



# WORKFLOW VS WORKFORCE MANAGEMENT

INTRODUCING OPX - THE WORKFORCE  
MANAGEMENT SYSTEM



# INTRODUCTION

People are often confused by the industry terminology, and vendors don't make it any easier to understand.

There are several differences between the workflow vendor's approach to case processing and the workforce vendor's approach to operational excellence.

Wikipedia describes workflow as:

*"A workflow consists of an orchestrated and repeatable pattern of business activity."*

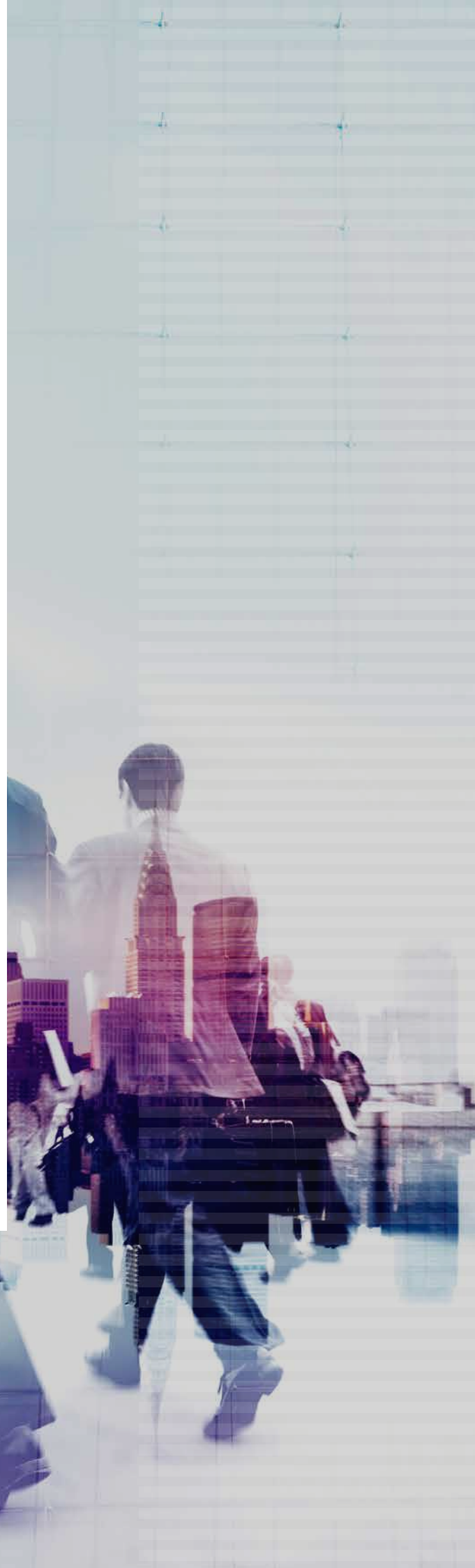
And workforce management as:

*"Workforce management is an institutional process that maximises performance levels and competency for an organisation."*

But in the modern world, it's hard to imagine that the two are disjointed. In order to manage an organisation, there needs to be a clearly defined set of services being provided, and one or more business processes to provide those services.

It's rare to see anyone actually model the services a company provides but it is well worth the effort, at least to clearly explain to everyone what the company is doing, where things fit and how the company does them. This is often described as the **what**, the **how** and the **with**.

Workflow vendors are interested in gathering information about the process used in the delivery of a service. This is often with a view to automating the process where possible, using rules engines and tracking cases through sequential or parallel activities.



# WORKFLOW VS WORKFORCE MANAGEMENT

Workflow has been the basis of automating processes since the mid-nineties.

Workflow has become increasingly more technical, both in the definitions such as BPMN (Business Process Management Notation) and in the implementation technologies. It belongs as a project in the class of Business Process Re-Engineering, and is unlikely to have any project happen quickly (less than a year).

Workflow often involves a great deal of business analysis followed by a development stage (changing core business systems) and then a test phase which will involve technical and end-user acceptance criteria. Nowadays, workflow is a joint effort between the Operations and IT departments.

Workforce Management is about managing people and processes.

