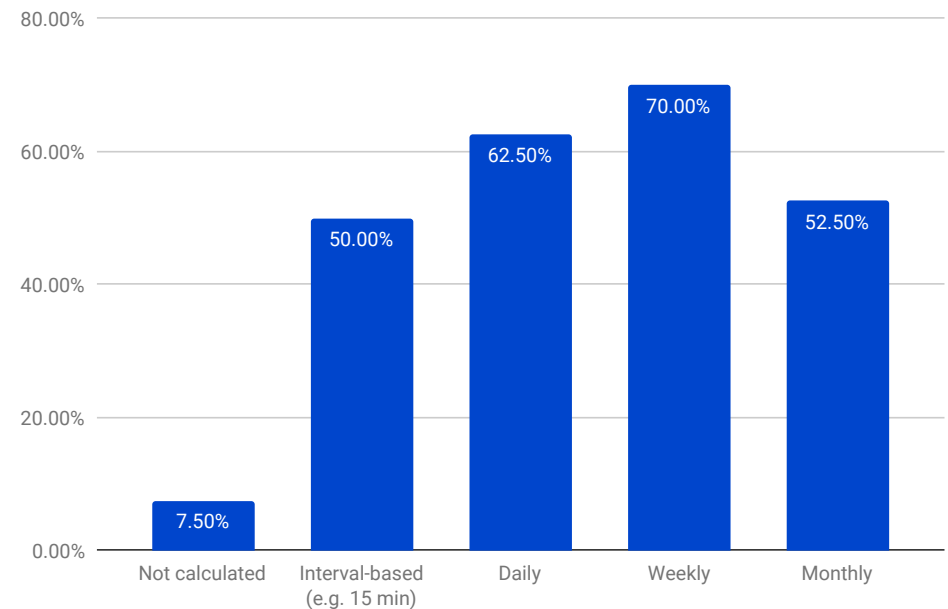
2.1 For which channels do you forecast and calculate required staffing?



Forecasting inbound calls is a must-have in contact centres, but also channels that were exotic a few years ago are now being forecasted more often.

- Forecasting chat and social media gets more popular.
- Inbound calls remain the most commonly forecasted channel in the contact centre, closely followed by email and back office.

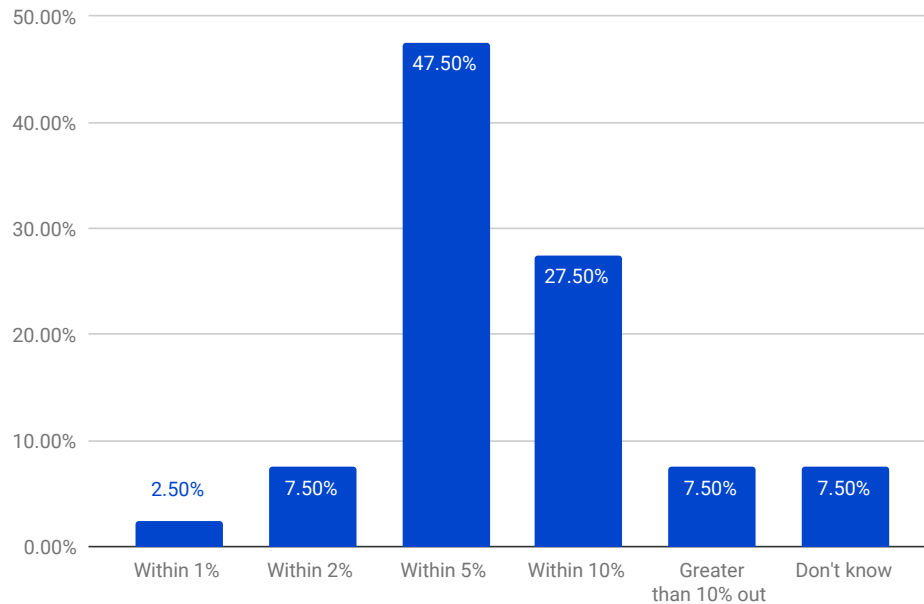
2.2 Do you calculate forecast accuracy and if so, over what period?



Forecast accuracy is calculated by comparing the forecast with the actual call volumes and handle times. It's used to evaluate forecast quality and to improve the forecasting process.

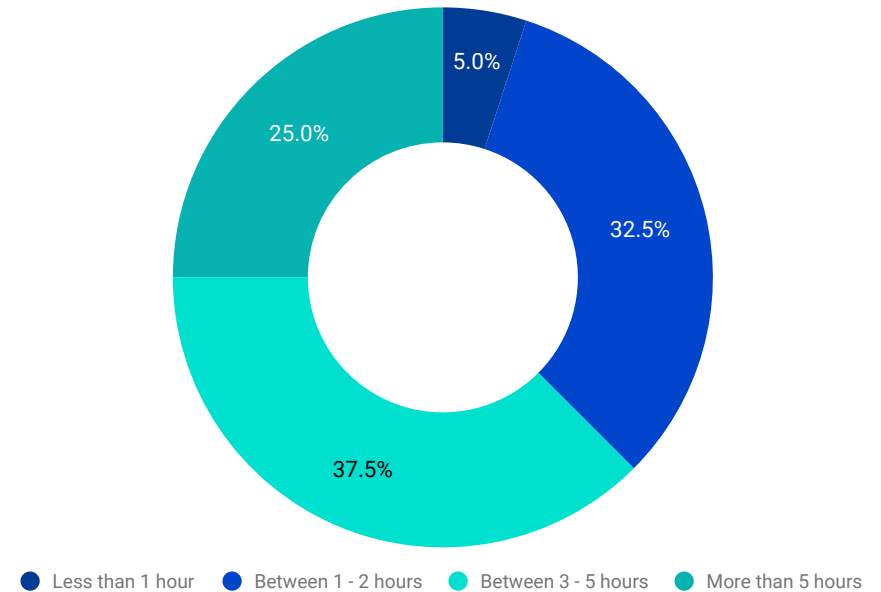
- 92% of contact centres calculate forecast accuracy.
- Contact centres typically calculate forecast accuracy for multiple time periods in parallel, with weekly and daily intervals being the most common periods.

2.3 In a typical week, how accurate are your forecasts?



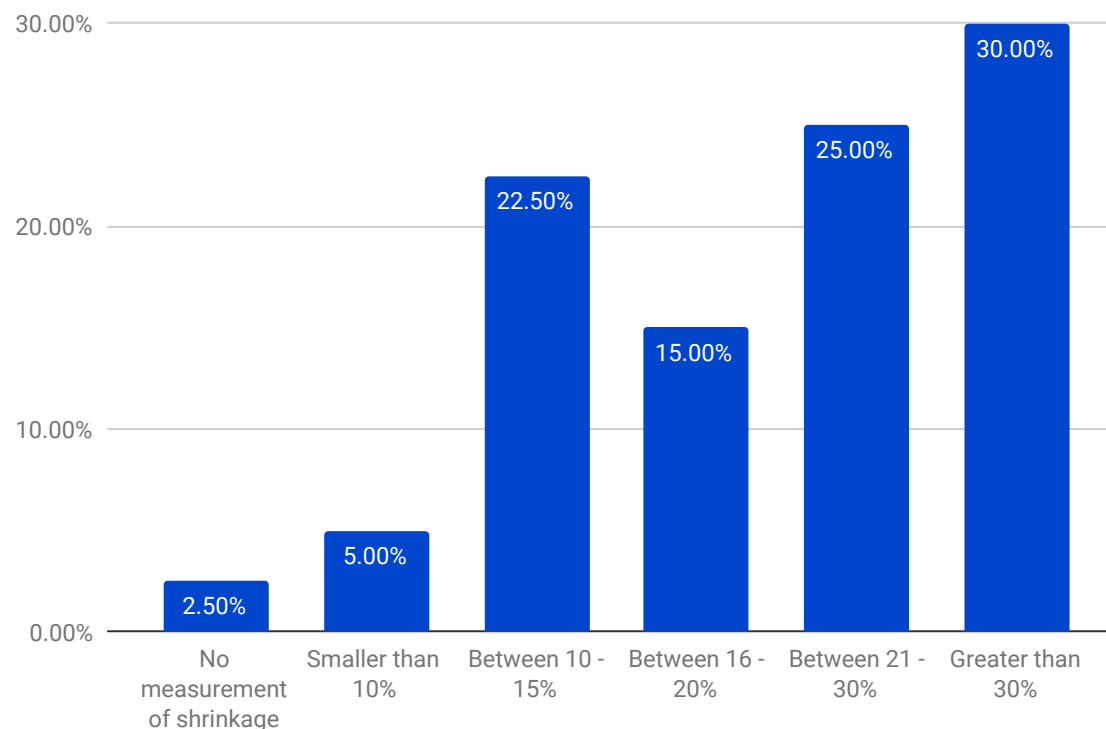
- ▶ 90-95% accuracy is achievable for most contact centres.
- ▶ The majority of contact centres achieves a forecast accuracy within 5% deviation between plan vs. actual in a typical week.

2.4 In a typical week, how much time do you spend on forecasting (in hours)?



- ▶ In a typical week, the majority of planners spends between 1 and 5 hours on forecasting.
- ▶ Only 5% actually reported to need less than 1 hour for forecasting.

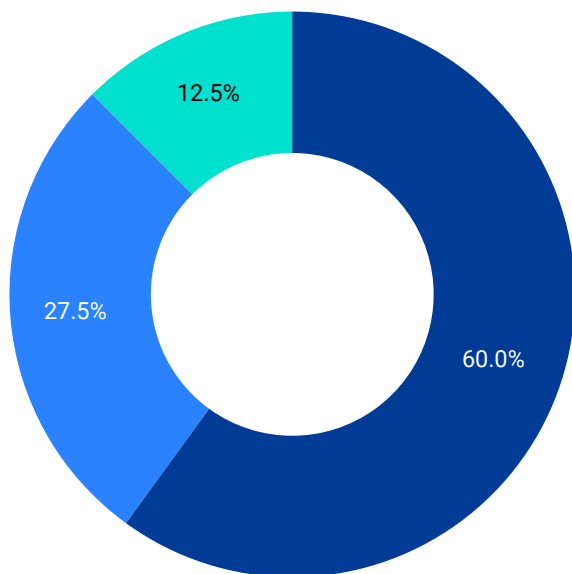
2.5 Do you report on shrinkage? If yes, what is your typical shrinkage (in%)?



- ▶ Shrinkage levels below 10% are very rare.
- ▶ Higher shrinkage rates of 21% upwards are most common.
- ▶ Shrinkage differs a lot from contact centre to contact centre.

Shrinkage is the time agents spend with unproductive activities such as breaks, meetings, coaching, holidays and sick leave. 30% shrinkage means that agents spend 30% of their time unproductive and 70% productive.

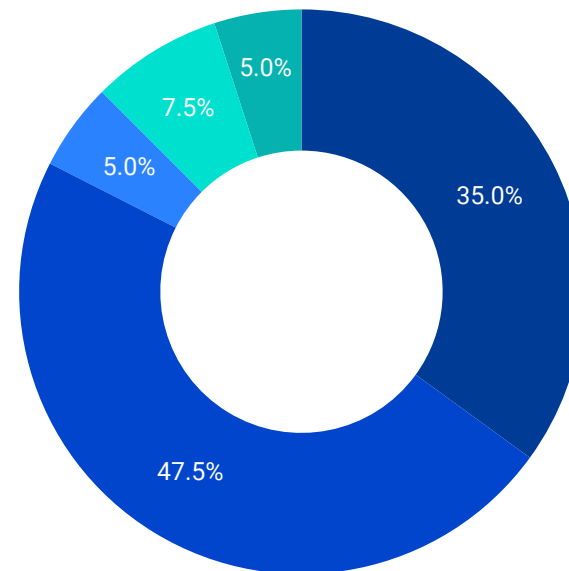
2.6 For your Contact Centre, what is more important in forecasting?



● Predict required staffing ● Enable optimised scheduling ● Long-range planning

- ▶ 60% of planners state that predicting staffing requirements is the most important goal in forecasting.
- ▶ Only a low number (13%) of planners focuses on long-range planning.

