Do you ever lay awake at night wondering, “Billy’s my star performer, but what if he doesn’t come in on Monday (again)? Am I going to have enough staff? If I’m short-staffed, how will I cover the workload, projects, and contact volumes?” In my capacity as an instructor for the HDI Support Center Manager course, I’m often asked what to do about analysts who are “star performers”…when they show up. That’s a million-dollar question. But what’s the right answer?

Before answering, I ask my students to consider two questions:

1. How are you measuring analyst performance?
2. What makes an analyst a star performer?

Responses vary from “You know, I don’t really know” to specific metrics used to measure performance consistently. My answer? If Billy (or any other analyst) can’t show up for work (attendance) and be on time for work (adherence) and logged in to work (available) per documented guidelines, then he really isn’t a star performer.

If you’ve got star performers who aren’t performing in key areas, then you may be overlooking a big piece of the puzzle!

When building an analyst-level balanced scorecard, focus on those measures that are within the control of the analyst and have the greatest effect on the overall success of the support center. So what can analysts control? Let’s take a look at the Three As:

- **Attendance**: Analysts must show up for work.
- **Adherence**: Analysts must arrive to work on time as scheduled and complete scheduled activities throughout the day (i.e., meetings, training, coaching, etc.).
- **Availability**: Analysts must be logged in and available to accept work, and they must track the amount of time they spend working.

These and other metrics, like occupancy and shrinkage, fall under the heading of workforce management. When analysts fail in any of these areas, it makes it very difficult for the support center to operate efficiently. So let’s break down the elements of workforce management and look at these metrics individually.

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**Workforce Management:**

**Underutilized Metrics for Success**

By Fancy Mills
Workforce Management, Defined

The objective of workforce management is to determine the resource requirements—staffing and scheduling—necessary to meet demand. Staffing focuses on determining the number of people needed by the business to meet service level targets, while scheduling refers to the specific job assignments (including tasks and time frames) people are required to complete to meet service level targets. These targets include average speed to answer, abandonment rates, and first contact resolution, as well as any other targets the business or its customers require.

The goals of workforce management include aligning resources with the needs of the business, properly forecasting requirements for the business’s current and projected needs, and consistently adjusting staffing and scheduling requirements to meet service level targets.

Key Workforce Management Metrics

Individual analyst behavior affects the overall performance of the support center. Understanding these workforce management metrics is one of the keys to ensuring that your support center is able to fulfill its current and forecasted staffing needs and, therefore, meet its service level targets.

Attendance

It goes without saying that attendance is an essential job requirement for every analyst. After all, they have complete control over whether or not they show up for work. Working with human resources, support centers must establish strict attendance policies and document them in their standard operating procedures. As part of the onboarding or new-hire process, each analyst should be required to review and sign this policy.

Attendance is a component of shrinkage and should be closely monitored. This means tracking unscheduled time away or absences from work—defined as time away from a scheduled shift due to absences, late arrivals, and early departures—which, in turn, can be tracked separately from or together with adherence. However you track it, it’s important to have a policy that consistently tracks attendance and calculates how much time is lost due to attendance and adherence issues. The sample attendance and adherence policy below tracks occurrences by the minute and then calculates the points to identify the coaching action the analyst’s manager needs to take.

<table>
<thead>
<tr>
<th>Total Points</th>
<th>Coaching Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3–5 points</td>
<td>Coaching</td>
</tr>
<tr>
<td>7 points</td>
<td>PIP notice</td>
</tr>
<tr>
<td>9 points</td>
<td>Written warning</td>
</tr>
<tr>
<td>11 points</td>
<td>Final written warning</td>
</tr>
<tr>
<td>12 points</td>
<td>Termination</td>
</tr>
</tbody>
</table>

5–30 minutes = ½ point | 31–120 minutes = 1 point | 121 minutes to 1 full scheduled shift missed = 2 points
Adherence

Adherence (sometimes called compliance) is a metric used to define what percentage of the time and at what rate analysts are complying with or adhering to their schedules. Arriving to work on time and attending scheduled activities throughout the day (i.e., meetings, training, coaching, etc.) are all part of tracking adherence. Let’s consider the following sample calculation.

<table>
<thead>
<tr>
<th>Scheduled</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift</td>
<td>7:30 a.m. – 3:30 p.m. (8.5 hours or 540 minutes)</td>
</tr>
<tr>
<td>Breaks</td>
<td>9:00 – 9:15 a.m. 2:00 – 2:15 p.m.</td>
</tr>
<tr>
<td>Lunch</td>
<td>11:30 a.m. – 12:00 p.m.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Actual</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift begins</td>
<td>7:10 a.m. (10 minutes late)</td>
</tr>
<tr>
<td>First break</td>
<td>9:15 – 9:30 a.m. (15 minutes late)</td>
</tr>
<tr>
<td>Lunch</td>
<td>11:30 a.m. – 12:03 p.m. (3 minutes late)</td>
</tr>
<tr>
<td>Second break</td>
<td>2:00 – 2:17 p.m. (2 minutes late)</td>
</tr>
<tr>
<td>Logged into unknown auxiliary code</td>
<td>2:17 – 2:27 p.m. (10 minutes)</td>
</tr>
<tr>
<td>Shift ends</td>
<td>2:27 p.m. (3 minutes early)</td>
</tr>
</tbody>
</table>

TOTAL = 43 minutes out of adherence

What impact do these forty-three minutes have on the schedule, the team, the support center, and the business overall? Lost adherence time can lead to lost customers via abandoned contacts, higher average speed of answer, lower first contact resolution, lower customer satisfaction, lower team morale, and lower analyst satisfaction because the analysts that do show up for work and on time have to make up for the analysts that don’t come to work or show up on time. The effects can be dramatic, so support centers must set targets or rates of acceptable adherence (e.g., 5% adherence, meaning analysts can be no more than 5% out of adherence for a specific time frame).

