NICE

Leveraging Artificial Intelligence and Intelligent Automation in the Workforce Management Suite

Introduction

Workforce managers are constantly bombarded by new challenges and organizational demands: Near-constant changes to the forecast and schedule, increased needs from customers, and evolving employee hiring and retention requirements create an environment where it's difficult to respond quickly enough or understand the best possible action to take.

To meet these demands, contact centers around the world are rushing to adopt artificial intelligence (AI)-based workforce management (WFM) tools. The market for contact center AI is expected to grow to nearly $2 billion at a rate of 22.6% CAGR from 2019 to 2024, and it's easy to see why. These tools transform how contact centers forecast short- and long-term scheduling and hiring needs, connect with employees and put customers in touch with the right agent at the right time. They simplify how contact centers execute WFM processes on a day-to-day basis, freeing up valuable time for more difficult tasks.

And as contact centers have started to adopt intelligent WFM, the leader in the industry has driven innovation with AI and automation: the NICE WFM Suite. The solution is the leader in Gartner's Magic Quadrant for Workforce Engagement Management and has been implemented in thousands of contact centers around the world. Its suite of tools powered by embedded AI makes smarter decision-making easy and intuitive. NICE WFM's capacity to quickly transform how planning, hiring, forecasting, scheduling and intraday management are executed has made it the platform of choice among contact center leaders.
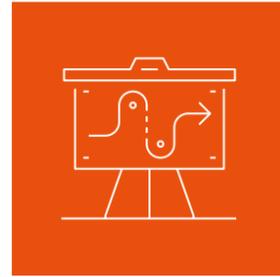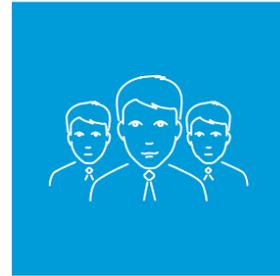
Plan for the Future More *Accurately*

GET MORE OUT OF WORKFORCE PLANNING

Contact centers recognize the critical importance of same-day decisions on long-term performance, but many fail to tap into the full ROI of long-term planning. NICE Enhanced Strategic Planner (ESP), a component of the NICE WFM Suite, helps contact centers prepare for the staffing challenges of tomorrow, today.

ESP intelligently predicts how anticipated or potential staffing scenarios will impact the contact center's ability to meet performance goals. The AI-driven solution considers a range of variables, such as staff and channel needs, as well as business parameters to make precise, customized predictions. In doing do, it empowers contact centers to control costs, develop better hiring plans and improve customer service while realizing forecasts that are 6% to 10% more accurate than traditional long-term forecasting methods.

ESP UNLEASHES THE POWER OF AI-BASED LONG-TERM PLANNING WITH:

Long-term Planning: ESP leverages "Best Pick" AI to analyze historical data and uses dozens of algorithms to make the most precise decisions about future demand.

What-if Planning: Managers can conduct two-way what-if analyses and reverse problem solve between staffing requirements and performance metrics. This empowers contact centers to understand the staffing requirements needed to meet KPIs while creating specific scenarios around demand, shrinkage and handle times.

Intuitive Design: ESP is easy to use and can be accessed on any device.

Enhanced Strategic Planner — ESP_User@nice.com — NICE

Manage plans>
Ashlie_Plan FY2020

Save as | Save

CONTACT TYPE
500 US Customer Service | Select rows

| PARAMETER	+ SEP 2020	+ OCT 2020	+ NOV 2020	+ DEC 2020	+ JAN 2021	+ FEB 2021	+ MAR 2021	+ APR 2021	+ MAY 2021	+ JUN 2021	+ JUL 2021	TOTAL	AVERAGE
Contacts Received	987,441	989,416	991,395	993,378	995,364	997,355	999,350	1,001,348	1,003,351	1,005,358	1,007,369	10,971,124	997,375
AHT	215	216	215	215	216	215	215	215	215	216	216		215
Service Level (%)	70	70	70	70	70	70	70	70	70	70	70		70
Service Level (time)	30	30	30	30	30	30	30	30	30	30	30		30
ASA	29.60	20	20	20	20	20	20	20	20	20	20		20.70
Maximum Occupancy (%)	92.40	90	90	90	90	90	90	90	90	90	90		90.18
Base FTE	937.97	954.55	901.41	935.94	950.78	956.20	935.87	918.92	916.19	920.88	932	932.47	932.62
Multi-skill Efficiency	0.9500	0.9500	0.9500	0.9500	0.9500	0.9500	0.9500	0.9500	0.9500	0.9500	0.9500		0.9643
Shrinkage (%)	22	22	22	22	22	22	22	22	22	22	22		22.00
Absent	3.52	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67		3.66
Meeting	3.83	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67		3.68
Special Projects	3.53	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67		3.66
Tardy	3.53	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67	3.67		3.66