2.7 Do you have a dedicated person or team to do forecasting and how large is it?



● 1 person ● Between 2 - 5 people ● Between 6 - 10 people ● More than 10 people
● No dedicated team

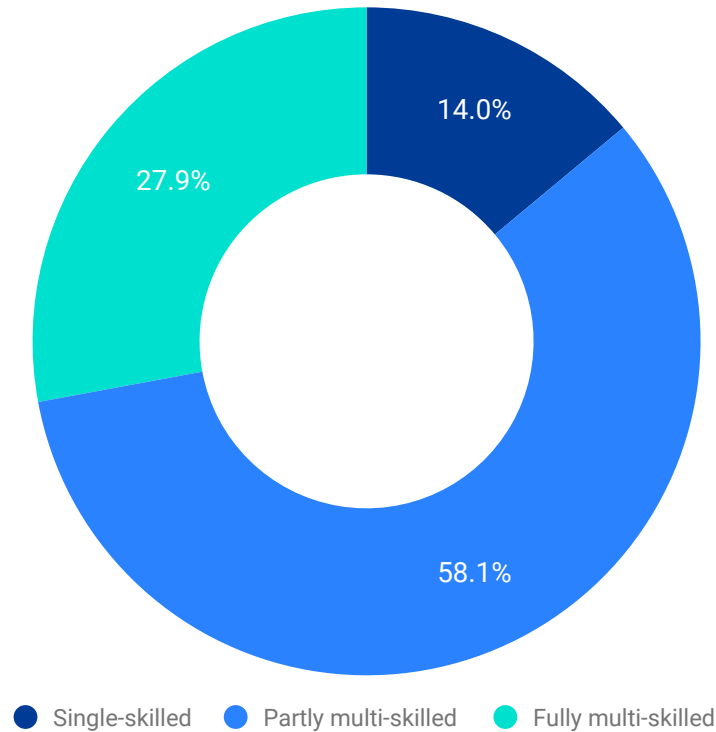
The size of the forecasting team is typically dependant on the size and number of sites of the contact centre.

- ▶ The usual size of a planning team ranges between 2 to 5 people, particularly in medium-sized contact centres that represent the largest portion of this survey's participants.

3 Scheduling Benchmarks

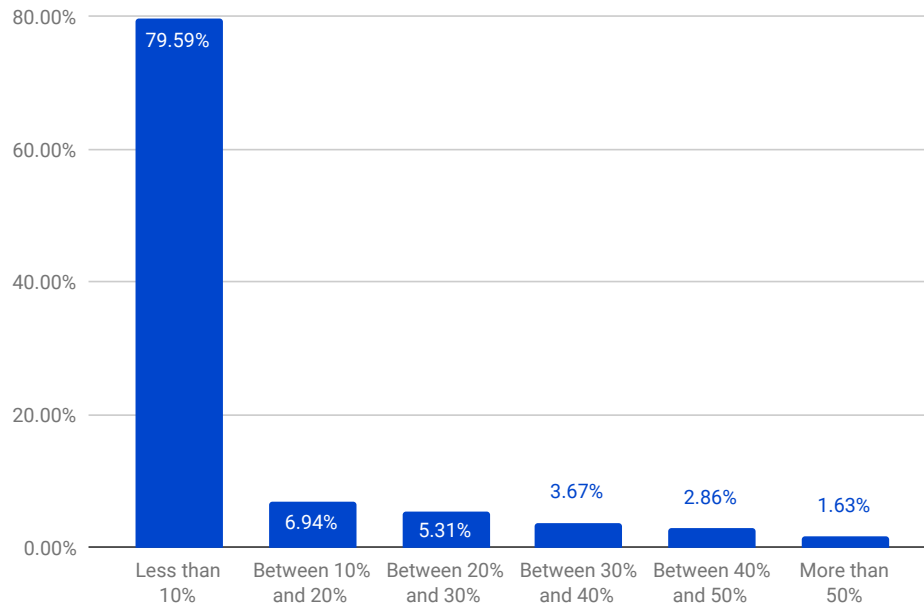
Scheduling is based on the forecast of agent requirements and builds schedules that use the contact centre's available agents most effectively to minimise both over- and understaffing.

3.1 Please indicate the skill level of the majority of your contact centre agents.



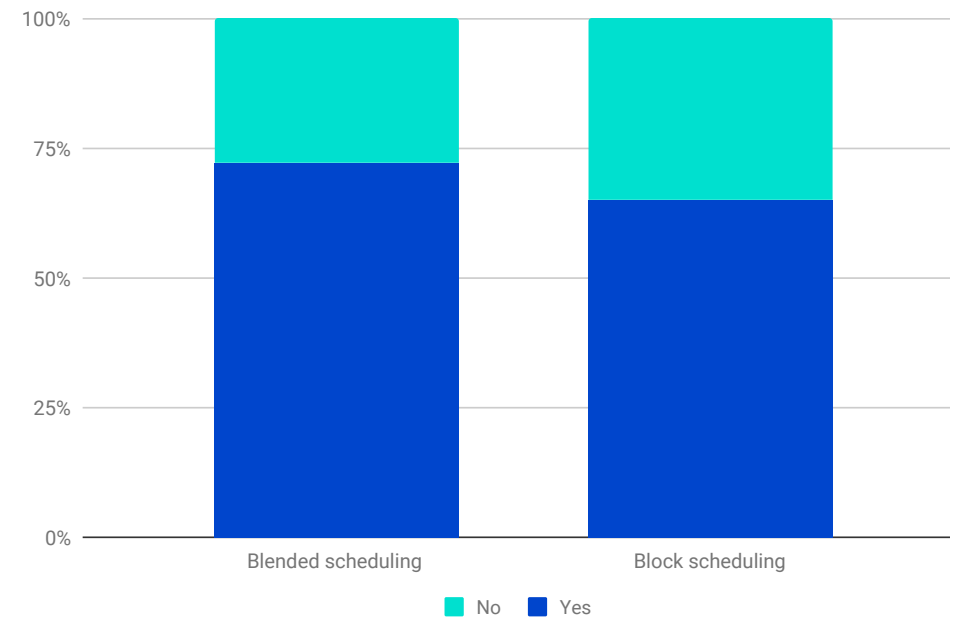
Single-skilled agents are proficient in handling only one type of contact. Multi-skilled agents are able to handle different contact types. They could e.g. switch between answering service calls, complaint calls and requests posted on social media. Having multi-skilled agents in a contact centre compared to only single-skilled typically leads to more effective and flexible schedules and better service levels.

3.2 What percentage of your agents are home based/ work from home?



- ▶ Home based agents have still not become mainstream in contact centres.
- ▶ Only 7% of contact centres stated that between 10% and 20% of their agent staff are home based.

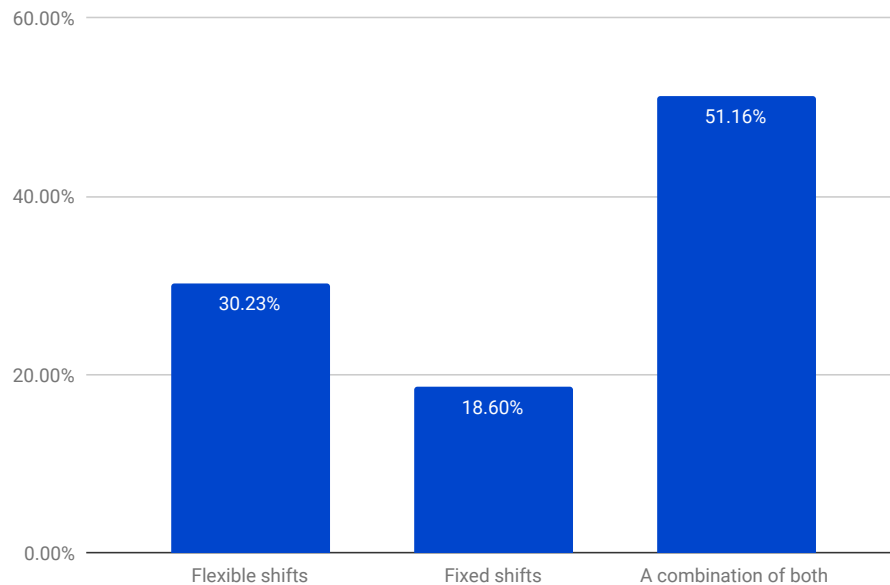
3.3 Do you use any of the following scheduling techniques?



Blended scheduling means agents handle any contact for which they are skilled at any time. Block scheduling means agents are scheduled to handle specific activities for specific periods.

- ▶ The majority of contact centres (> 65%) utilises techniques such as blended and block scheduling.

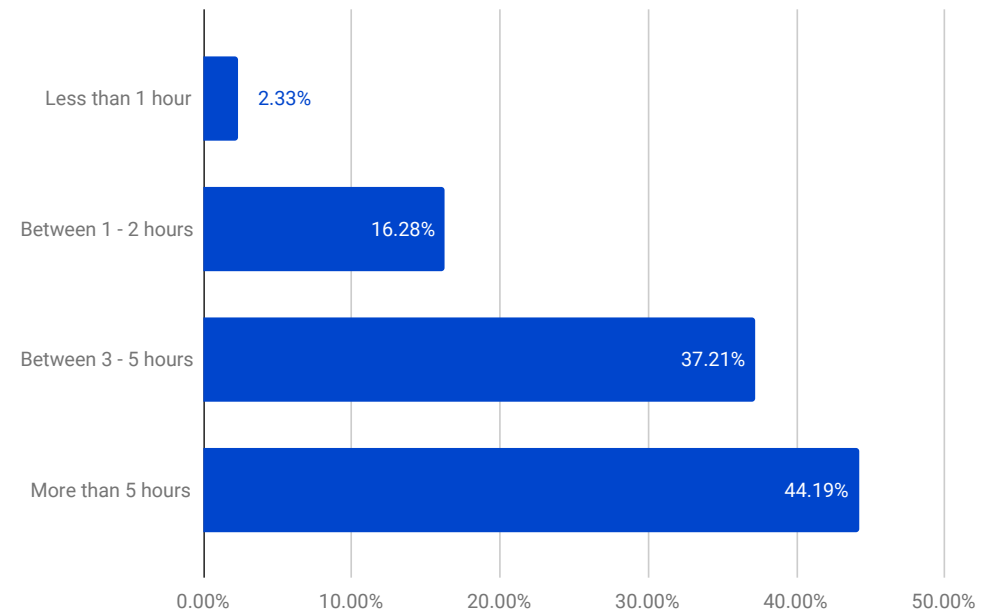
3.4 Please select the type of shift worked by the majority of your agents.



Flexible shifts give planners much more options to match agent schedules with fluctuating workloads.

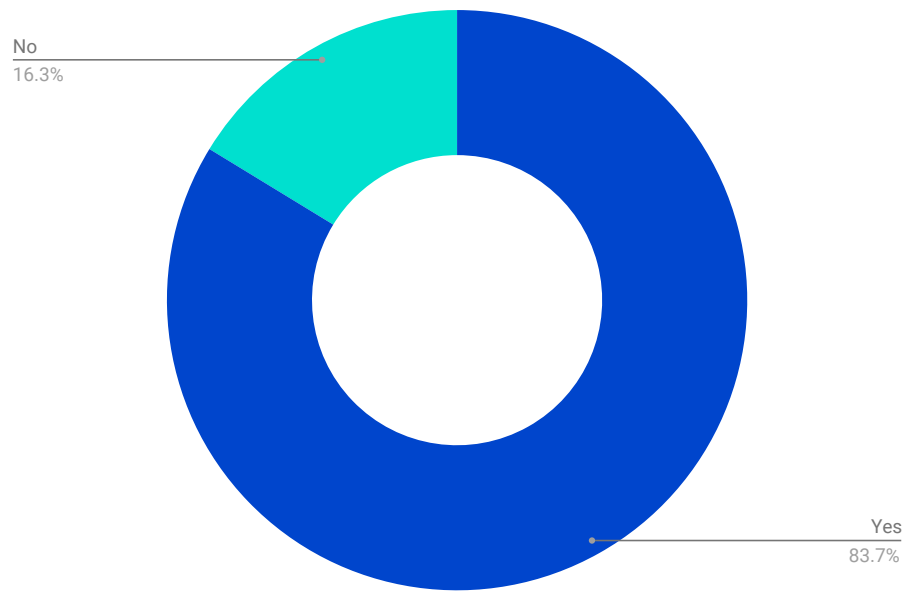
- A combination of flexible and fixed shifts is most common in contact centres.

