

OPX Workforce Management

Transform your digital operations with OPX

opx



Workforce Management is a core module of OPX and comprises of several key aspects to ensure we get the *right resource* to do the *right work* at the *right time*.

Overview

OPX has an inbuilt advanced workflow engine based on delivery of most BPMN2 (Business Process Management Notation) processes. It can handle most BPML (Business Process Modelling Language) concepts as they are turned into BPEL (Business Process Execution Language).

However, managing real resources requires more than just a workflow engine, rules engine and web forms. Some key human and robotic concepts need to be considered for getting the most out of your available resources.

Workforce Management in OPX

Workforce Management in OPX is all about *big data* on requirements and resource availability. Basically, gather as much information about the demand (service requests) and supply (humans and robots) as possible at a granular level. Then use this information to continually tie up the two to deliver the following:

- optimal quality
- optimal throughput and productivity
- optimal utilisation of a resource

And to inform you about:

- pending SLA breaches beforehand
- unexpected demands
- unexpected shortages of capacity
- skill shortages at a granular level

OPX empowers you to take control and balance demand and supply. It helps you automate and handle the complex pressures more easily. OPX does not require team leaders to allocate work to individuals. They are only required to handle exceptions, freeing them to manage their teams' skills progression, well-being, and value to the company.

OPX & Planning

OPX can be used to do traditional planning. In the real time world, we have a current plan. We also have forecasting plans, for a longer view of the proposed demand and supply. OPX dashboards can also be used to:

- create your plans
- forecast demand & capacity

OPX has the daily and weekly demand from the historic period in MIS summary tables. It also has the completed work by the teams and their skills at a granular level. We do this using your data from OPX¹ and our inbuilt dashboard spreadsheet² capability where users can use well known functions like *forecast* and *trend*, or an added function by ourselves, such as *Erlang B*³.

This solution provides you with *user defined functions* in a spreadsheet format which retrieve OPX data and populate your spreadsheets' cells. For example, you can call a function to return your:

- team members
- cases in a queue
- demand last year

This powerful interface allows you to define your own formulas on the base data and get MIS and dashboards your way. You can even load up your existing spreadsheet-based planning templates.

¹ Or external sources available via imports or OLE-DB interfaces

² Everyone's forecasting is different, so we tailor with you as part of the install.

³ Added functions are optional and we are happy to add your specific requirements for example calling externally licensed Monte-Carlo simulations.

Terminology	Meaning
Service request	A request from a client (any type of customer, partner, other team, suppliers) for some work activity.
Service level	An expected timeframe for delivery of a service. These may vary dramatically by the type of request or the requestor and there may be several service levels both internal and external.
Organisational structure	The structure of the organisation is often very indicative of both permissions and controls. For example, managers get to see team members statistics, while the print room staff rarely get to handle payments.
Team	A group of people being managed and providing themselves a set of service capabilities.
Allocated team	An individual may move to a different working team for a period depending on pressures of business requests and their ability to help when this happens. We say they are in an away team as they are still managed by the direct team manager.
Skills	Individuals and robots have some skills. These skills allow them to handle some (but not all) pieces of work in a company. OPX handles skills, not just at the process and activity levels like some workflow systems, but at the case object level as well. For example, case objects may have a company, client-type, product category, product, issued-year, core-system-required or other skills you wish to define.
Skill key	Some skills are hierarchical. For example, if a team member can handle work for process A, activity A1 from one company, we would have a skill key for that person of Company A>>ProcessA>>A1, but a teammate or robot might handle all companies and activities, so *>>ProcessA>>*
Competency	You may be skilled, but poor at a particular task. It is useful for scheduling and team leaders to know these skill levels. OPX has company-defined skill levels and a mechanism for reducing them if the user does not continue working on a particular type of case, as well as pointing this out to their manager.
Process	A process is a series of mandatory and optional activities to deliver a service request to completion.
Activity	An activity is a step in a process.
Allocated queue	Any individual team may be able to handle tens or hundreds of activities but that does not mean they should get to choose what to do. OPX has the concept of a human or robot allocated to an activity queue, either automatically based on their skills or fine-tuned by their manager.
Priority	Some requests have a higher priority than others. Some processes and activities have a higher priority. OPX has priority per case.
Expected Handling Time	The expected handling time of an activity for planning. OPX records EHT and can derive them after a few days of work to save you getting a stopwatch out.
Average Handling Time (activity)	The average handling time of an activity in general. This is often calculated by rolling averages to avoid seasonal drift. OPX provides AHT.
Actual Average Handling time (human/robot for activity)	For each human or robot, what is their actual average handling time. OPX reports on all granular data like this and can show league tables by skill key.
Case work	As the Scot Adam Smith pointed out over 230 years ago in his seminal <i>Wealth of Nations</i> , in some business processes, it is often best to break them up into steps to be completed by different people, not by the same person (or robot). There are many reasons for this, enumerated by Deming and others. The opposite is also true in that some cases, where the setup time or learning curve is large and the hand-off of a case is short, the case should be sticky – i.e., the next activity step in the process should be done by the same person. In even rarer cases, done at the same time. OPX handles all of these scenarios.
Due date	From the requestors and companies' point of view, given an SLA or contract the date (or date and time) when a service request is going to be due for delivery. OPX calculates these for the requests as they arrive.
Expected delivery date	From the perspective of “if there are no changes to our current working practices, when would this service request be delivered?”, OPX calculates the expected delivery date for service requests including any grace period you may want to add. Major changes in resources or demand may alter the date. OPX can recalculate these, usually overnight. Priorities can change if the expected delivery date has been published to the requestor by an escalation process automatically to aim to hit the promise.
One and done	Some service requests especially interactive ones in a front office or mid office (chat/SMS) can be completed at the same point in time as the request. We call this <i>one & done</i> . Others, like calls awaiting answering, can be handled by the back-office team or the same person later in the day.
Blending	Front-office teams are likely to be a thing of the past with just team members - some with telephone skills and some without telephone skills. We think everyone is the same. For traditional call centres, they have no work conceptually allocated to them, but we record when they are free and if not taking calls, expect them to handle short EHT cases. They can pick up and put down work during calls. They may take an hour to complete a 10-minute EHT. OPX tracks the pick-up and put down to get an actual case time, as well as providing ID&V (identification and verification), VOD (voice of dissatisfaction), Complaints, cool down (after call recording work) and scripts via ScriptFlow, which allow lesser skilled team members to execute a script from a SME (Subject Matter Expert). This helps reduce the backlog against the SME for simpler cases when there are higher demand peaks or when many SME are out of office - it's an 80-20 type rule.