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## QUESTIONS YOU NEED TO ANSWER

WHEN CONSIDERING A NEW OR REPLACEMENT WORKFORCE MANAGEMENT SYSTEM

If you are considering a new workforce management system or upgrading your homegrown or legacy application, there are a number of critical decisions you should be thinking about. This infographic covers several of those key decisions.

Click the numbers below to view each important question

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### 1

#### WHAT ARE YOUR WFM GOALS?

By understanding what your top 3 goals are, you can determine the key functionality you need with in your implementation.

Reminder: a branch WFM project can have additional transformative benefits other than just cost savings. Be sure to explore those opportunities during planning.

##### SOME GOAL TYPES TO CONSIDER:

###### EFFICIENCY & PRODUCTIVITY

Are there savings from optimizing forecasting, scheduling, and non-customer branch activity?

- ✓ LABOR SAVINGS
- ✓ STAFFING MIX OPTIMIZATION
- ✓ MORE PRODUCTIVITY

###### CUSTOMER EXPERIENCE

Are there ways to leverage WFM to; free up more time for customer engagement, extend service hours efficiently, or more closely match skills to customer needs in order to improve service scores?

- ✓ SHORTER WAIT TIMES
- ✓ RIGHT SKILLS FOR ROLE
- ✓ CONVENIENT HOURS OF OPERATION

###### EMPLOYEE BENEFITS

Are you looking to engage employees more? Provide more hours to part-time employees? Or give frustrated employees tools to control their work-life balance?

- ✓ RIGHT SIZE EMPLOYEE WORKLOAD
- ✓ MORE SHIFT FLEXIBILITY
- ✓ MORE CONTROL OVER WHEN & HOW THEY ARE SCHEDULED

40% of employees quit, considered quitting, or called in sick over scheduling issues

###### SCHEDULING BURDEN

Are your branch managers spending way too much time on employee scheduling or scheduling exceptions? Are managers and regional directors able to leverage mobile for quick approvals or to view employee preferences?

- ✓ CENTRALIZE FIRST PASS SCHEDULES & ASSIGNMENTS
- ✓ AI-POWERED ABOVE-BRANCH OPTIMIZED SCHEDULES
- ✓ EASY-TO-USE MOBILE INTERFACE

48% of managers spend 8+ HOURS/WEEK scheduling

###### TRANSPARENCY & ACCOUNTABILITY

Are you looking for more transparency into scheduling at every management level?

- ✓ GIVE BRANCH MANAGERS REAL-TIME SCHEDULE VISIBILITY
- ✓ GIVE REGIONAL MANAGERS INSIGHTS INTO PERFORMANCE
- ✓ GIVE RETAIL HEADS FULL VIEW OF NETWORK PERFORMANCE

#### WHO AND HOW WILL THE SYSTEM BE RUN ONCE IMPLEMENTED?

##### DO YOU HAVE:

- ✓ Employees with the skill and aptitude to use the system capabilities?  
Many of the modern tools with AI may have a simple, UI built for more complex strategies, employees with more knowledge of WFM strategy and forecasting techniques could improve results and leverage more capabilities.
- ✓ A plan for ongoing maintenance and changes?  
Will your team make them or are you looking for a partner or the vendor to make all the changes?
- ✓ A plan for ongoing field training and support?

### 3

#### WHAT DATA DO YOU HAVE TO HELP SET UP INITIAL FORECASTS AND SCHEDULES?

##### CONSIDER:

- ✓ Do you need a project to expose or cleanse the data?
- ✓ Are you planning to run time studies for labor standards prior to the project and baked in the time and cost?
- ✓ Does your vendor have industry standards they can apply if needed?

#### HOW QUICKLY DO YOU NEED YOUR SYSTEM IMPLEMENTED?

Depending on your timeline, the implementation speed can limit a number of additional capabilities and benefits you may want to take advantage of.

##### FACTORS EFFECTING TIMELINE:

Integrating to teller lobby management system for real-time assignments

May be a level of complexity unnecessary for an initial launch of simple forecasting and scheduling.

New processes or organizational changes like centralized scheduling

Can be a project all on its own or combined with a new system.

Learn more about Centralized Scheduling

### 5

#### REPORTING OR ACTIONABLE INSIGHTS?

Learn more about Advanced Analytics

##### CONSIDER:

- ✓ What key reports or metrics do you need to run the business?
- ✓ What reports will each stakeholder need and can users easily create reports without the vendor?
- ✓ What insights can you have generated in the reporting vs just the data and can you take action from the system?

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#### WHAT'S NEXT?

While these are not the only questions you might think about when implementing a WFM system, these should help you think about a number of the most impactful decisions you might be asked to make when implementing a new WFM system.

LEARN MORE ABOUT AI-POWERED WFM SOLUTIONS

For more information on implementing a WFM system or an estimate of financial value that could be gained, sign up now for a free custom market assessment from Reflexis

GET YOUR CUSTOM ASSESSMENT