3.5 In a typical week, how much time do you spend on building schedules (hours)?



- More than 40% of planners indicated to spend more than 5 hours on scheduling activities in a typical week.
- Only a small portion (2%) actually manage to create schedules within an hour in a typical week.

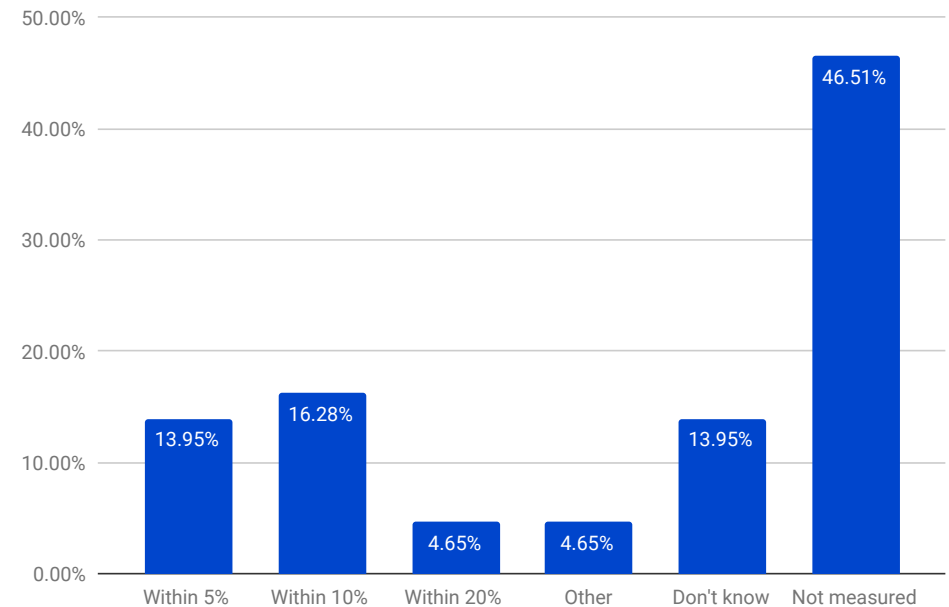
3.6 Do you schedule breaks and lunches?



Scheduling breaks and lunches is a great way to fine-tune schedules and mitigate over- and understaffing. This task gets much easier if it is done with a proper WFM Tool instead of spreadsheets

- The clear majority of contact centres schedules breaks and lunches.

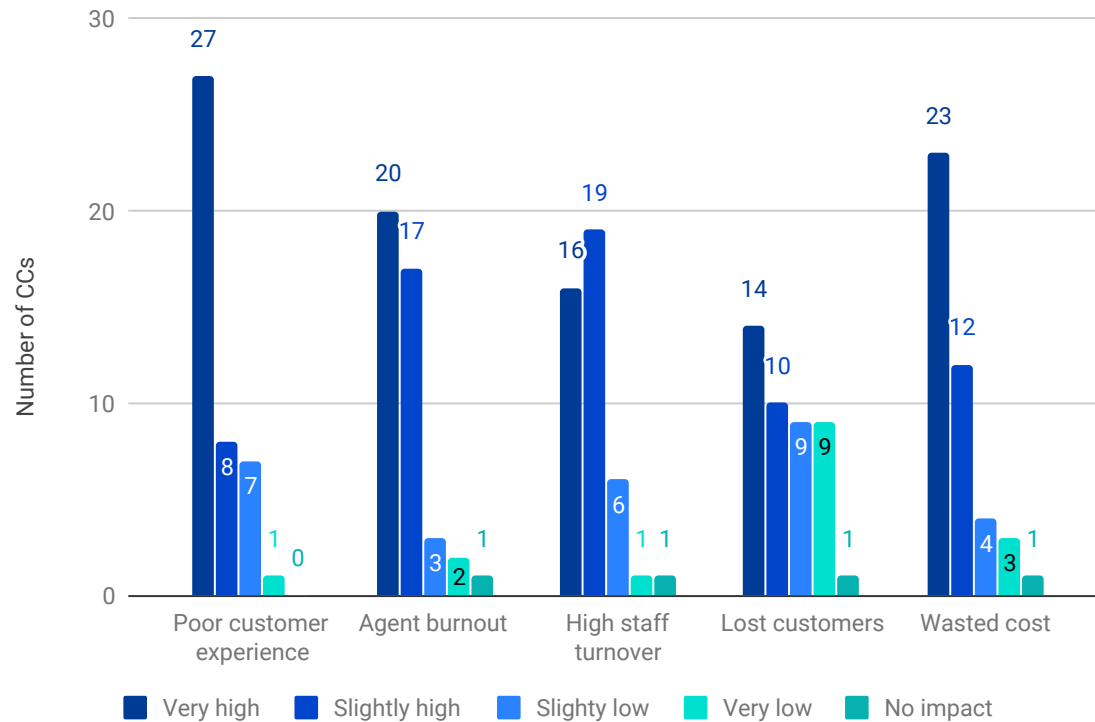
3.7 Do you measure schedule efficiency and what is your schedule efficiency (in %) in a typical week?



Schedule efficiency measures how well a schedule matches the staffing requirements - which have been calculated based on the forecast workload, the contact centre's service level goal and the shrinkage numbers. Schedule efficiency is essential for optimising the scheduling process.

- Surprisingly, more than 46% of contact centres don't calculate schedule efficiency.
- 14% even indicated they don't know their schedule efficiency in %.

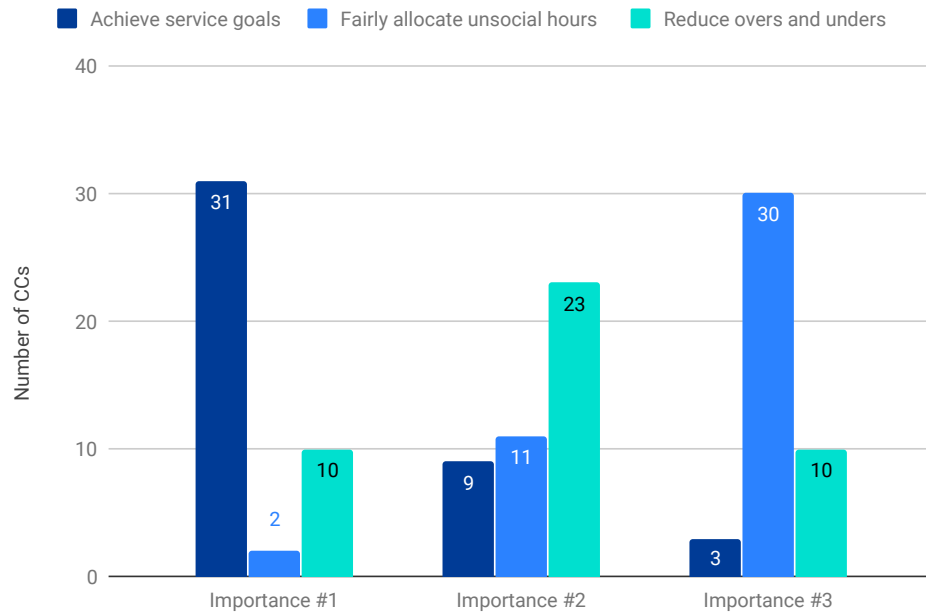
3.8 In your opinion, what are the consequences of over- and understaffing? Please indicate the level of impact on the business.



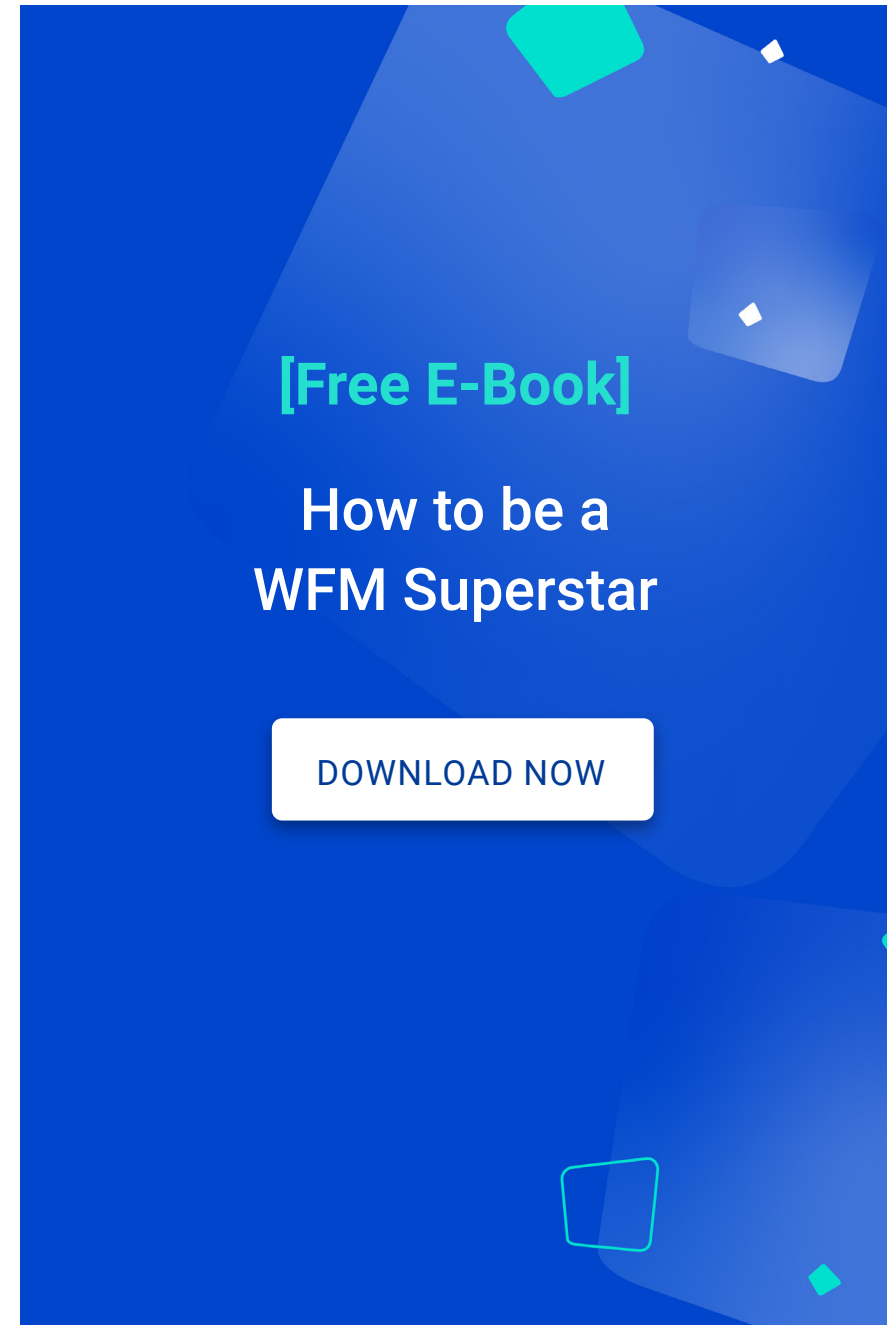
A contact centre that is overstaffed has more agents than needed, one that is understaffed has less than needed. If the number of agents doesn't match the workload, customers as well as agents and the contact centre are affected in a negative way.

- The majority of contact centres lists poor customer experience, cost inefficiencies and agent burnout as the most crucial consequences of over- and understaffing that negatively affect the business.

