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How to avoid the 5 most common mistakes in forecasting in the contact center

Resource forecasting in contact centers needn't be a complicated affair. Start by avoiding the most common mistakes and stick to the basics, says Nick Brook

LONDON, UK, November 2, 2018 /EINPresswire.com/ -- Today's contact centers are complicated beasts. The people working in them are expected to be super-agents with multiple skills and knowledge. While customers expect to receive consistent service in the channel of their choice i.e. by phone, email, Chat, SMS and social media. At first glance, managing this complex environment might seem like an impossible task but it doesn't have to be that way. If you avoid some basic mistakes and combine a robust forecasting process with the latest Workforce Management (WFM) technology even the most magnificent beasts can be tamed.

> "Once aware of the pitfalls, a process-driven approach to forecasting supported by the latest cloud-based Workforce Management (WFM) technology can be adopted."
>
> *Nick Brook, Project Mgr & Consultant, Teleopti*

Five common forecasting pitfalls and how to avoid them

Even with the perfect forecast and best intentions, things don't always go to plan and mistakes can happen. Here are the most common reasons for incorrect forecasts:

1.Lack of historical data – and/or failing to archive previous forecasts. Access to accurate data along with a recorded audit trail of previous forecasting activities provides a solid foundation for future forecasts. Remember to archive all forecasts.

2.The validation process – fail to plan, plan to fail applies to forecasting. Everything changes over time including channels, agent preferences and unplanned absences. Therefore it pays to keep on top of change and factor it into the forecast. That way, the contact center is always ready to react swiftly and effectively to the unexpected. Generate new forecasts by month, week or by day based on known forthcoming events.

3.Working in isolation – make sure planning teams communicate and work with other parts of the business to improve forecasting. Make it easy to work with sales and marketing to know about planned promotions and advertising campaigns so when they generate enquiries agents are available are ready for action.

4. What about 'what ifs' – why waste time and money on forecasts that don't work when a 'what if' exercise can help with forecasting and reliably model for future requirements? Choose a WFM solution that includes "what if" modeling and know how to use it. Remember to incorporate buffers to allow for unexpected spikes in activity and unplanned absences.

5. Once is not enough – processes like businesses are not static. They are constantly moving and require frequent re-evaluation to increase efficiencies and gain competitive edge. Reviewing processes and historical data should be a regular diary date, at a set time of the week and at least once a month.

Now you are aware of the pitfalls, adopt a process-driven approach to forecasting supported by the latest cloud-based Workforce Management (WFM) technology. Download Teleopti's “how-to” guide - ‘Tips and techniques for accurate, effective forecasting’ to fine tune your forecasting and get that margin of error as low as possible. Finally, whatever you do, don’t cut corners. Successful forecasting is easier than it at first appears - just take a measured approach and avoid those five common pitfalls.

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