

# Alvaria Workforce™

**To compete in the marketplace, it's imperative to have a plan to deploy the right staff, at the right time, for the right customer. Alvaria Workforce is an easy-to-use forecasting, planning, scheduling, employee self-service and real-time management tool that ensures every employee and supervisor is productive, engaged and delivering an exceptional customer experience at the lowest cost.**

**As the world leader in workforce management, Alvaria ensures you have the right agents, with the right skills, available at the right time and helps plan and manage the performance of inbound, outbound and blended staffing resources across all customer channels. Alvaria Workforce can be extended beyond the contact center to manage enterprise experts and back-office personnel that can be combined with front office agents to get the most from your total workforce. The software's core forecasting, scheduling and tracking capabilities allow organizations to accurately project future staffing requirements to support customer demand and back-office task completion, create efficient single and multi-skill staffing plans, evaluate schedule efficiency, monitor staff performance and adjust resources to meet changing demand in real-time.**

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## KEY DIFFERENTIATORS FOR ALVARIA

### Modern, Graphical User Interface

Highly simplified, web-based, graphical user interface with same look and feel as other workforce engagement management (WEM) components significantly increases agent and supervisor productivity even for complex schedule trades or sequential shift bids.

### Multichannel Performance

Optimally blend staff across all channels including inbound/outbound voice, email, webchat, SMS, IM and social media.

### Multi-Skill Back Office Support

Apply workforce management best practices to the back office and blend back-office labor with front office labor.

### Forecasting Accuracy

Unparalleled forecasting accuracy with multiple forecasting algorithms, variable historical pattern weights and accurate intraday shrinkage.

### Business Planning

Explore the effect of disruptions and constraints in demand and resources with unlimited "what-if" scenarios. Perform analysis with drill down and roll up capabilities in user customizable views of key business information including agent productivity, intraday performance data, staff shrinkage and superstate analysis.

### Deployment Flexibility

Choose the options that fit your business needs and operational environment; deploy on-premises, privately hosted or in the public cloud as a stand-alone solution or integral part of the Alvaria WEM™ Solution.

### Schedule Optimization

Optimize schedules based on business need (requirements based), employee preference (preference based) or a mix.

### Schedule Validation

Create and test limitless trial schedules that optimize business needs and resources before making the best schedule official.

### Real-Time Adherence Monitoring

Real-time views that automatically surface non-compliance in even the largest contact center environments available in Web UI.

### 64 Bit Architecture

Take advantage of the power inherent in 64-bit hardware/software platforms.

### Employee Self-Service Empowers Agents

Browser-based self-service scheduling with new trade and request rules provides scheduling flexibility and minimizes administrative overhead.

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## KEY COMPONENTS

### WEM User Interface

Alvaria Workforce™ integrates seamlessly with the other recent versions of Alvaria WEM. Agents work from a single graphical user interface for all components of Alvaria WEM, which sports a modern, uniform, look and feel like the interfaces being used by Apple iOS, Google Android and Microsoft Windows. This responsive web design supports all popular browsers including Internet Explorer, Safari, Firefox and Chrome and adapts to multiple display devices including PCs, laptops, tablets and smartphones of varying sizes. Unlike some other workforce management providers in the market, no browser plug-ins are necessary to achieve full functionality.

With this user-focused design, Alvaria has been able to remove any technology barrier between the agent and the complexities of workforce management. With easy-to-understand graphical icons, widgets, dashboards and screen layouts, agents can understand key performance details at a glance. Streamlined navigation including search, using partial text lookup and favorites, allows agents and managers to get to specific areas of the program more quickly and efficiently. In essence, agents can accomplish their tasks with fewer clicks and in less time than has ever been possible before.

