

WORKFORCE PLANNING & SCHEDULING IN CONTACT CENTERS



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TRAINING CENTER



Introduction

Workforce Planning & Scheduling in Contact Centers Training Course equips operations professionals with the analytical skills to forecast demand and schedule agents efficiently. Contact centers depend on accurate workforce planning to maintain service levels while controlling labor costs. This course explores forecasting models, Erlang C calculations, and scheduling optimization techniques used to balance staffing with call volume fluctuations. Furthermore, participants examine how real-time adherence monitoring and intraday management practices help managers respond quickly to unexpected demand shifts. As a result, learners gain the confidence to build accurate staffing plans that support both customer satisfaction and operational efficiency. By the end, participants hold practical tools to strengthen workforce planning functions in any contact center environment.

Workforce Planning & Scheduling in Contact Centers Course Objectives

- Apply forecasting models to predict contact center call volumes
- Use Erlang C calculations to determine required staffing levels
- Design agent schedules that align with demand patterns
- Apply shrinkage factors to build realistic staffing plans
- Monitor real-time adherence to identify scheduling gaps
- Apply intraday management techniques to address demand shifts
- Calculate service level and occupancy metrics accurately
- Design shift bidding and rostering processes
- Apply workforce management software tools to scheduling tasks
- Interpret staffing reports to support capacity planning decisions

Course Methodology



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- Interactive lectures on forecasting and scheduling frameworks
- Hands-on workshops applying Erlang C calculations
- Case studies using real contact center staffing data
- Group exercises building schedules and rosters
- Guided practice with workforce management software tools
- Peer review of staffing plans and forecasts

Who Should Take This Course

- Workforce planning and scheduling analysts
- Contact center operations managers
- Team leaders responsible for staffing decisions
- Workforce management system administrators
- Customer service planning professionals
- Professionals seeking to strengthen contact center staffing skills

Workforce Planning & Scheduling in Contact Centers Course Outlines

Day 1: Foundations of Contact Center Workforce Planning

- Define workforce planning and its role in contact center operations
- Introduce key metrics such as service level and occupancy
- Explore the relationship between forecasting and staffing accuracy
- Review common workforce planning challenges



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- Introduce workforce management software tools
- Discuss the impact of staffing decisions on customer experience
- Set workforce planning objectives aligned with business goals

Day 2: Forecasting Call Volume and Demand

- Apply historical data analysis to forecast call volumes
- Use trend and seasonality models for demand prediction
- Apply the Erlang C formula to calculate staffing requirements
- Account for shrinkage factors in forecasting models
- Distinguish short-term and long-term forecasting methods
- Validate forecast accuracy against actual demand
- Adjust forecasts for planned campaigns and events

Day 3: Building Schedules and Rosters

- Design agent schedules aligned with forecasted demand
- Apply shift bidding processes fairly and transparently
- Build rosters that balance coverage and agent preferences
- Apply break and lunch scheduling best practices
- Address scheduling conflicts and last-minute changes
- Use scheduling software to automate roster creation
- Review compliance requirements in schedule design

Day 4: Real-Time Management and Adherence

- Monitor real-time adherence to scheduled shifts
- Apply intraday management techniques to address demand shifts



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- Identify causes of schedule adherence gaps
- Reallocate resources during unexpected volume spikes
- Communicate real-time changes to agents effectively
- Track occupancy and utilization throughout the day
- Apply escalation procedures for critical staffing shortages

Day 5: Capacity Planning and Continuous Improvement

- Interpret staffing reports to support capacity planning
- Apply workforce management software analytics for long-term planning
- Calculate the cost impact of staffing decisions
- Design continuous improvement processes for workforce planning
- Align workforce planning with organizational growth strategies
- Build a workforce planning dashboard for stakeholders
- Review case studies of successful workforce planning transformations

Conclusion

By successfully completing Workforce Planning & Scheduling in Contact Centers Training Course, participants will have acquired practical knowledge in forecasting call volumes, applying Erlang C calculations, and building schedules that balance service levels with cost efficiency. Learners leave equipped with real-time management skills to handle demand fluctuations confidently. As a result, participants can strengthen workforce planning functions within their organizations. Gentex Training Center designed this course to help contact center professionals apply forecasting and scheduling techniques with immediate, practical impact.





FAQs

Q1 What is the "Workforce Planning & Scheduling in Contact Centers" course about?

This course covers how to forecast call volumes and build agent schedules that meet contact center service levels. It introduces forecasting models, Erlang C calculations, and intraday management techniques that help planners balance staffing with demand.

Q2 What are the key benefits of the "Workforce Planning & Scheduling in Contact Centers" course?

Participants learn to reduce overstaffing and understaffing costs, improve service level consistency, and respond faster to demand fluctuations. These benefits help contact centers maintain customer satisfaction while controlling labor expenses.

Q3 What skills will I gain from the "Workforce Planning & Scheduling in Contact Centers" course?

Learners gain skills in call volume forecasting, Erlang C staffing calculations, schedule and roster design, and real-time adherence monitoring. These four skills prepare participants to manage contact center staffing with precision.



Q4 What tools, methods, or standards are covered in the "Workforce Planning & Scheduling in Contact Centers" course?

The course covers the Erlang C formula, shrinkage factor calculations, workforce management software tools, and intraday management techniques. These frameworks give participants a standardized, industry-recognized approach to contact center workforce planning.

Q5 How is the "Workforce Planning & Scheduling in Contact Centers" course applied in real-world practice?

Professionals apply these techniques when building weekly staffing plans, managing unexpected call spikes, or optimizing shift rosters. Practitioners use real-time adherence data to adjust staffing quickly and maintain consistent service levels.