Hire Only
the Best
People

TURN THE SUBJECTIVE HIRING PROCESS INTO AN OBJECTIVE ONE WITH AI-ENABLED VOICE ANALYSIS

While many organizations place an emphasis on forecasting and planning, it's just as important to ensure that contact centers can successfully fulfill the headcount plan they have forecasted and ensure they have the right people in the pipeline.

NICE Employee Selection and Retention (ESR), a component of the NICE WFM Suite, bridges the gap between the profile of a great contact center employee and what operations and workforce managers feel that HR is able to assess with traditional recruiting methods. Using AI-enabled voice analysis, ESR

helps contact centers identify the new hires that will be high-value employees not only during the first 90 days of employment, when organizations make a significant investment in training and onboarding, but also well into the future.

ESR helps streamline and automate the elements of the interview process and provides an objective assessment and prediction of employee aptitude, engagement and performance using voice analysis and other assessment tools.
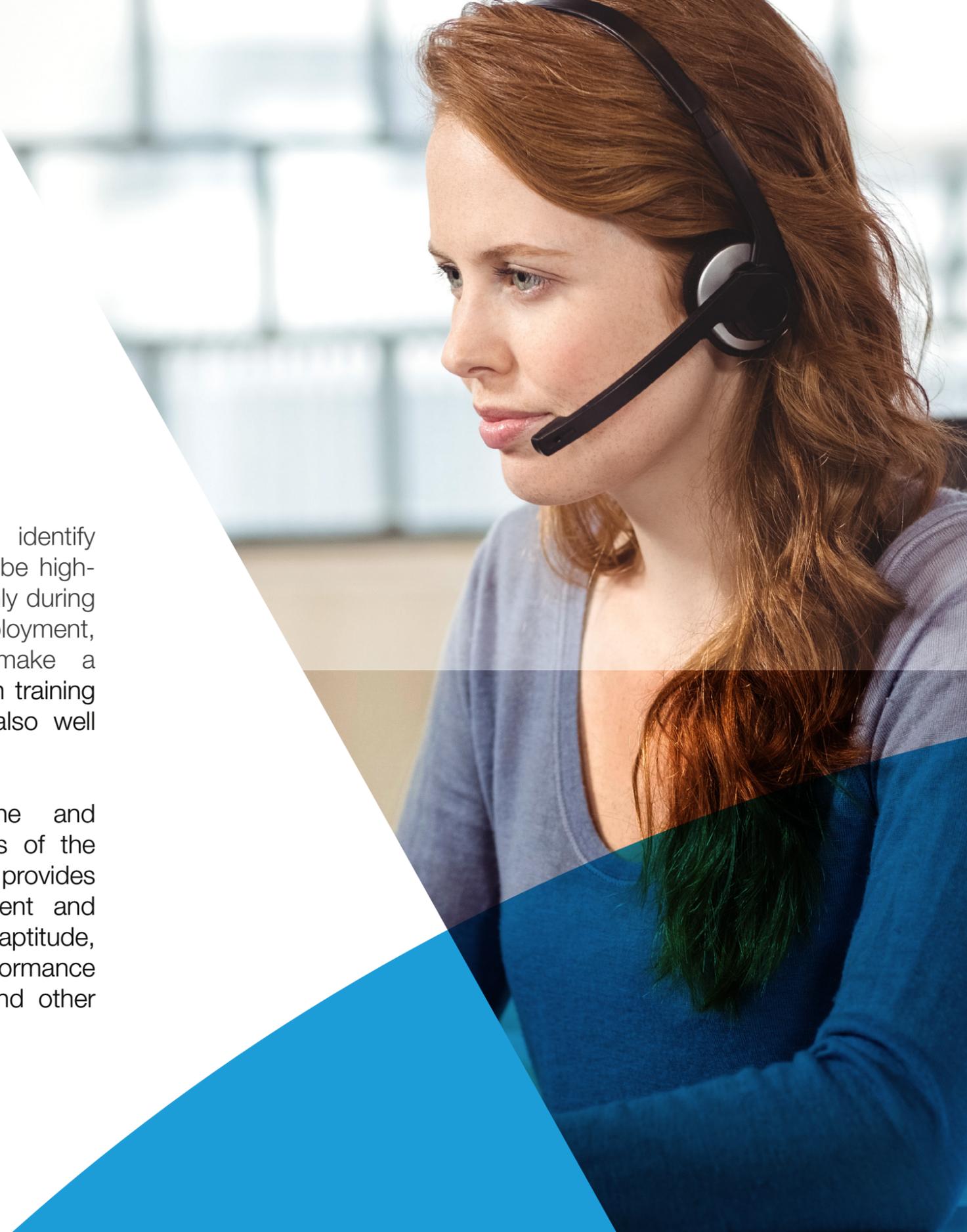
HIRING RECIPE

