QUESTIONS YOU NEED TO ANSWER

WHAT ARE YOUR WFM GOALS?

WHEN CONSIDERING A NEW OR REPLACEMENT WORKFORCE MANAGEMENT SYSTEM

Click the numbers below to view each important question

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.

By understanding what your top 3 goals are, you can determine the key functionality you lead 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:

LABOR SAVINGS

STAFFING MIX OPTIMIZATION

MORE PRODUCTIVITY

SHORTER WAIT TIMES

RIGHT SKILLS FOR ROLE

CONVENIENT HOURS OF OPERATION

EFFICIENCY & PRODUCTIVITY

RIGHT SIZE EMPLOYEE WORKLOAD

MORE SHIFT FLEXIBILITY

MORE CONTROL OVER WHEN & HOW THEY ARE SCHEDULED

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?

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

CUSTOMER EXPERIENCE

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?

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?

EMPLOYEE BENEFITS

DO YOU HAVE:

TRANSPARENCY & ACCOUNTABILITY

CENTRALIZE FIRST PASS SCHEDULES & ASSIGNMENTS

AI-POWERED ABOVE-BRANCH OPTIMIZED SCHEDULES

EASY-TO-USE MOBILE INTERFACE

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?

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

Integrating to teller transaction platform or lobby management system for real-time work assignments

New processes or organizational changes like centralized scheduling

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

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

Learn more about Centralized Scheduling

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

HOW QUICKLY DO YOU NEED YOUR SYSTEM IMPLEMENTED?

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

WHO AND HOW WILL THE SYSTEM BE RUN ONCE IMPLEMENTED?

FACTORS EFFECTING TIMELINE:

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?

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?

REPORTING OR ACTIONABLE INSIGHTS?

WHAT’S NEXT?

More than just the questions you might think about when implementing a WFM system, what information is valuable to make a decision, what outcomes do you need to consider, and who do you need to involve in the decision making process you might be asked to make when implementing a WFM system.

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.

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