### Back Office Management

The Back Office Performance Module makes WFM as useful in the back-office as it is in the front-office. Traditional front-office workforce management systems cannot be used effectively in the back-office because, unlike the front-office, the back-office typically requires execution of several parallel tasks with backlog accumulation at each step. Further, the employees staffing the back office usually can perform multiple tasks, so staffing projections for these multi-skilled employees is more complex than in a contact center. For example, a mortgage application back-office process would require application review, credit checks, asset verification, retrieving copies of pay stubs and tax returns, scheduling an appraisal, scheduling the title search, underwriting, and scheduling closing. The Back Office Performance Module allows traditional workforce management capabilities of forecasting work, scheduling employees and tracking actual staffing to be applied in the back-office environment.

### Multichannel Performance

Multichannel Performance is a standard component of core WFM, but it is unique in the marketplace. In a world that is rapidly adopting digital channels for customer care, this important, patented, new feature gives the workforce management staff the ability to optimally blend staff across all channels including inbound/outbound voice, email and multi-skill multi-conversation webchat, SMS, IM and social media direct messaging. At present, non-voice agents are likely being scheduled in dedicated time slots without the ability to predict demand for staff other than by trial-and-

error. This new capability enables enterprises to accurately project staff to meet entirely new service and quality goals applicable to text-based channels.

### Strategic Planning and Forecasting

Evaluate multiple staffing scenarios to determine optimal resource deployment based on projected demand and resource pool characteristics for both short-term and long-term planning. Take all pertinent data into account including historical contact volumes, seasonal patterns, campaign completion rates and holiday variations. Using an exponentially weighted moving average tailored to each forecast group, the forecasting model merges historical data with current data providing the most accurate forecasts possible. Contact center planners can:

- Quickly evaluate trade-offs between service quality and staffing numbers
- Determine the impact of scheduling training, meetings and other off-phone activities on service and campaign goals
- Understand impact of service quality goals and demand patterns on budget

### “What-if” Analysis

Test multiple demand and staffing models and plan for unexpected events such as staff absences, a surge in demand from one or more channels, the effect of holidays or weather or other seasonal factors. Create multiple scenarios leveraging historical demand and staff patterns with the ability to adjust and include custom data that fits your business needs. Visualize the effect of your planning through trial schedules, allowing you to fully test the impact of decisions on your staff and service level goals. Be confident that your long-term, short-term and intraday staffing adjustments will have the right business impact.

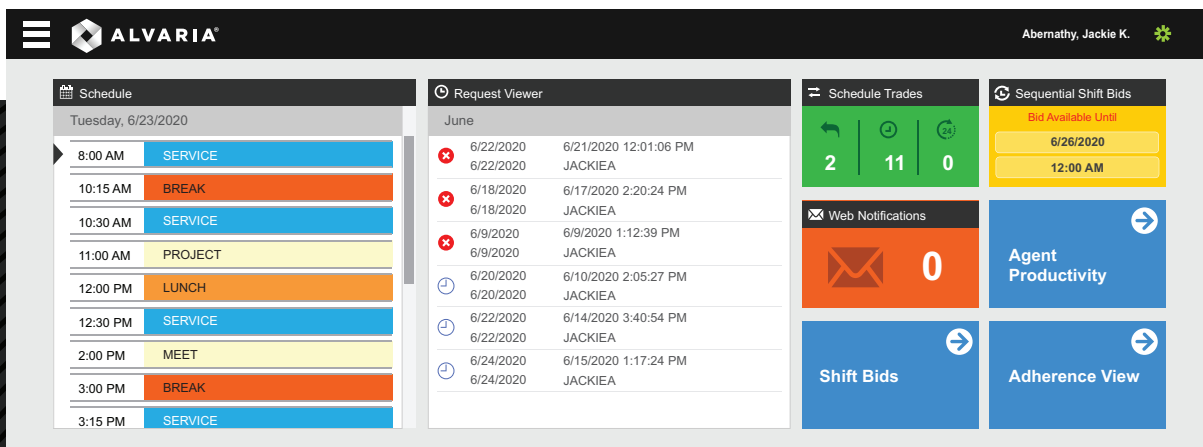
### Multi-Skill Support

Develop optimal forecasts for a blended environment and identify staffing requirements and optimal skill combinations based on agent skill and contact routing needs. For planners, it provides an accurate assessment of costs and benefits of skill-based routing models for your current and future resource pool.