Workforce Management deals with the **who** as well as the **how**. Workforce Management systems, often referred to as Back Office Work Force Optimisation (BOWFO) or WFO for front office, are less interested in the nitty gritty of IT re-engineering (and building new core systems with embedded workflow processes) and more interested in monitoring and management as a means of increasing productivity.

Workforce Management systems provide operational intelligence on **what** is going on **where**, and **who** is doing it, with which systems. They can be used to identify where people are underperforming or where there are major resource shortages, surpluses or system bottlenecks.

This is often a great way of spotting areas that need further re-engineering, providing the business data needed for the business case of the larger, longer running re-engineering projects.

Workforce Management understands the processes but, unlike workflow systems, is often looking at a higher level. A Workforce Management (WFM) system does not implement the back-end system, it is usually interested in the hand-offs of a case (or sequential tasks) at a high level.

For example, in a WFM system, changing address may be a task that takes eleven minutes. In the back-office system, this may involve several screens or applications which an embedded workflow system would have drawn out the process steps and implemented. This is of less interest for optimisation unless the eleven minutes is an issue.

Workflow systems tend to provide information based on activities at a granular level, such as the number of new cases per process being started, and can often report on each activity including who has completed the work. Rarely do they do this with regards to customers, products, service level agreements, skills required or skills available, except for the permission skills in the processes or activity.

Workforce Management at an operational level (rather than IT) is specifically about real-time MIS, such as:

- backlog work in the queues
- new work being added by source
- rework
- the time taken to process a case by each person/robot before handing off
- the quality outcomes for a team or individual
- skills required for the demand coming in
- skills available (human capacity)
- resources available
- productivity, utilisation, efficiency

In short, a WFM system manages cases through processes, and the routing of these cases by business rules. A workforce management system manages the demand and resources placed on operations looking at the people and processes in a different manner.

WFM systems can be managed, changed and enhanced by the Operations team with little or no involvement from the IT team. The same cannot be said for workflow products.

# WORKFLOW VS WORKFORCE MANAGEMENT OPTIMISATION

Part of the difference between WFM and workflow solutions is the level of detail and the way the two systems look at handling workload.

WFM systems answer operational questions using cold hard facts about *who* is doing *what*, *where* and *when* to provide operational insight.

They provide the same case management tracking type features at a much lower level of detail and provide operational perspectives on this more granular data.

## What are my people doing?

In a workflow system, everything is case centric. For example, they are often limited to providing you with information on the cases an employee has worked on rather than providing the full picture of what the employee has done all day.

WFM systems record a person from the minute they get to the office until the time they leave, identifying everything the person has been involved in including meetings and non-transactional work. Workflow systems tend to only handle transactions and so, for example, miss idle-time where the person was not on a break and not working on business activities.

WFM systems also usually provide dashboards showing what's happening in real-time and allow drill down to see what an individual has been doing and is currently working on. This is invaluable for tuning the automated work allocation systems when business demand changes quickly.



## Have I got the right people for the work?

Workflow systems, like WFM systems, can tell you the demand they have processed. However, WFM also covers non-transactional demand. WFM excels in displaying the skills in relation to the process activities.

All workflow systems have some skills at a company/process/activity level, showing that a logged-in user can get work from a process activity queue for a given company.

However, WFM systems drill this down and break up this work into skill keys. Skill keys look at the data in the individual piece of work and then look at the skills an employee has before they allocate the work to them.

For example, although there may be a claims validation check in the process, it could be that certain products need unique skills, either in the product or the back-office system administrating the product. Workflow systems can result in allocated cases being returned because the user who was allocated the case did not have the skills. WFM systems never give then the cases in the first place.

Breaking the work demand queues into smaller sets allows you to see many operational insights, such as “how many people do I have that can process *Product X* or *Platform Y*?”. This is invaluable when used with capacity planning and workforce scheduling.

Skills are fungible. WFM systems usually have skill matrices, and skills have competency levels often maintained by doing the work. In a WFM system, people can go from trainee to expert by doing the cases and passing the QA. Usually you can have any level of skills you need over and above a simple process activity.

## Have I got the right people right now?

Business is about getting work done in a timely and cost-effective manner. Workflow tends not to understand this as well as WFM solutions.