24x7 Virtual Interview

Language Testing

Quizzes & Tests

ML-POWERED PREDICTIVE ANALYTICS

X_M ... X_3 X_2 X_1

A_O ... A_2 A_1

B_G ... B_2 B_1

C_P ... C_2 C_1

Y

Input

Hidden Layer 1

Hidden Layer 2

Hidden Layer 3

Output
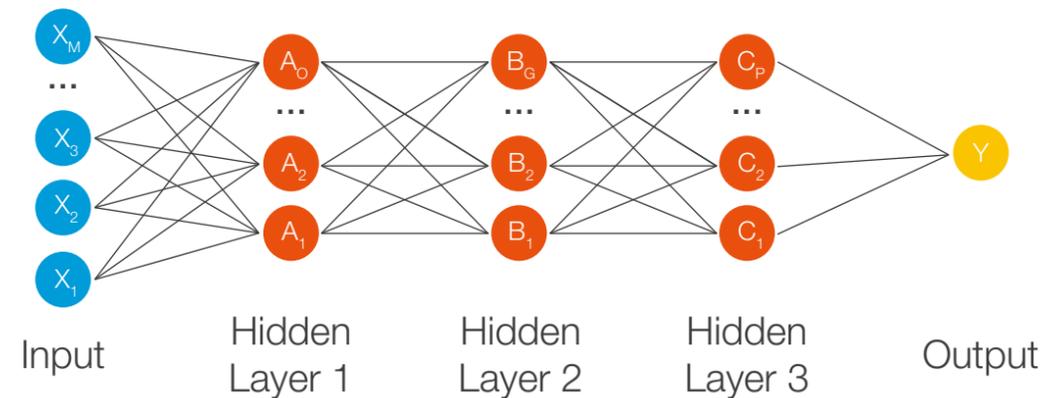
RECOMMENDATIONS

Hire Right Away

Proceed with Caution

Do Not Hire

ESR IDENTIFIES HIGH-VALUE CANDIDATES WHO WILL BE TOP PERFORMERS BY ANALYZING:

Metrics
- Language proficiency, including comprehension, critical thinking and active listening
- Data entry accuracy
- Simultaneous chat, including multi-tasking capacity and accuracy of contextual responses
- Job, company and Industry-specific knowledge

Attributes
- Emotional affect, which encompasses energy and emotion
- Communication skills

Preferences
- Schedule availability and preference, including days, times and holidays
- Work environment, including preferred team size and team leadership styles
- Motivators (e.g., games, goals, recognition and rewards)

Forecast
More Efficiently and Effectively

MANAGE YOUR WORKFORCE MORE EFFECTIVELY AND ELIMINATE OVER-STAFFING

Forecasting demand for contact centers is both an art and a science. It requires accuracy as well as deep knowledge of the contact center environment. Methods for forecasting are numerous, and they can be overwhelming for contact center managers whose expertise lies elsewhere. In today's fast-paced and competitive playing field, quickly identifying the best forecasting method is critical.

NICE WFM's forecasting solution leverages AI tools to find unseen patterns in the historical data used to generate forecasts of volume and work time. It automatically evaluates dozens of different algorithms and leverages historical data patterns, seasonality and cyclicality to make forecasting more accurate.