### Flexible Scheduling

Create detailed employee schedules based on demand and resource availability, employee preferences, work and equity rules, union or other contractual schedule restrictions, or leverage a combined approach. Choose from a two-step process where multiple trial schedules are generated that optimize against all parameters and select the schedule that best fits your need.

Alternatively, use a one-step process based on employee preference and automatically assign employees as the schedule is generated. Create more accurate schedules by utilizing the modern web-based calendar to perform drag-and-drop editing, preview possible schedule changes before they go live and view daily, weekly and monthly schedules. Flexible Shift Bidding allows Gig Economy workers to build their own schedules, even when the schedules are comprised of non-traditional shifts.



The screenshot displays the Alvaria WEM Dashboard interface. At the top, the Alvaria logo is on the left, and the user name 'Abermathy, Jackie K.' is on the right. The dashboard is divided into several sections:

- Schedule:** A vertical timeline for Tuesday, 6/23/2020, showing shifts: 8:00 AM SERVICE, 10:15 AM BREAK, 10:30 AM SERVICE, 11:00 AM PROJECT, 12:00 PM LUNCH, 12:30 PM SERVICE, 2:00 PM MEET, 3:00 PM BREAK, and 3:15 PM SERVICE.
- Request Viewer:** A table listing requests for June.
 

Date	Time	Agent
6/22/2020	6/21/2020 12:01:06 PM	JACKIEA
6/18/2020	6/17/2020 2:20:24 PM	JACKIEA
6/9/2020	6/9/2020 1:12:39 PM	JACKIEA
6/20/2020	6/10/2020 2:05:27 PM	JACKIEA
6/22/2020	6/14/2020 3:40:54 PM	JACKIEA
6/24/2020	6/15/2020 1:17:24 PM	JACKIEA
- Schedule Trades:** A summary showing 2 trades, 11 requests, and 0 approvals.
- Sequential Shift Bids:** A section indicating 'Bid Available Until 6/26/2020 12:00 AM'.
- Web Notifications:** A section showing 0 notifications.
- Agent Productivity:** A button with a right arrow icon.
- Shift Bids:** A button with a right arrow icon.
- Adherence View:** A button with a right arrow icon.

Example WEM  
Dashboard with  
WFM Widgets

## Intraday Tracking

Display statistics about your contact center's performance across all channels while you still have time to make changes. Compare actual versus forecasted contact and staffing statistics for both inbound and outbound resources in 15 or 30-minute intervals to take the real-time corrective change to keep your staff on track. In the Web UI, use at a glance views of agents' schedules to determine what activities have been scheduled or how many agents are scheduled for a specific activity to easily identify utilization gaps and the resources available for assignments. Switch between viewing scheduled activities by agents and scheduled activities by activity type to answer questions about pay status, geolocation, staffing impact, adherence impact and more. Manage with more accurate intraday staffing level predictions, considering the amount of staff shrinkage likely to occur beyond what is already represented in schedules. Receive real-time alarms in the new Web UI when agents are not adhering to official schedule, then use the history of alarms for detailed analysis and reporting to surface underlying trends. Give agents the ability to self-correct with a graphical display of assigned schedule and actual activity throughout the day.

## Workforce Analytics

Benefit from centralized access to all employee-centered metrics captured within workforce management such as group assignment, schedule preference, skills, seat reservations and more. Includes the ability to extend the view with additional performance and quality metrics from the full Alvaria WEM™ solution. Create custom reports that zero-in on employees and schedules to better understand your workforce environment. Target management decisions such as training and re-assignment based on your selection.