Availability

Availability is a measure of the amount of time an analyst is logged in to the system and “available” to handle incidents and service requests. If an analyst is absent, he obviously can’t be available, and if an analyst has adherence issues, this also negatively affects availability.

Occupancy

Occupancy is the measure of how much time an analyst is actually handling customers via whichever service delivery channels the support center is using (phone, walk-up, email, chat, etc.). If an analyst isn’t in attendance and isn’t logged in (available), then she isn’t occupied.

Workforce Management

Self-Assessment

Attendance

- Does your center have a documented attendance policy? If yes, has each analyst signed off on the policy?
- How are you tracking attendance? Points? Hours?
- What are the consequences for nonadherence?
- What reward policies do you have in place?
- Does HR support your attendance policy?

Availability

- Has your support center set availability targets?
- Are your analysts using auxiliary codes to track their time? Are they using them correctly?
- Do you have ring, no answer, or requeue issues? (This is when analysts are logged in as available, but they aren’t accepting contacts.)
- What is the biggest barrier or challenge to increasing available time?

Adherence

- Has your support center set adherence targets?
- What is your policy or target?
- How are you tracking adherence?
- Do you have the tools to track adherence (e.g., tracking via auxiliary codes or a workforce management system)?
- What are the consequences for nonadherence?
- How do you foster adherence without encouraging a “Big Brother” mentality?

Occupancy

- How can you increase occupancy?
- What are the risks? (Hint: Think of the Law of Diminishing Returns—more analysts does not mean higher occupancy.)
- What is the optimal level of occupancy for your center?
- If you add staff, will that increase or decrease occupancy?

What other metrics should support centers track?
Share your workforce management metrics on HDICongnct.com.
Shrinkage

Shrinkage is defined as planned and unplanned paid time when analysts are unavailable to handle contacts. Shrinkage must be calculated and factored into workload forecasts to determine the accurate number of staff required to meet demands; inaccurate shrinkage calculations can have a dramatic effect on your perception of the resources your support center needs. But what exactly is shrinkage? Planned shrinkage includes such things as breaks, training, coaching, meetings, projects, administrative tasks, holidays, vacations, PTO (paid time off), company events, jury duty, FMLA (unpaid), and disability (unpaid). Unplanned shrinkage, on the other hand, includes unscheduled absences, adherence, “goof-off” time, technical issues, fire drills and other threats, and any other unplanned time away.

Shrinkage is a very serious metric. I recently worked with a support center whose shrinkage rate was around 45 percent, much of that unplanned. The director came to me and said, “I can’t go to upper management and ask for more staff or resources when I am not appropriately using the resources I have.” We took the following steps to improve the support center’s shrinkage rate.

1. **Conduct supervisor and team lead training.** This training focused on attendance, adherence, and availability. Supervisors and team leads learned how individual analyst behavior could affect the entire center, and they learned how to calculate shrinkage and manage the key areas that lead to shrinkage

2. **Define, develop, document, and implement standard operating procedures.** The analyst-level SOPs included attendance, adherence, and availability guidelines. We defined auxiliary codes and each analyst was trained on how and when to utilize them. Finally, after discovering that more than 50 percent of calls were being placed on hold, we developed hold and escalation procedures.

3. **Calculate analyst shrinkage.** We calculated shrinkage at the analyst level using ACD reports that provided details on log-in/log-out time and auxiliary code usage. This was used to identify the biggest offenders and jump-start the coaching and corrective action process.

4. **Calculate support center shrinkage.** We then calculated shrinkage for the support center as a whole to determine how shrinkage was affecting forecasting and overall efficiency. We discovered that team meetings were running too long and being held during peak times, analysts were being pulled off during peak times to work on projects, hold times were too long, and analysts were escalating issues they could have solved themselves.

Focusing on these specific workforce management metrics—attendance, availability, adherence, occupancy, and shrinkage—can have immediate benefits, including reducing negative shrinkage and increasing adherence and attendance. It will also enable support center management to make accurate forecasts and use their resources more wisely. Only by balancing attendance, adherence, availability, occupancy, and shrinkage with other key performance indicators and metrics can support center leaders accurately determine who their star performers are and sleep better at night.

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**Strategies for Reducing Shrinkage**

Focus on accurately calculating shrinkage. Do you have a process or do you need to invest in a tool?

- Educate your supervisors, team leads, and managers on the topic. Focus on calculating, monitoring, and managing.
- Improve your shrinkage forecasting. Again, do you need to invest in a tool?
- Focus on proactive scheduling (e.g., meetings, training, breaks, lunches, coaching, projects)
- Look for shrinkage patterns.
- Develop adherence policies.
- Monitor and manage analysts via the policies documented in your SOPs.

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**ABOUT THE AUTHOR**

Fancy Mills has more than ten years of experience in classroom training, consulting, and recruiting, specializing in the technical support and call center industry. As a member of the HDI Faculty, she has helped certify more than 20,000 support professionals, managers, directors, and corporate trainers. In addition, she has facilitated courses in presentation, communication, and time management, and she’s presented at industry conferences and events.