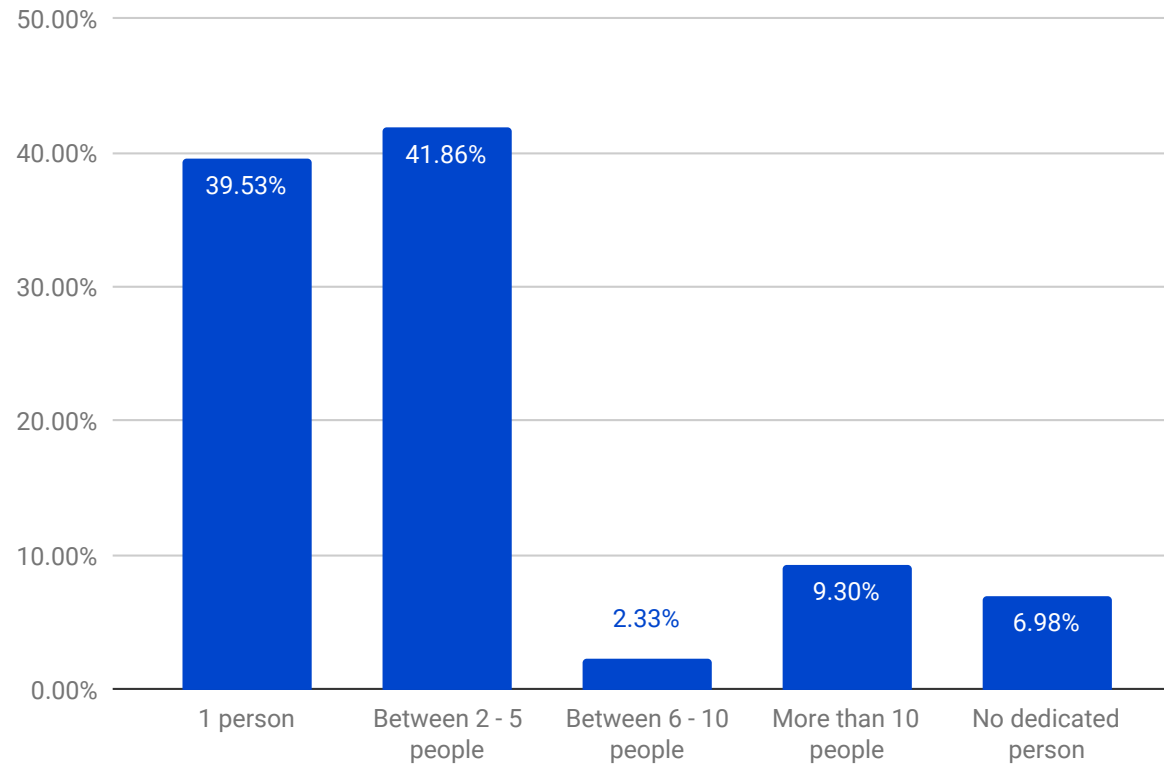
3.9 What are your main goals in scheduling agents? Please rank according to the perceived importance in your contact centre.



- ▶ Achieving service goals is by far the highest priority for contact centres when scheduling agents.
- ▶ Fairly allocating unsocial hours is the least important goal.



3.10 Do you have a dedicated person or team to do scheduling and how large is it?



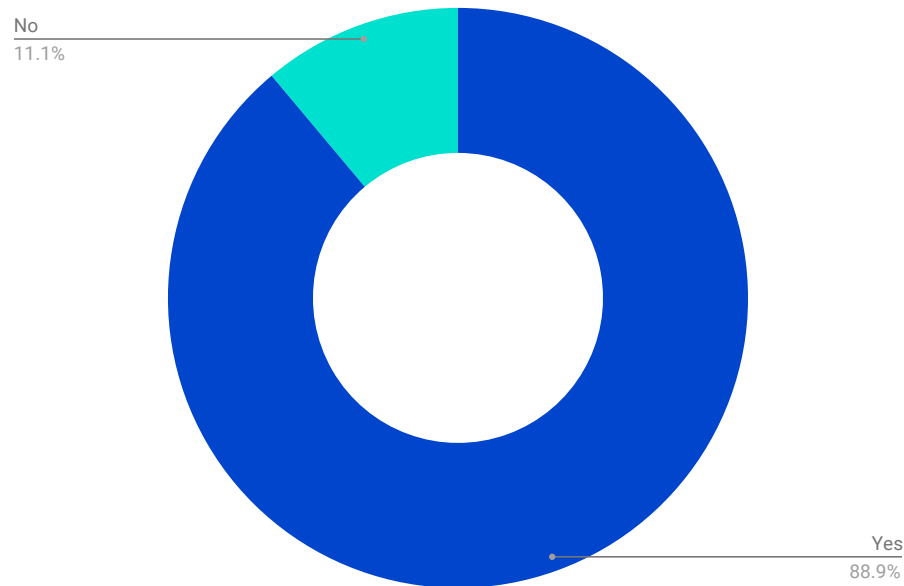
Depending on the size of the contact centre, the number of people in the scheduling team varies.

- The majority of contact centres employs a dedicated person to look after scheduling.
- The usual size of a scheduling team ranges between 2 to 5 people, particularly in medium-sized contact centres that represent the largest portion of survey participants.

4 Real-Time Management Benchmarks

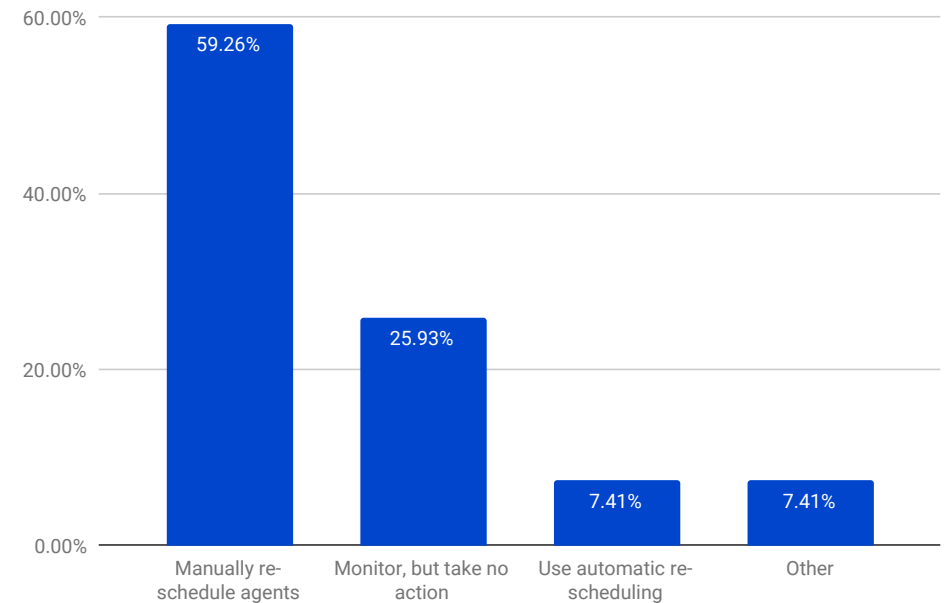
In real-time management (also called intraday management), workload and performance are constantly monitored, analysed and compared to the plan throughout the day. In case of significant deviations, actions are performed to reduce or prevent over- and understaffing. Typical reasons to act are: Contact volumes or handle times are higher or lower than expected or the number of available agents is too low, e.g. due to sickness.

4.1 Do you currently monitor your forecast volumes versus the actual?



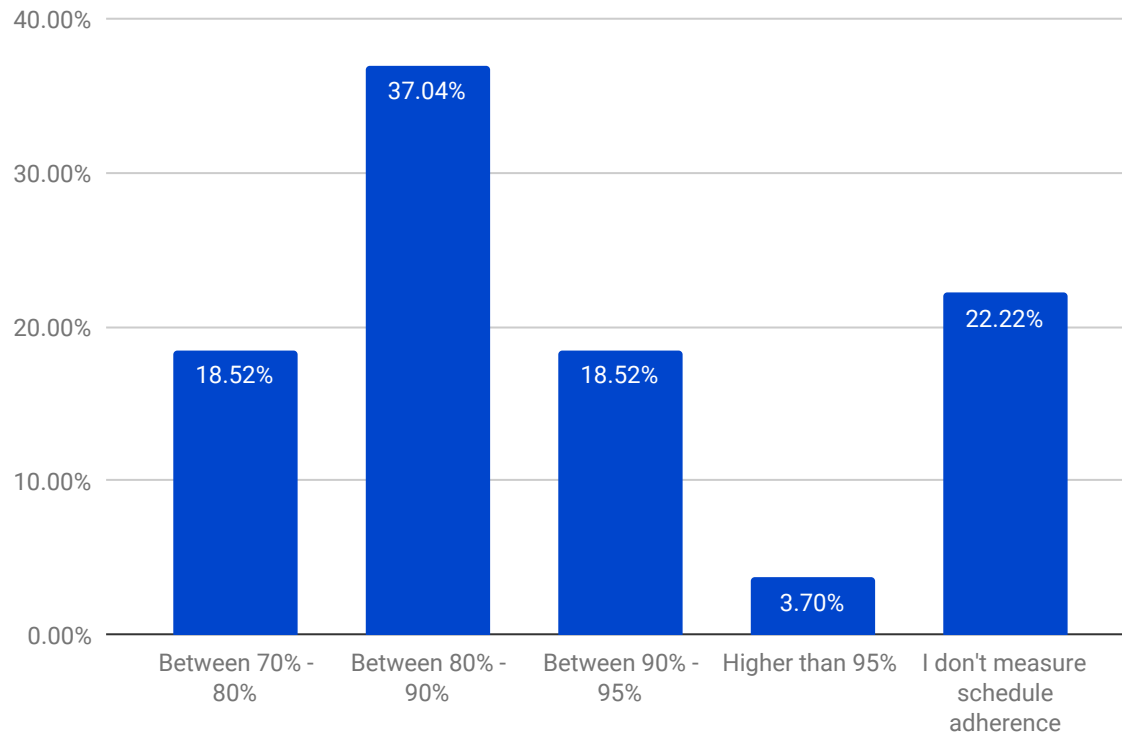
- The clear majority of contact centres monitors forecast volumes versus the actual workload.

4.2 If you see a variance between forecast and actual, what is your typical reaction?



- The most-stated reaction towards variances between forecast and actual is to manually re-schedule agents.
- More than 25% of contact centres stated that after noticing a variance, no corrective action was taken to adjust the schedules accordingly

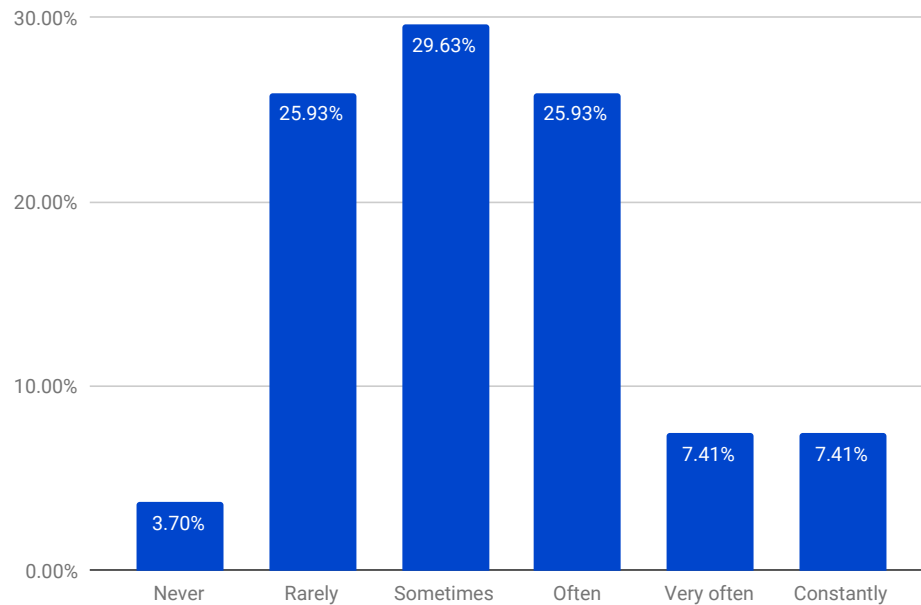
4.3 Do you measure schedule adherence in your contact centre and what is your typical adherence (in %)?



