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## Overview

This standard is about managing resource planning and improving resource allocation in a contact centre. It covers monitoring the demand for services within a contact centre environment and how resources are managed. It involves monitoring activity levels, forecasting demand, planning and allocating resources. You will review approaches to demand, forecasting and analysis; you will work with colleagues to share information on trends and recommend any changes to organisational resource policies. It is for contact centre professionals on supervisory or managerial levels who manage resource planning and improve resource allocation in a contact centre.

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## Performance criteria

### You must be able to:

#### **Devise and develop organisational approaches to demand forecasting in a contact centre**

1. identify organisational strategy and objectives that provide pointers for future demand levels
2. identify metrics that represent demand for contact centre services
3. monitor short term demand to analyse immediate resource needs for contact centre staff
4. review current organisational approaches to demand forecasting and identify potential alternative models
5. apply forecasting techniques to predict future demand for contact centre resources
6. assess confidence limits of demand forecasts
7. identify current available employee data to match resources against demand forecasts
8. identify anticipated changes in demand for contact centre resources and the reasons for these changes

#### **Communicate resource information to appropriate colleagues**

9. summarise and brief colleagues on demand trends and forecasts, resource availability and implications for meeting organisational objectives
10. agree on resource demands and factors that influence the allocation and deployment of resources
11. consult colleagues about different options for ensuring that resources can be deployed to meet demand

#### **Carry out scheduling and staffing activities**

12. analyse demand forecasts to identify resource requirements in a contact centre area

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13. identify staff availability, constraints and preferences for work scheduling
  14. analyse scheduling requirements within overall demand forecasts
  15. use appropriate planning tools to create resource plans
  16. allocate and deploy resources in the contact centre in a way that optimises efficiency and effectiveness
  17. modify schedules to meet identified changes in demand

**Contribute to the development of resource policies in a contact centre**

18. identify current organisational resource policies in the light of organisational objectives
19. review organisational resource policies in the light of organisational objectives
20. consult with colleagues regarding resource policies and the need for any developments
21. recommend and agree changes to organisational resource policies
22. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

## Knowledge and understanding

### You need to know and understand:

1. the range of services or products offered or supported by your contact centre
2. the organisational requirements, external regulation and legislation relating to resource development
3. the organisational strategies and objectives that may impact on resource planning
4. the organisational procedures and guidelines relating to resource development
5. the importance of using metrics in resource planning in the context of efficient and effective contact centre operations
6. the techniques for monitoring and analysing immediate resource needs in a contact centre
7. the methods of demand forecasting to predict future requirements for contact centre operations
8. the importance of using confidence limits in demand forecasts in contact centres
9. the types of employee and work record data that can be held
10. how to use employee data and work records to contribute to resource planning in a contact centre
11. the sources of information that enable you to predict changes in demand and identify the reasons for them
12. the importance of communicating with colleagues about contact centre demand levels, resource availability and resource plans
13. the importance of reaching agreement with colleagues on allocation and deployment of resources
14. the techniques for identifying different options for meeting resource demands
15. the planning tools for resource scheduling
16. how to analyse demand forecasts to identify and agree resource requirements
17. the importance of considering staff availability, constraints and preferences when carrying out work scheduling
18. the modifications that may be required to scheduling activities
19. the techniques for managing changes in resource policies for contact centre operations
20. how to identify and review resource policies against organisational objectives
21. the importance of consulting with colleagues on resource policies to identify changes and improvements
22. how to present recommendations for changes to resource policies
23. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

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Manage resource planning and improve resource allocation in a contact centre



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