For example, a WFM solution cannot only allocate the work to individuals in real-time, it can track and monitor SLAs, identify hot spots, identify which individuals in your team could be re-allocated to help, identify which individuals in the whole company could be drafted in to help in a hotspot situation, and provide visualisations.

In a WFM system, moving work from one department to another, from one site to another or from one country to another takes only a minute or two. Adding a person in a different team/site/country to help with your backlog due to their skills takes seconds (with their manager's permissions). They can even do both managers workload, prioritising their home work over their away work.





## Have I got the right people going forward?

Unlike workflow systems, WFM systems think *big data*. They record as much data as often as they can at as low a level as they can, providing the ability to take these data points and analyse them as required. One use is for capacity planning.

WFM systems often have modelling capability inside the system. In our case, we use a spreadsheet metaphor (not Excel, although you can use this if you want) which allows models to build on historic or projected data and can get raw data or summarised data as needed.

Using this approach, the assumptions can be varied allowing a *what-if* approach to modelling capacity and forecasting.

Using historic data, we can derive or compare real previous values with anticipated values for many of a model's inputs.

Using actual (as opposed to estimated) average handling times for a process, we can predict the head count required per day, week, month, quarter and year as required. For producing target operating models, the inbuilt modelling system can use costs or all the data exported or interfaces into Excel.

WFM systems are also often aware of Robotics (RPA), and treat robots like humans, giving them skills and tracking average handling times.

For example, in OPX you might decide that claims under £5000 are processed automatically by robots with only data exceptions being handled by humans, while claims over £5000 are always processed by a human. You may vary this by book of business or plan.

## How do I handle the digital age?

Unlike WFMs, workflow systems are just a part of the puzzle from an operational perspective. A WFM cannot provide all of the parts of the solution such as automated call distribution, but it can work with all of the parts of the digital solutions to provide a comprehensive dashboard and monitoring mechanism.

For example, WFMs can help with blended operations providing:

- identification and verification systems
- complaints and *voice of dissatisfaction* processing
- “one & done” recording in the front-office with seamless handover to back-office
- ensure higher utilisation in the front-office by operators handling simple back-office work items
- script based solutions allowing back-office staff to handle call centre overflow quality
- workforce team scheduling, handling multiple shifts, shift rota, holidays.

And, for example, help with process adherence and quality:

- scripting of customer interactions
- scripting or robotic interactions via portals, SMS or email
- checklists at every required stage or processing
- quality assurance using open and closed QA activities, sampling and reporting.
- automated escalation

And, for example, assisting with compliance teams work:

- full audit trail of interactions
- Financial Ombudsman reporting solutions
- Treating Customers Fairly (TCF) data reporting solutions
- conduct risk related data and reporting

As we move forward to having multiple incoming channels and multiple outgoing communication channels, we will need more solutions to keep track of an interaction and request, and the status of these from the customer perspective. OPX can track this.

## Which other features are in a full WFM solution?

For each of the various vendors, the features and capabilities can vary wildly. OPX from CMS has many modules and features and is continually being enhanced with several releases per annum.

### Want to know more about OPX?

Arrange a free demo and find out how OPX could support your business at:  
[corporatemodelling.com/opx-demo](http://corporatemodelling.com/opx-demo)



# ABOUT US

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Founded in 2008, we have more than 35 years of experience in the field; we know the workforce optimisation space like the back of our hands.

The nucleus of the Corporate Modelling Services development team, based in Glasgow, UK and has been working together for over 15 years providing transformational software solutions to solve key business operations efficiency problems.

OPX is the result of over 200 man years of business focused enterprise software development and was conceived to provide a broad, functional, cost effective and yet easy to implement solution to aid the digital transformation of back office operations.

Every customer is unique. That's why we customise our OPX platform to fit every customer's needs precisely. Our Rapid Deployment Method (RDM) takes clients through the five steps of an OPX implementation in around 30 days.

OPX is proven to increase productivity and utilisation; reduce costs; improve cycle times and enhance customer experience.

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## MORE INFORMATION

For more information about OPX, please visit our website [corporatemodelling.com](http://corporatemodelling.com)

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