- Most contact centres have a schedule adherence lower than 95%.
- More than 20% of contact centres stated that they don't measure schedule adherence.

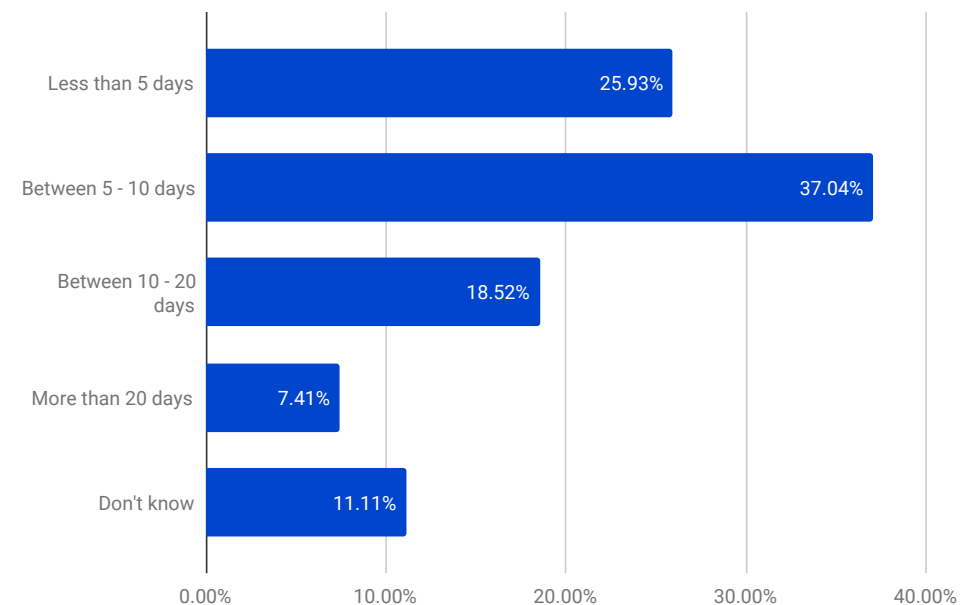
Schedule adherence measures how well agents are adhering to their schedules. If schedule adherence is low, the entire planning process is pointless. However, a schedule adherence of 100% is not advisable as there will always be longer calls that stretch into agents' breaks and other schedule deviations that are actually a good thing.

4.4 On a typical day, how many times do you need to make changes to schedules?



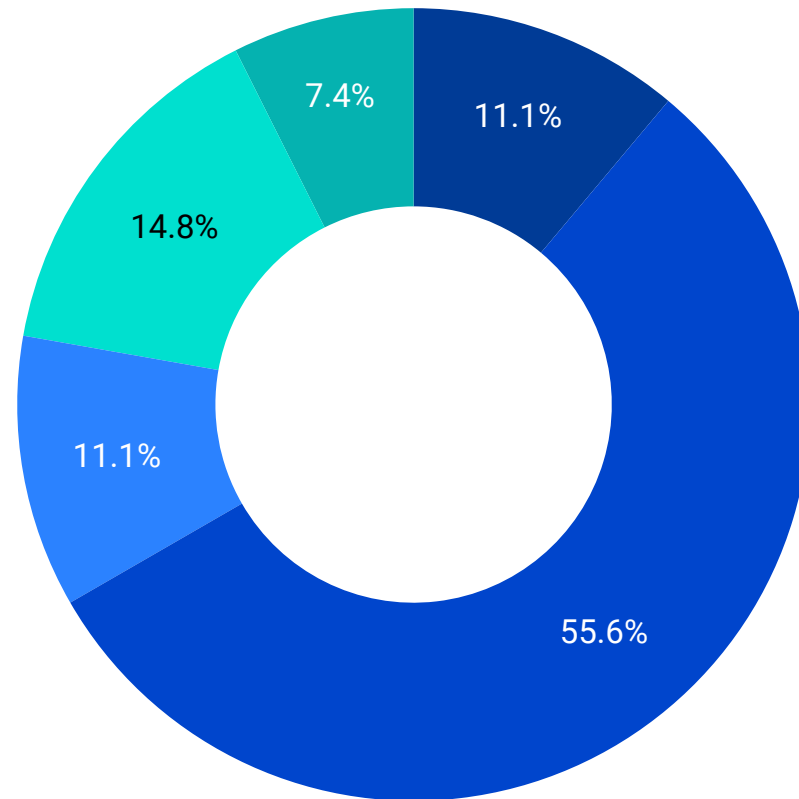
- In most contact centres, planners regularly re-schedule throughout the day.
- Less than 10% stated that they constantly adjust schedules throughout the day.

4.5 What is the average number of sick days per employee per year?



- For 37% of contact centres the average number of sick days is 5 to 10 days.

4.6 Who looks after real-time or intraday management in your contact centre?

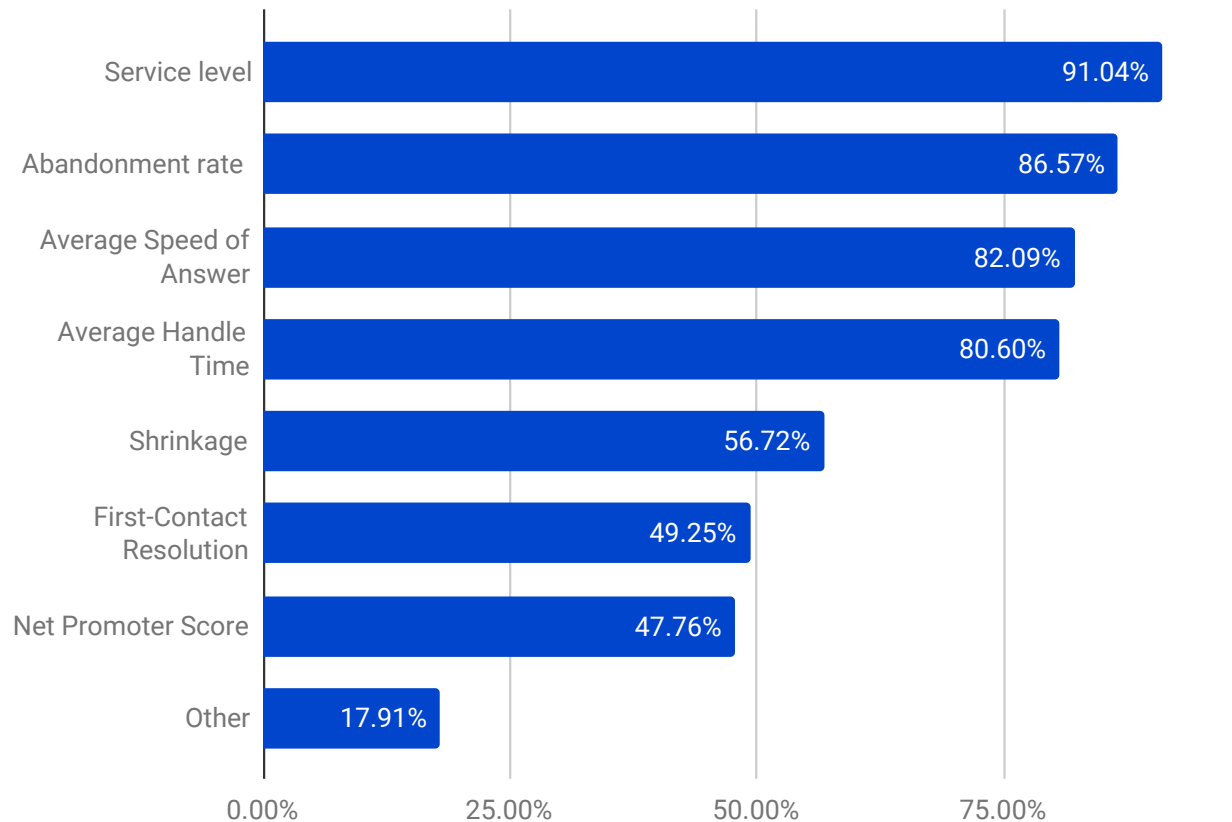


● Planning ● Real-time Team ● Team Leaders ● Mixture ● Other

- Many contact centres have dedicated real-time management teams.
- In 11% of contact centres team leaders are responsible for real-time management.

5 Reporting Benchmarks

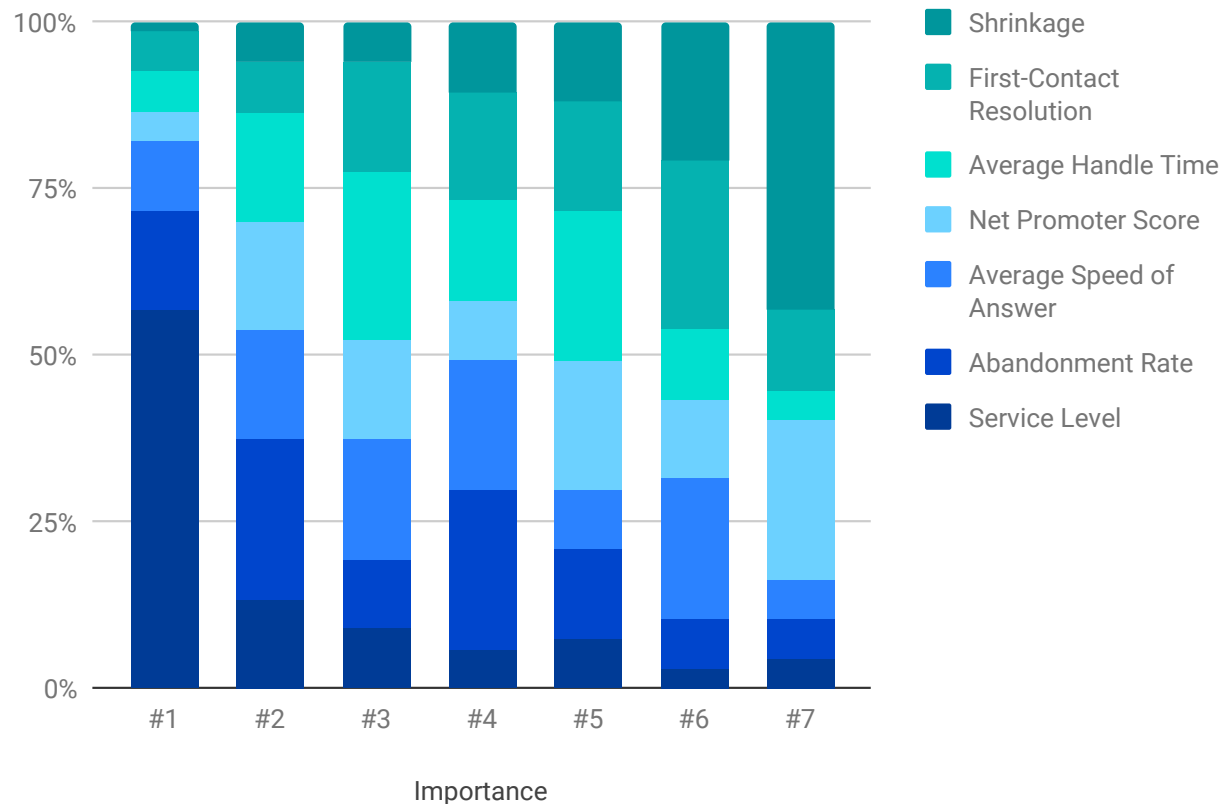
5.1 Which of these KPIs do you measure?



- ▶ Service level is still the favourite KPI of most contact centres as reported by 91% of contact centres.
- ▶ Abandonment Rate (87%), Average Speed of Answer (82%) and Average Handle Time (80%) are also very popular.
- ▶ Net Promoter Score, however, is only measured by 48% of contact centres that participated in this study.