AI-BASED FORECASTING ENABLES CONTACT CENTERS TO:

- **Automatically evaluate** dozens of forecasting algorithms and determine the model with the best accuracy.
- **Increase the accuracy** of the staffing plan.
- **Increase the operational efficiency** of the staffing plan.
- **Adapt to changing data patterns.**

Enable Real-World Simulation for Scheduling

INCREASE CUSTOMER SATISFACTION WITH HIGHLY ACCURATE STAFFING SIMULATIONS

Responding to and accurately answering a customer's questions in a timely manner is a key to any contact center's success. But ensuring that the right agents are on hand at any given time to respond to a specific customer service question or situation, with the right knowledge, background and skills – and across multiple channels – poses a not-insignificant challenge for scheduling. Traditional mathematical formulas, which use historical data to optimize schedule creation, are no longer effective, as they don't account for variables such as changes in agent skill sets or an unexpected spike in customer requests.

NICE WFM uses machine learning to simulate real-world prioritization, routing and skill assignments to determine work allocation expectations, deferrable work propagation and multi-site/multi-skill efficiencies. Robust new algorithms support the forecast parameters of NICE WFM and simulation of exact routing rules to generate extremely accurate staffing requirements.

NICE WFM'S MACHINE LEARNING-BASED SIMULATION PROVIDES MORE ACCURATE SCHEDULING THROUGH:

- **Strategic planning** that uses forecasting algorithms to adequately create the right schedule based on available agents' skill sets.

- **Agent skills-based routing** that schedules agents appropriately, diversifying the number of agents with particular skills across all areas at any given time.

- **Automatic adjustments** to variables, pinpointing interrelated changes and adjusting schedules for a more efficient process.

IN ADDITION TO THE UNIQUE SIMULATION ABILITIES, NICE WFM SUPPORTS THE MOST SCHEDULING PARADIGMS AVAILABLE IN THE MARKET, INCLUDING:

- Automatic Employee Assignment, using Preferences
- Automatic Pattern Assignment, using Preferences
- Schedule Pattern Bidding
- Team Scheduling
- Weekly / Multi-week Hours, Date Range Scheduling
- Shift Policies (Sequences & Limits)
- Schedule Overhead
- Seat Limits
- Weekend Fairness
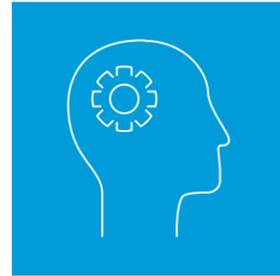- Day of Week Fairness
- Holiday Fairness
- Multiple Schedule Optimization Controls

While it's important to achieve business goals in staffing, contact centers also need to provide as much flexibility as possible to the people being scheduled. NICE WFM considers the people at every stage of the scheduling process. When schedules are being generated, the solution uses skills, time off and availability as constraints, ensuring that employee availability is honored. Then, during the schedule assignment phase, the solution considers preferences and grants them when possible according to rank, seniority or other priorities from the business. Once the schedule is published, NICE WFM offers many ways for the employee to make changes through swaps or trades within the solution or with the intelligent automation provided by Employee Engagement Manager (EEM), enabling employees to manage their work-life balance.

Managing
the Intraday
Process

The WFM team's work isn't done once the schedule is published. NICE WFM provides the tools needed to easily reforecast and re-simulate demand throughout the day and revise requirements as needed.

Many contact centers find that reforecasting and re-simulating two or three times a day helps them meet workload demand without overstaffing.

Life happens, and there are times when agents need to make changes to their schedules – or the business needs to revise the schedules. NICE supports these changes with skill-aware change management.

