Course Description

Configuring, Forecasting, and Scheduling with Workforce Manager focuses on the concepts and skills needed to use Genesys Workforce Manager (WFM) to forecast workload and workforce, schedule agents, and monitor adherence to forecasts and schedules. This is a hands-on class where students configure a variety of contact center examples to gain knowledge of Workforce Manager’s capabilities. The course includes the following topics: contact center rules, contracts, shift definitions, forecasting, scheduling, monitoring adherence and performance, and using the web interface as a supervisor or agent.

Target Audience

Configuring, Forecasting, and Scheduling with Workforce Manager is intended for contact center managers, supervisors, and others responsible for scheduling and monitoring contact center efficiency.

Delivery Methods

<table>
<thead>
<tr>
<th>Method</th>
<th>Duration</th>
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<tbody>
<tr>
<td>Instructor Led, In Classroom</td>
<td>5 days</td>
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<tr>
<td>Instructor Led, Online</td>
<td>34 hours</td>
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Prerequisites:

- Working knowledge of Microsoft Windows, including the ability to open and close windows and mouse proficiency
- Experience supervising or managing in a contact center

Software Version

This course uses Genesys version 8.

Course Objectives

After completing this course, a student will be able to:

- Summarize the benefits and components in Genesys Workforce Manager (WFM)
- Configure a contact center in Workforce Manager (seats, activities, skills, and security rights)
- Configure contact center rules and policies (contracts, meals, breaks, shifts, trading, exceptions and time off)
- Forecast workload and the workforce necessary to cover it
- Build and modify work schedules for agents
- Configure and use WFM Web Agent to manage agent time off, agent trading, agent initiated exceptions and agent bidding
- Manage a workforce (assign agents to teams, plan exceptions, grant agent preferences, and schedule meetings)
- Monitor adherence to forecasts, schedules, and agent compliance to scheduled activities
- Run reports needed for contact center management
- Combine physical contact centers into a business unit

Locate your local training center:  http://www.genesyslab.com/training/genesys_university_worldwide
Course Topics

Workforce Overview
- Workforce Management Overview
  - Workforce Management cycle
  - Genesys Workforce Management (WFM) components
  - Features and benefits
- WFM Configuration Utility and Options
  - Navigation
  - Configuration module rules
- WFM Policy Options
  - Hours of operations
  - Contracts and Shifts
  - Shift sequences
  - Assignment of contracts
- Forecasting and Scheduling
  - Create and publish forecast
  - Create and publish schedule
  - View Schedule in WFM Web Agent

Configuration Advanced Topics

- WFM Configuration Options
  - WFM Synchronization
  - Multiple activities
  - Organization
    - Teams
    - Business Unit
    - Schedule State Groups
- Advanced Policies
  - Contracts
  - Shifts
  - Rotating pattern

WFM Web supervisor
- Policies
  - Meeting Planner
  - Exceptions
  - Marked time

Forecasting Advanced Topics

- Create, modify and publish a forecast scenario
- Build a staffing scenario (calculated vs required)
- Demonstrate the difference in staffing scenarios as the service levels objectives
- Overlays and events
- Templates
- Staffing Shrinkage calculations

Pre-Schedule Activities
- WFM Web Agent preferences
- Add, review, filter and delete calendar items
- Grant or Decline calendar items
- Calendar wait list

Scheduling Advanced Topics
- Create, modify and publish a schedule
- Validate schedules based on calculated and required values
- Create a preference based schedule
- Insert and edit shift items
- Create profile schedule
- Sorting and schedule view options
- Coverage and head count level
- Swap agent schedules
- Preference based schedule
- Multiple wizard
- Master schedule management
- Meeting Scheduler

Measuring Success
- Performance
  - Display views
  - Alerts
  - “What if” calculations
  - Performance Reports
- Adherence
  - Define and apply adherence to scenario
  - Detail and Graphical views
  - Filter
  - Adherence Reports

Time Off Management
- Time Off Configuration
- Types, rules and limits
- Request and approval process
- Time Off Reports

Post Schedule Activities
- Manage the Agent Trading
  - Agent Trade proposals
  - Supervisor approval
- Create a agent bidding scenario
- Manage Agent Initiated Exceptions

Multisite forecasting and Scheduling
- Creating a multi-site activity
- Split a Forecast between sites
- Schedule agents across site.

WFM Review
- Case Studies
- Configuration Review
- Forecasting Review
- Scheduling Review

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