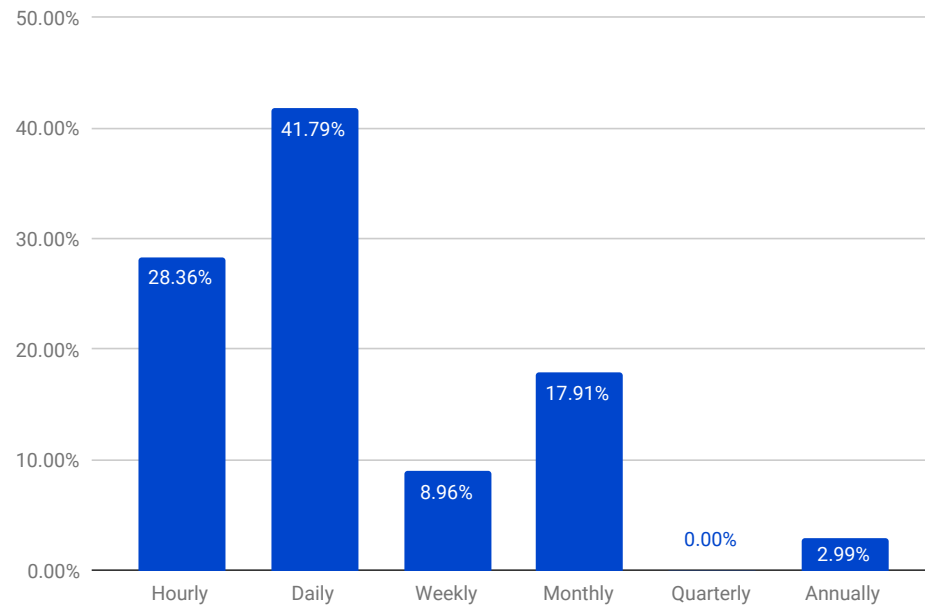
KPIs are used to track the success of contact centre operations. Most contact centres primarily aim at providing outstanding service. This is also reflected in the three top rated KPIs in this chart which are all service quality metrics.

5.2 Which is your most important KPI? Please make a ranking based on the KPI relevance for your CC operations (Position 1 = most important and 7 = least important)



- The most important KPI is Service Level, followed by Abandonment Rate, Average Speed of Answer and Average Handle time.
- Shrinkage is the least important KPI with more than 40% of contact centres ranking it on position 7/7.

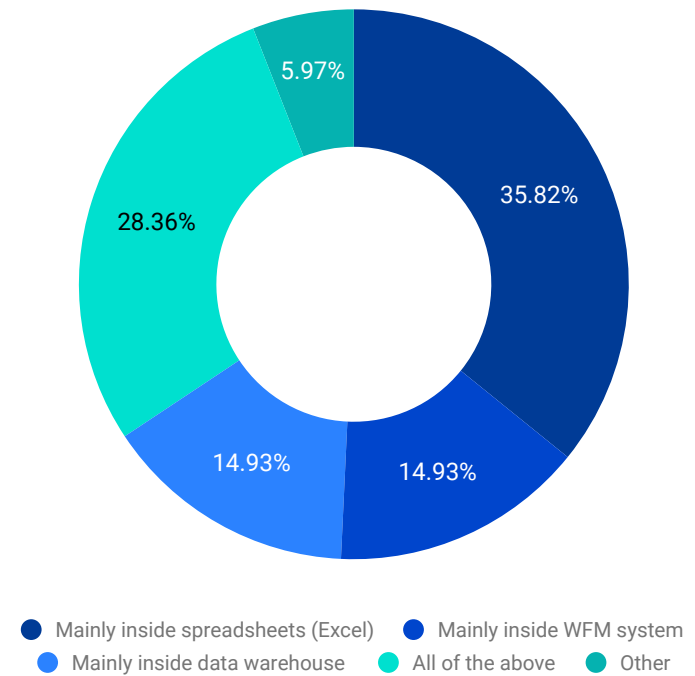
5.3 Over what interval do you evaluate your main KPIs?



KPIs can be tracked by hour, day, week and so on. The smaller the time frame, the more insights you will get. A service level that is tracked only once a day can for example conceal drastic service level drops in some intervals of the day.

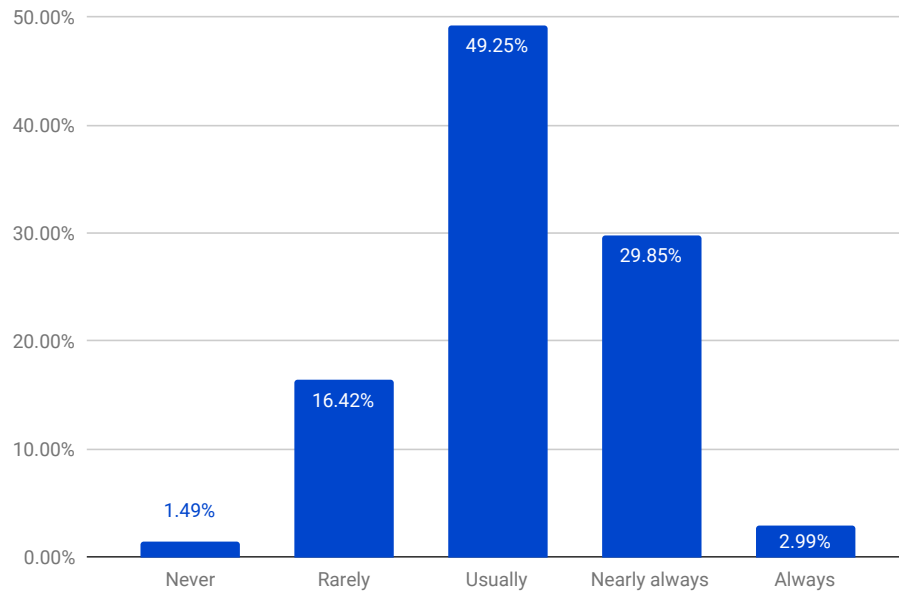
- The majority of contact centres monitors their main KPIs on a daily basis.

5.4 Where do you monitor your KPIs?



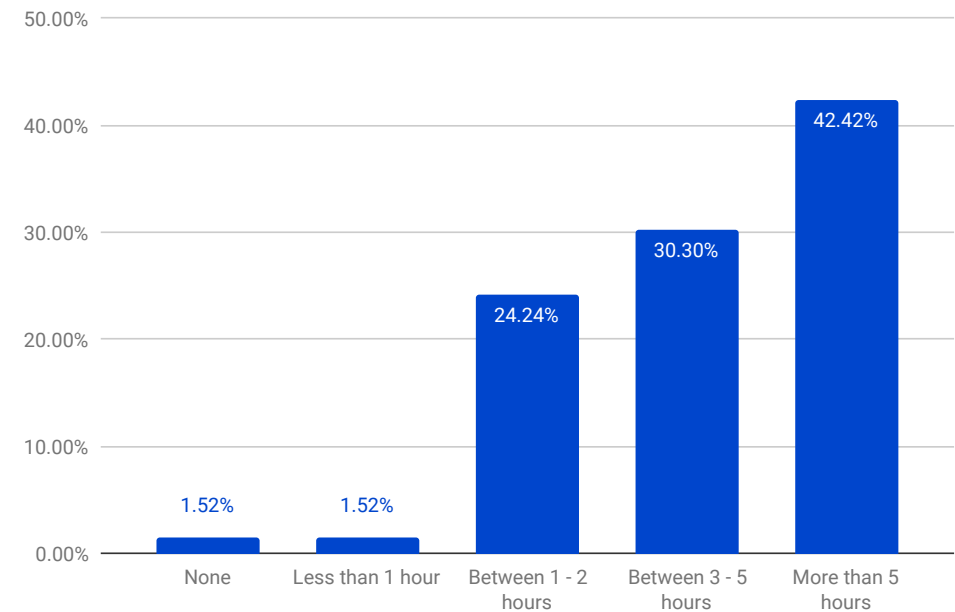
- Spreadsheet tools such as Excel are the most common way to monitor and report on KPIs.
- Only 15% stated that their KPIs are monitored mainly inside their WFM system.

5.5 How often do you typically achieve your KPI targets?



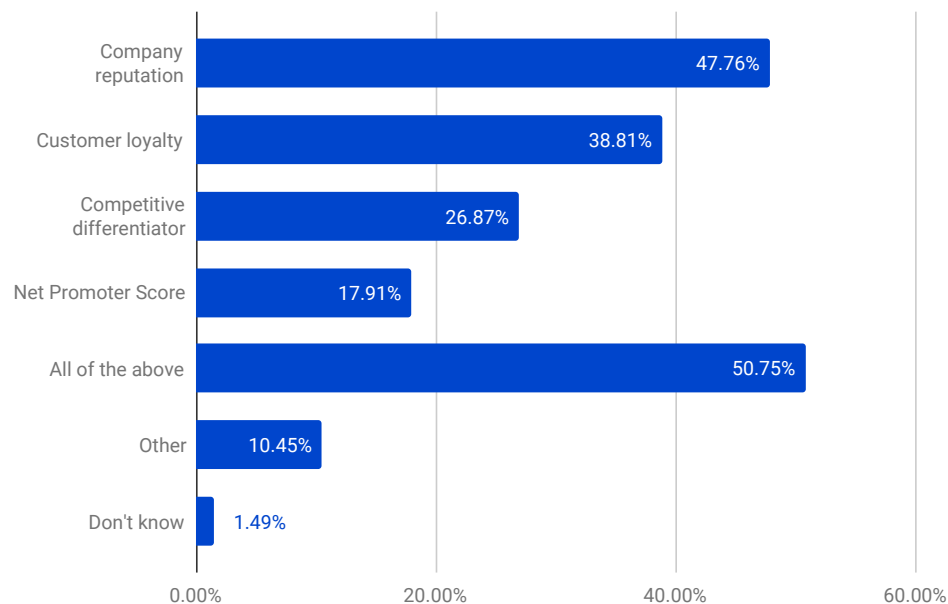
- ▶ The majority of contact centres achieves their KPI targets on a regular basis.
- ▶ Only 3% reported that they always achieve their targets.
- ▶ Yet, almost 20% of contact centres stated that they rarely meet their KPI targets.

5.6 In a typical week, how much time do you spend on reporting in hours?



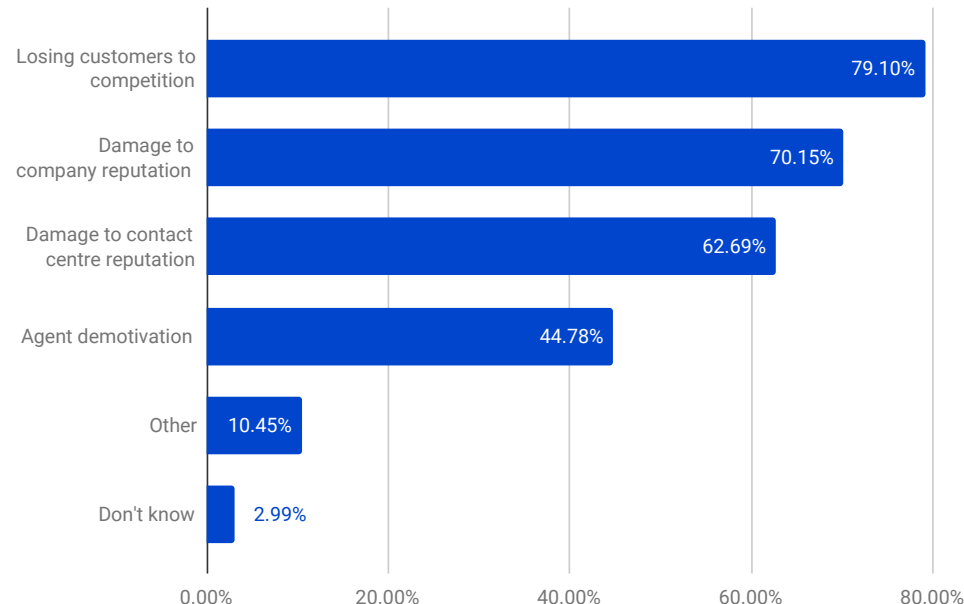
- ▶ 42% of contact centres spend more than 5 hours on reporting.