The real-time team needs a way to monitor what is happening in both the remote and the brick-and-mortar contact center. Comprehensive real-time schedule and activity adherence is part of the solution. Intraday analytics provide net staffing calculations by queue, automatic intraday reforecasting with conservative but aggressive algorithms that help contact centers:

- **Determine** plan effectiveness.
- **Analyze** and react to changes.
- **Reduce** time spent manually adjusting schedules.
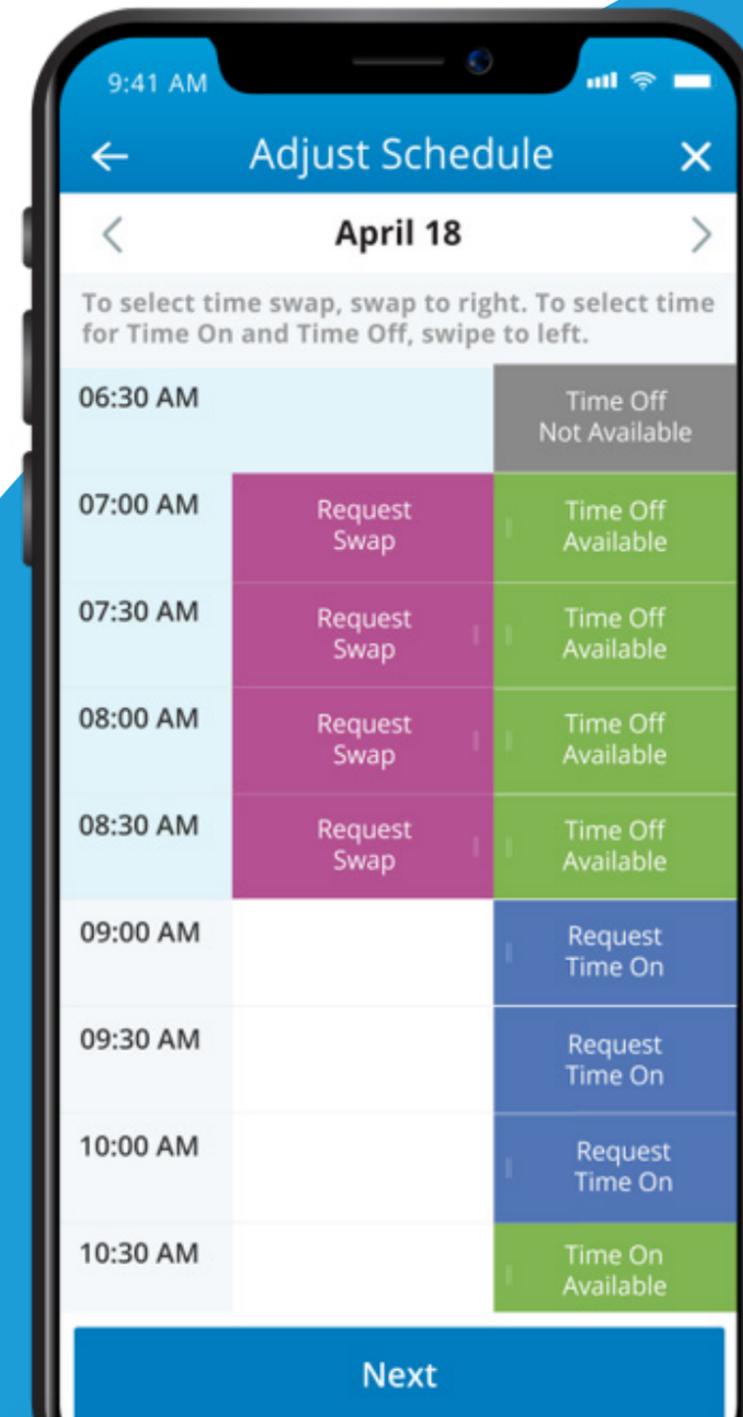- **Ensure** adherence to plan.

Use Intelligent Automation
to Improve Net Staffing, Intraday and Near-Term

OPTIMIZE STAFFING THROUGH AUTOMATED SELF-SERVICE FOR EMPLOYEES AND PROACTIVE SCHEDULE ADJUSTMENTS

Mismatches in staffing and demand are a key cost driver for most contact centers, which often find themselves with too few or too many employees on the clock. NICE Employee Engagement Manager (EEM), a component of the NICE WFM Suite, automatically optimizes staffing after WFM schedules are published, both intraday and up to several weeks into the future. By identifying staffing variances in advance, EEM reduces or eliminates friction, intraday and near-term, before it can materialize.

EEM proactively communicates schedule change opportunities that are tailored to each agent's skills and preferences, empowering contact center leaders to efficiently resolve over- and under-staffing challenges while catering to each agent's preferred work-life balance.

Smartphone mockup showing the "Adjust Schedule" screen for April 18:

To select time swap, swap to right. To select time for Time On and Time Off, swipe to left.