## Employee Self-Service

Give agents more scheduling flexibility while ensuring service level achievement for in-house, home-based or remote agents. Empower agents with powerful, web-based self-service and free supervisors from routine approvals and schedule exception management. Alvaria allows for schedule trades, sequential shift bidding between two or more agents, a schedule trades bulletin board, time-off requests, viewing and updating schedule preferences, vacation balance checking and more for the agent in an intuitive interface. Supervisors can view schedule information for a list of employees for a given time period and perform batch scheduled edits. Preview the effect of a trade on agents' schedules and enable the supervisor to broker schedule trades. Requests can be prioritized based on business rules such as seniority, labor rules, performance, business needs or any combination of factors. Approvals can be routed to supervisors for manual inspection and approval. Use the Alvaria Workforce Mobile™ smartphone app or intelligent IVR to make remote agent access as simple and easy as possible. The Alvaria Workforce Mobile smartphone app mimics the look and feel of the desktop application.

Agent Flexible Shift Bidding Screen

ALVARIA

Abernathy, Jackie K.

FLEXIBLE SHIFT BIDS DETAILS

(UTC-06:00) Central Time (US & Canada)

12/2/2018 - 12/8/2018

Flexible Shift Bid:

Week 49, 2018 Combo (Service an...

Available Until:

12/2/2018 1:00 AM

Retrieved:

11/29/2018 4:21 PM

	Sunday, December 2, 2018	Monday, December 3, 2018	Tuesday, December 4, 2018	Wednesday, December 5, 2018	Thursday, December 6, 2018	Friday, December 7, 2018	Saturday, December 8, 2018
8:00 AM	Service Calls, Normal Shift	Email, Normal Shift	Service Calls	Email, Normal Shift	Service Calls	Email, Normal Shift	Service Calls, Normal Shift
9:00 AM	Service Calls, Normal Shift	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls, Normal Shift
	Service Calls, Normal Shift	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls, Normal Shift
10:00 AM	Service Calls, Normal Shift	Email, Normal Shift	Service Calls	Email, Normal Shift	Service Calls	Email, Normal Shift	Service Calls, Normal Shift
11:00 AM	Service Calls, Normal Shift	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls, Normal Shift
	Service Calls, Normal Shift	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls, Normal Shift
12:00 PM	Service Calls, Normal Shift	Email, Normal Shift	Service Calls	Email, Normal Shift	Service Calls	Email, Normal Shift	Service Calls, Normal Shift
1:00 PM	Service Calls, Normal Shift	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls, Normal Shift
	Service Calls, Normal Shift	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls, Normal Shift
2:00 PM	Service Calls, Normal Shift	Email, Normal Shift	Service Calls	Email, Normal Shift	Service Calls	Email, Normal Shift	Service Calls, Normal Shift
	Service Calls, Normal Shift	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls	Service Calls, Normal Shift



## Integrated Performance Management

Utilize KPI-based reporting on the full breadth and depth of workforce metrics such as schedule adherence, shrinkage, service level and more with over 150 pre-packaged reports. This includes the ability to source additional relevant data from enterprise systems and to create alerts and trigger workflows based on KPI thresholds.

## Backed by Unified Communication

Ensure that all users have an easy way to gauge availability and connect to their peers, managers and other enterprise resources through email or IM using tight integration with unified communications (such as locally installed email or instant message clients).

## Seamless Enterprise Fit

Enjoy full integration to Aspect® Unified IP® and support for integration with third-party interaction management environments including Avaya, Cisco, Five9, NICE-inContact, Zendesk, Twilio Flex, Amazon Connect and others. It fully leverages your enterprise technology investments for account administration (Windows domain-based authentication or claims-based authentication), data security (SSL), and work calendar (Microsoft Outlook). Alvaria Workforce™ can be leveraged as a stand-alone application or as part of Alvaria WEM™, a comprehensive and fully integrated solution that synthesizes analytics, performance management, quality management and interaction recording. It can be deployed on-premises, privately hosted or in the public cloud.