5.7 What is the value to your business of delivering on service level goals?



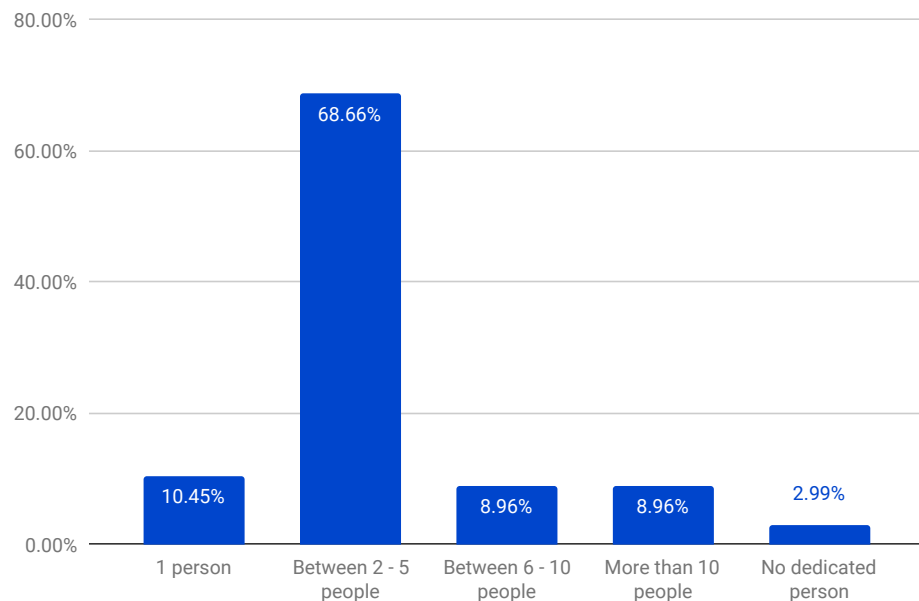
- The value of delivering on service level goals is diversified for most of the contact centres surveyed and covers benefits such as improving the overall company reputation while also positively affecting customer loyalty and the differentiation from competitors.

5.8 What is the cost to your business of failing to deliver on service level goals?



- Almost 80% of contact centres stated that the biggest business pain of failing to meet service level targets is customer churn.
- Only 45% reported agent demotivation as the greatest cost of failing to deliver on service level goals.

5.9 How many dedicated people in your contact centre look after reporting?



- Typically, 2-5 dedicated people are looking after reporting in the contact centres that participated in the survey. The majority of survey participants are medium-sized businesses with 100-499 agents.

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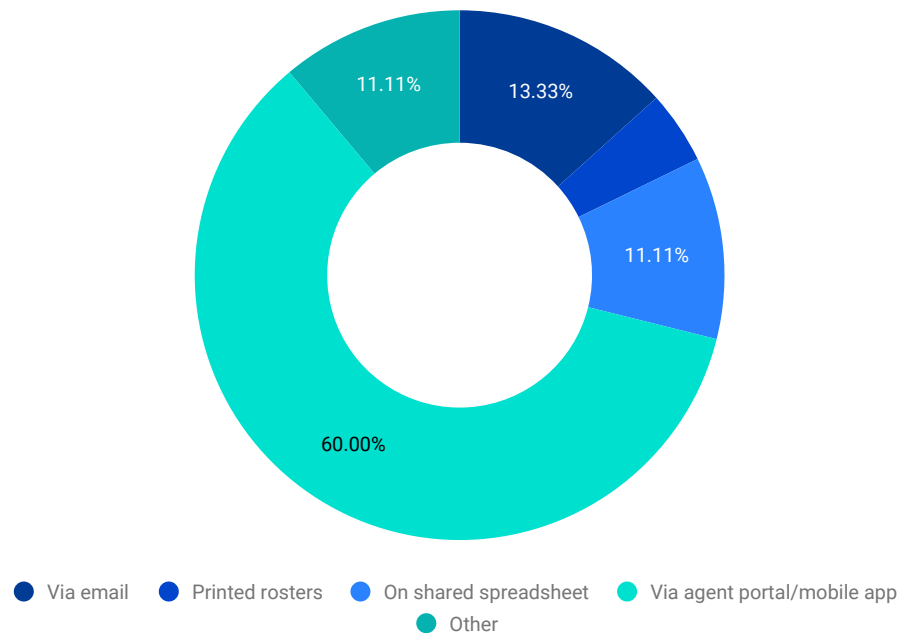
The Must-Have Guide to Accurate Call Centre Forecasting

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The background is a solid blue color with several abstract, semi-transparent geometric shapes in lighter shades of blue and teal. These shapes are scattered across the page, some containing small white squares or diamonds. The overall design is modern and clean.

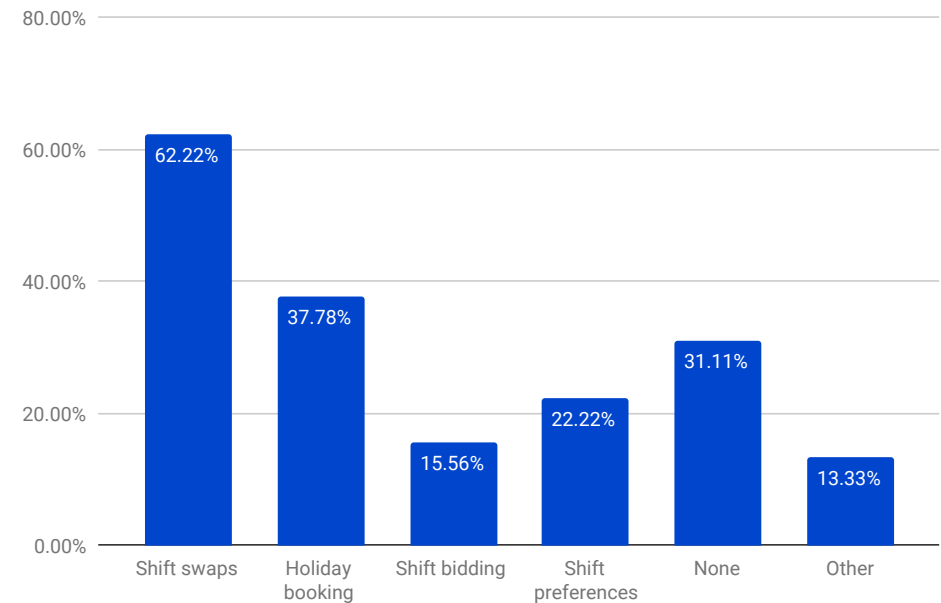
6 Employee Engagement Benchmarks

6.1 How do you mainly publish schedules to agents?



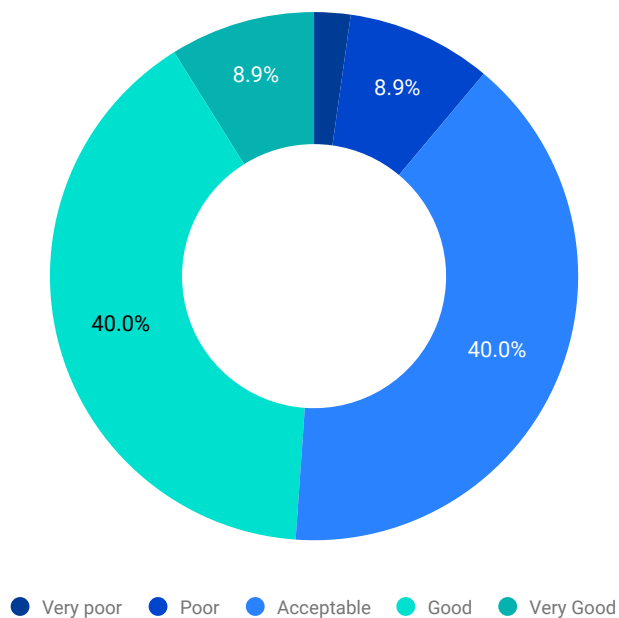
- ▶ The majority of contact centres uses an agent portal to make schedules available to agents.
- ▶ Yet, 18% still use printed rosters and email as their primary tool to publish schedules.

6.2 Which of the following options do you offer to agents on a self-service basis?



- ▶ More than 60% of contact centres offer shift swaps to agents on a self-service basis.
- ▶ Surprisingly, roughly one third of survey participants offers none of the self-service options listed.

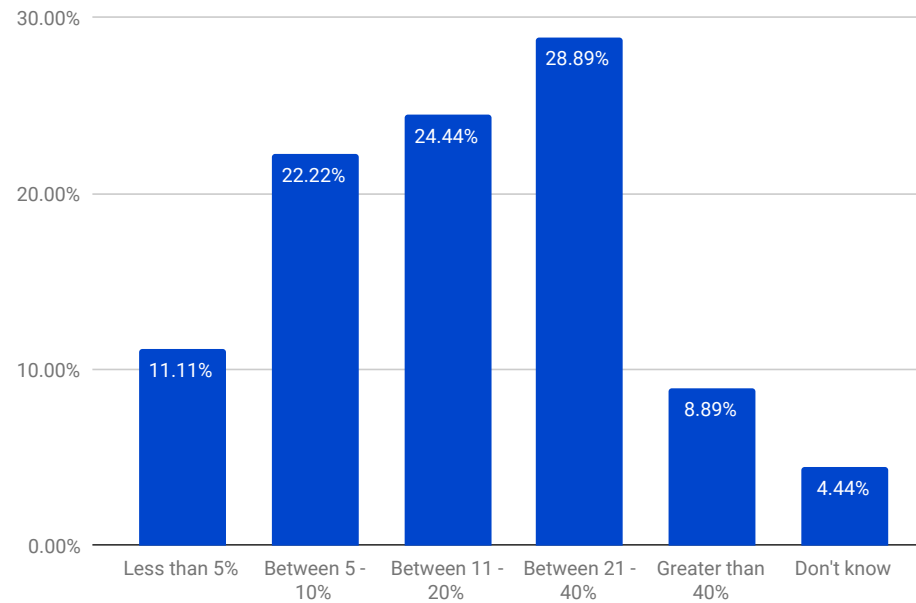
6.3 How would you rate the level of employee satisfaction in your contact centre?



- The employee satisfaction in almost 50% of contact centres is rated to be “good” or “very good”.
- Yet, around 9% indicate that employee satisfaction is “poor” or even “very poor”.



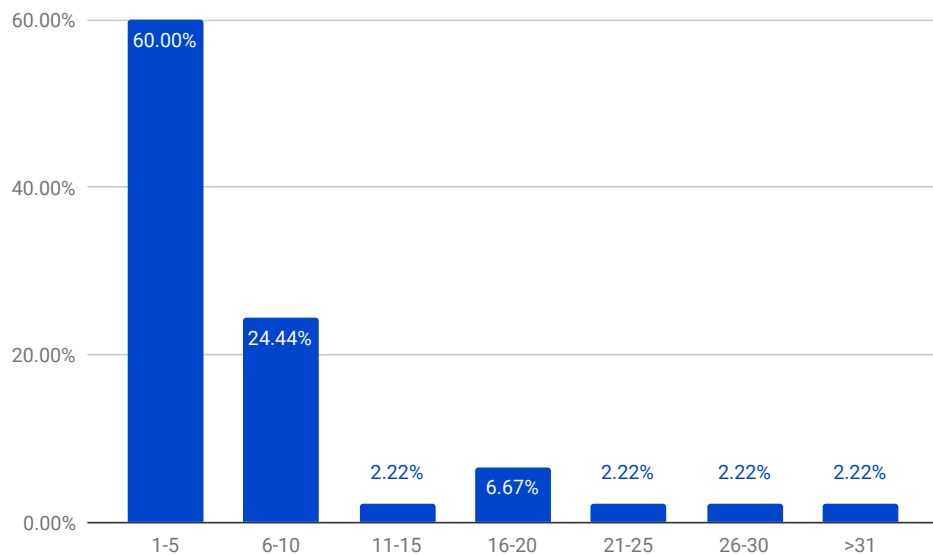
6.4 What is your current annual staff turnover in %?



Contact centres struggle a lot with high staff turnover rates.