Time		
06:30 AM		Time Off Not Available
07:00 AM	Request Swap	Time Off Available
07:30 AM	Request Swap	Time Off Available
08:00 AM	Request Swap	Time Off Available
08:30 AM	Request Swap	Time Off Available
09:00 AM		Request Time On
09:30 AM		Request Time On
10:00 AM		Request Time On
10:30 AM		Time On Available

Next

EEM IMPROVES NET STAFFING THROUGH PROACTIVE, RULES-BASED SCHEDULE ADJUSTMENTS AND EMPLOYEE SELF-SERVICE THAT:

- **Automatically identifies** potential staffing variances, gaps and overages by analyzing staffing over the preferred time range, whether day-to-day, monthly or annually.

- **Empowers agents** with multiple means of automated self-service scheduling, including mobile and browser-based user interfaces, to view and instantly modify their schedules 24/7 with automatic pre-approval of schedule changes that are offered to agents only when they benefit net staffing.
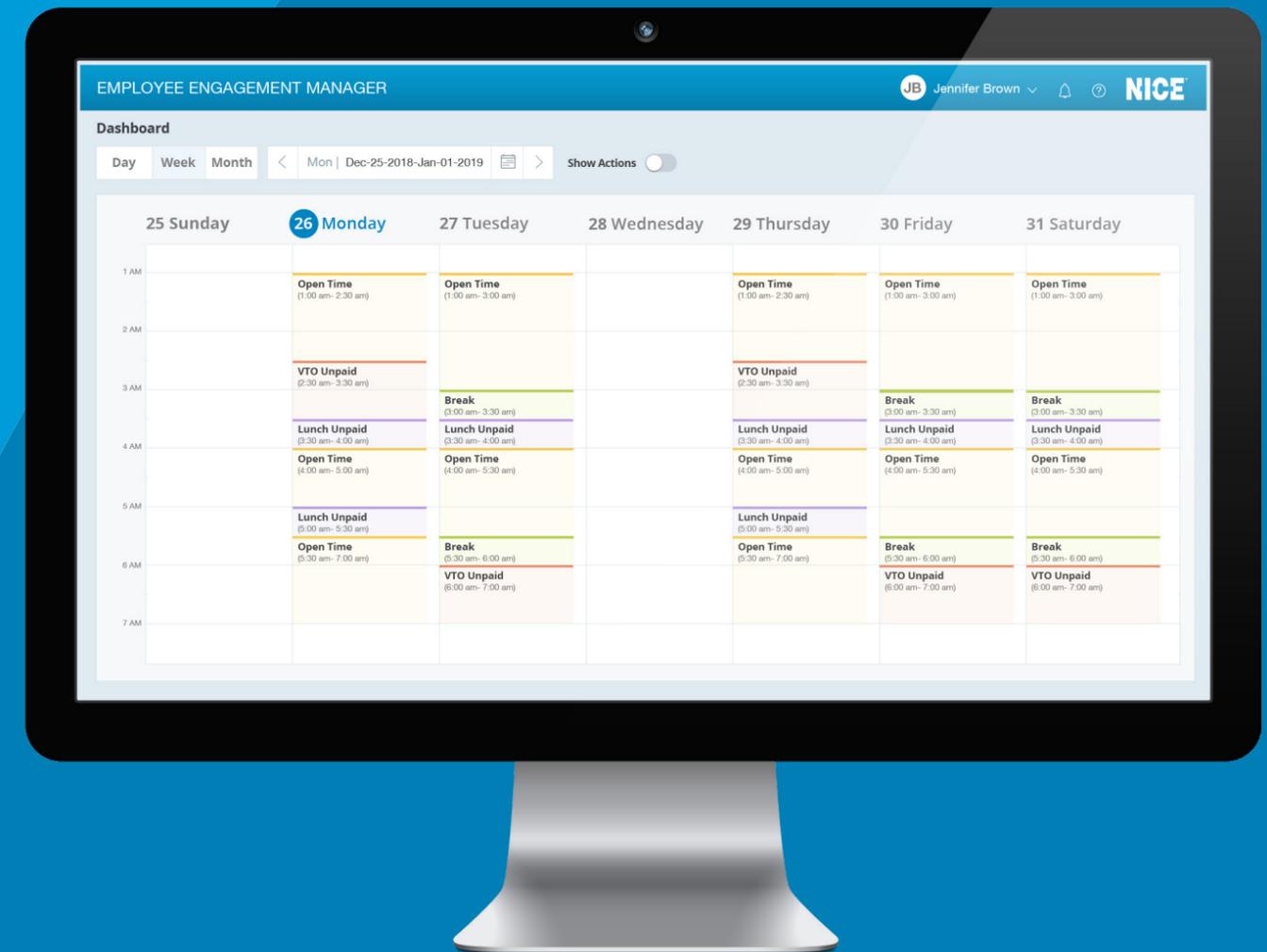
Contact center leaders have an unrealized opportunity in intraday automation to streamline workflows and reduce complexity, increase efficiency and simplify multi-step decision-making. Manual processes currently in use in many contact centers are rife with inefficiency, and supervisors and agents become frustrated by the back-and-forth needed to make the intraday schedule adjustments required to meet customer demand. EEM eliminates this source of frustration; the only solution available to empower employees to make pre-approved schedule changes on the go, it enables agents to improve their work-life balance, increasing engagement, while proactively improving net staffing.

Expect Benefits of the Cloud

MAINTAIN CONTROL OF YOUR SOLUTION

The cloud has become a key enabler of workforce management, with contact centers reaping the benefits of the many advantages of the cloud: easier and more cost-effective disaster recovery, scalability, ease of management and maintenance, and cost savings without giving up control over strict IT security policies and governance.

With NICE WFM in the Cloud, contact centers can leave the infrastructure, management and maintenance of their workforce management solution to us. There's no need for a lengthy software or hardware deployment, which means a faster ROI and a better customer experience. Cloud-based WFM also significantly reduces the hardware, software, connectivity and facilities costs associated with large enterprise deployments in addition to the labor expenses associated with supporting infrastructure and applications for an on-premise solution.

THE BENEFITS OF USING WFM AS A CLOUD SOLUTION INCLUDE:

- **Predictable financial costs**, with a monthly pay-per-use model that supports environments with a variable number of agents.

- **High availability.**

- **Always-current WFM**, with upgrades to the latest supported version and maintenance patches included. A pre-production staging environment ensures that integrations continue to work with new versions.

- **Optional lab** for the IT professional to continue to test underlying platform and system integrations in a safe environment.

- **A guaranteed service level** of 99.9% with proactive monitoring.

- **Optional disaster recovery**, for guaranteed continuity of service for any event.

Unlock Immediate and Long-Term Value

OVERCOME ADOPTION CHALLENGES THROUGH CHANGE MANAGEMENT, INTEGRATION AND MANAGED SERVICES

Putting the power of artificial intelligence and automation to work in the contact center requires considering more than just technology. Contact centers are asking employees to change how they complete their work and are creating an entirely new technology environment for them to work in. It often isn't readily clear where transformation is needed to support new systems or how to get the most value out of new AI solutions.

That's why NICE Value Realization Services (VRS) works with WFM Suite customers, from Day One until long after go live, to enable continuous improvement and eliminate friction between people and technology. VRS is NICE's tactical transformation team, pairing your organization with experts in NICE technology to solve the toughest adoption challenges.

VRS SERVES AS A FORCE MULTIPLIER FOR WFM VALUE THROUGH:

- **Business services** that include consulting on change management, ROI capture and analytics, application configuration, governance and best-practice training.

- **Managed services** that embed subject matter experts in Agile planning and delivery, proactive risk identification, 24/7 monitoring, risk mitigation, service analysis and trends reporting in your organization.

- **Advanced services** that design and build custom solutions for cross-platform integration, business intelligence, health checks and more.

Plan, Schedule, Manage and Automate
Workforce Management
with the NICE WFM Suite

More than two thousand customers and 2.7 million users rely on the NICE WFM Suite to deliver on the promise of AI. The most advanced and accurate workforce management tool available, it uncovers hidden patterns, makes accurate forecasts and identifies not only the best forecasting model but also the best candidates during the hiring process. By combining the latest technologies with the most agent-friendly solution, all in an easy-to-use cloud platform, it allows contact centers to effectively respond to ever-changing conditions while engaging agents and empowering teams like never before.

NICE