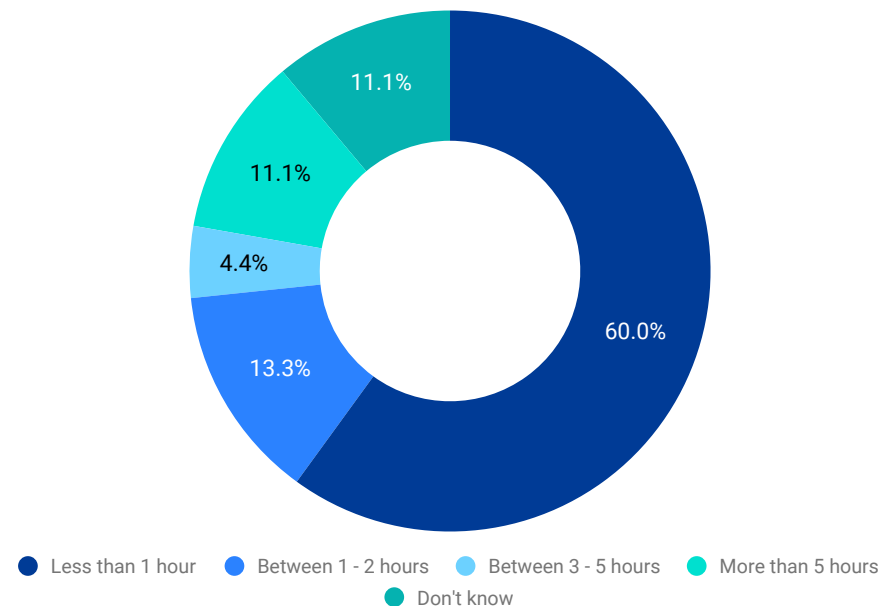
- ▶ Staff turnover for 38% of contact centres is greater than 21%.
- ▶ For 9% of contact centres, staff turnover is even greater than 40%.

6.5 In a typical week, how many hours do you spend on managing holiday requests and shift swaps?



- In a typical week, 60% of contact centres spent up to 5 hours on managing holiday requests.
- 13% of contact centres stated that they spend 16 hours or more which can already fill a part time job.

6.6 In a typical week, how many office hours does an agent spend on administrative tasks such as holiday requests, shift swaps, etc.?



- The majority of contact centres indicated that their employees spend less than an hour on administrative tasks.

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About injixo

The 2019 Contact Centre WFM Benchmark Study was conducted and brought to you by injixo.

injixo empowers contact centres to make a difference in workforce management everyday - by transforming planners into WFM heroes.

injixo WFM is an **award-winning** workforce management platform for contact centres of all sizes. The **feature-rich WFM suite** helps contact centres **optimize and automate** their entire workforce management process from start to finish. injixo covers the full bandwidth of functionalities contact centres need, from **forecasting** and **scheduling** to **intraday management**, reporting and **agent engagement**. injixo's simple **pay-per-use pricing** model enables small and large contact centres alike to experience the full power of professional WFM - with maximum flexibility and cost transparency, ultimate scalability and minimum effort.



injixo is a product brand of InVision Group, an internationally operating software company based in Germany and specialising in workforce management and contact centres since 1995. With its long standing experience, focus on continuous improvement, technical excellence and customer value delivery at its core, **InVision** is an established player and expert in Workforce Management technology.



Check us out and discover everything you need to be a WFM hero at www.injixo.com.



Become a Workforce Management Hero with injixo WFM

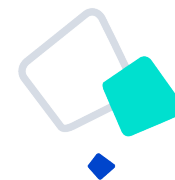
Are you ready to accelerate your performance in Workforce Management and crush the benchmarks next time - no matter if in Forecasting, Scheduling, Realtime Management, Reporting or Employee Engagement? Check us out and calculate your Return-on-Investment with our brand new [Online ROI Calculator](#) to see how much money you will save with injixo WFM.



The most common benefits and improvements that our customers reported when using injixo WFM:

- ▶ Up to 50% reduction in planning effort
- ▶ Up to 20% cost savings
- ▶ Up to 95% reduction in call abandonment

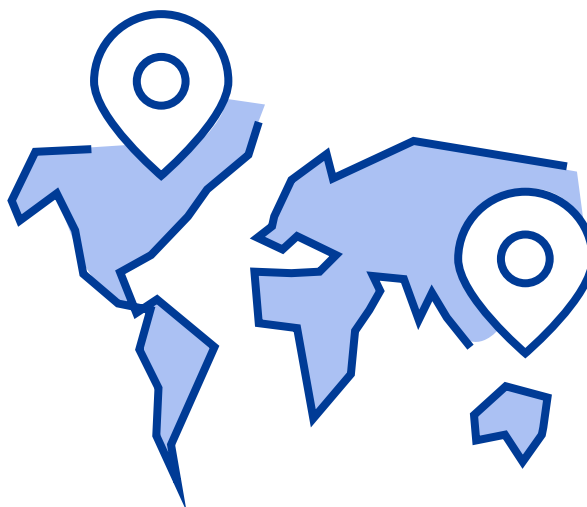
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Report Methodology & Demographics

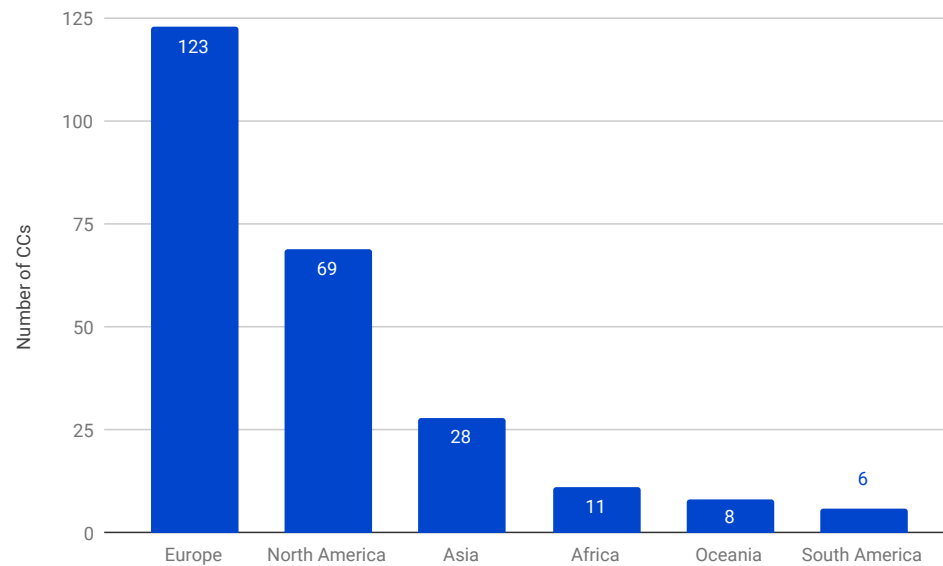
For this report, injixo surveyed Workforce Management professionals around the globe between August 2018 and February 2019 regarding the current state of Workforce Management in contact centres.

245 participants from 46 countries across more than 13 different industries and of all sizes took part in the survey. The majority of participants are from the UK (29%) and the US (22%).

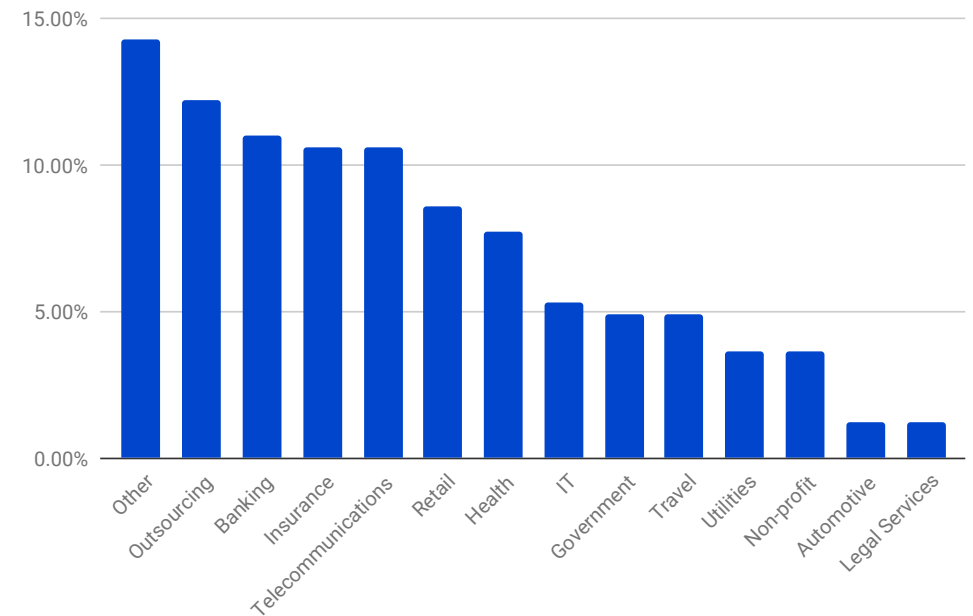


Detailed statistics about the report participants

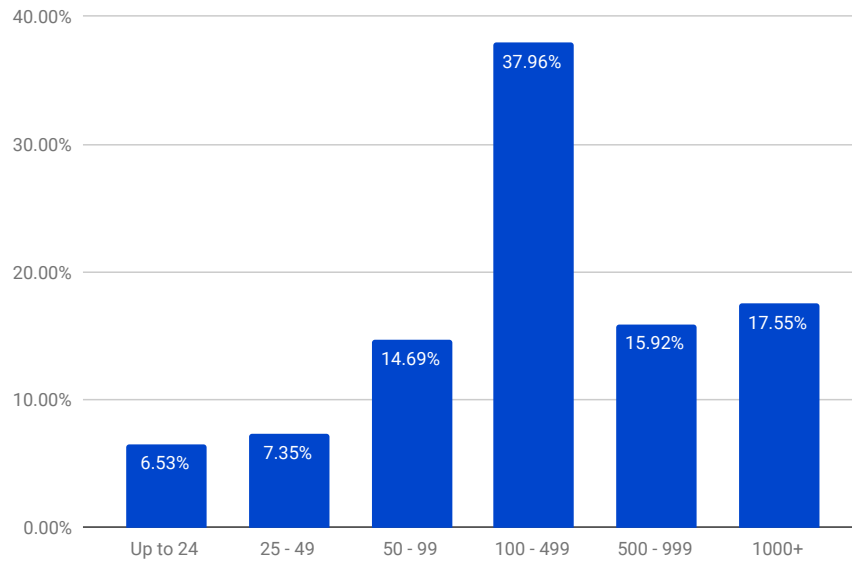
Regions



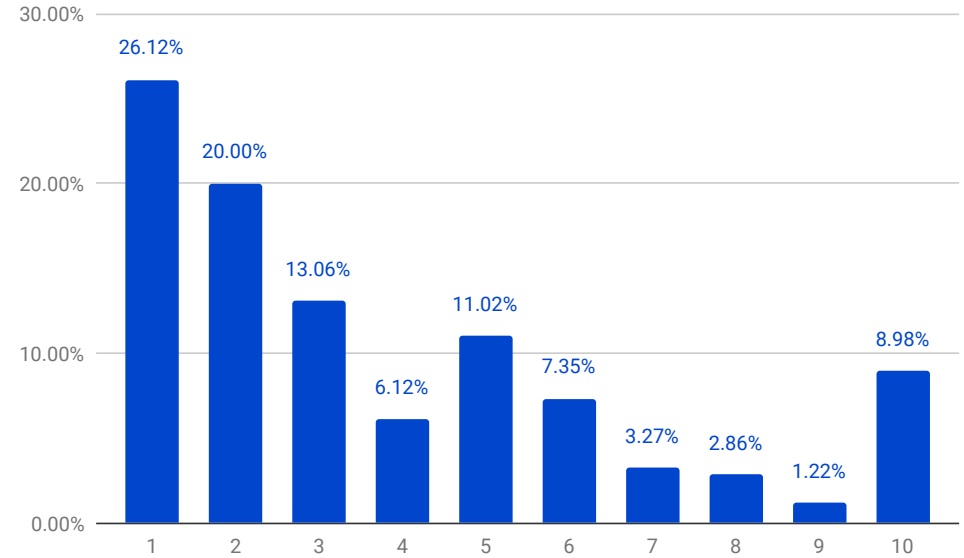
Industry



Number of agents



Number of contact centre sites



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