## Deployment Flexibility

Select from a variety of optional modules to create a workforce management environment that fits your business need – on-premises, privately hosted or in the public cloud:

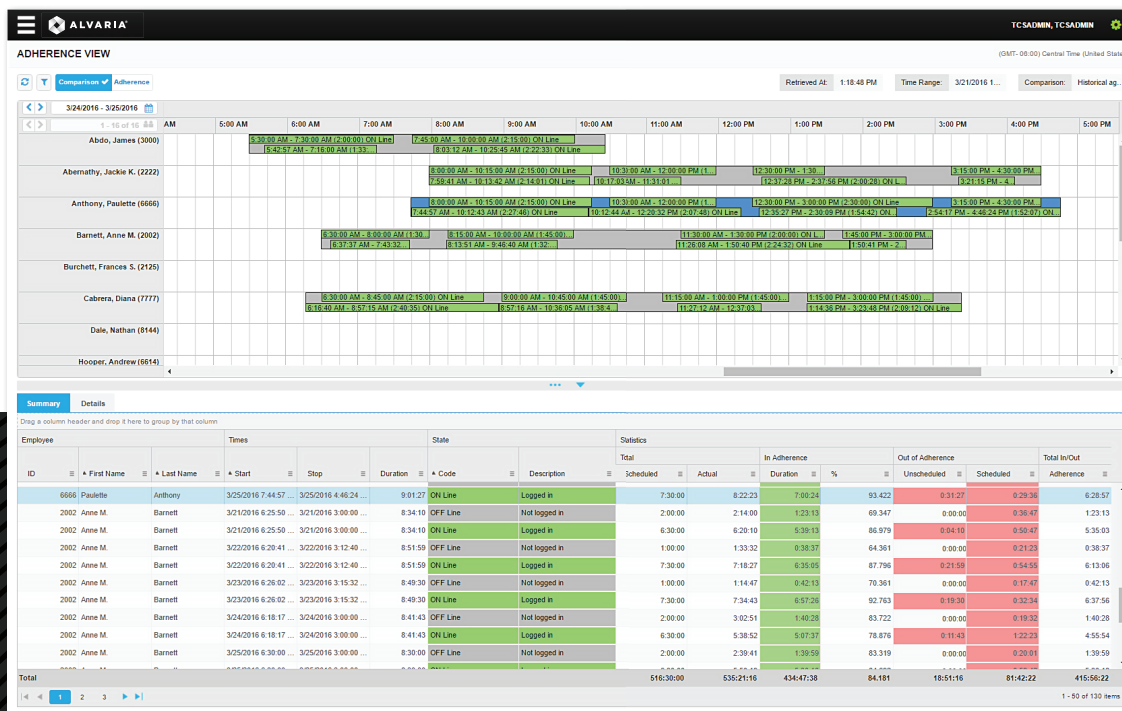
**Empower:** Utilize web-based self-service for agent schedules, change requests, trades, shift-bidding and more

**Perform:** Provide agent productivity and adherence insights in real time, intraday, daily and historical detail

**Allocate:** Utilize advanced capabilities for managing multiple locations as a single operational environment

**Reserve:** Manage agent seats based on real-time schedules and agent characteristics

**Encompass:** Facilitates exchange of workforce management data between in-house and outsourced environments



Example  
Adherence View in  
Web UI

# WORKFORCE MANAGEMENT

## Enables You To:

- Staff the right number and type of people at the right time to improve sales-per-hour ratios, dollars collected, customer retention and many other important KPIs
- Improve productivity in the back office with savings typically ranging from 20 – 40%
- Optimally staff agents for all contact center channels
- Evaluate multiple staffing scenarios with powerful strategic “what-if” analysis
- Utilize unique multi-skill forecasting and scheduling to determine optimal skill combinations
- Create schedules based on employee preferences, shift templates, work/equity rules or a combination
- Make accurate intraday adjustments to improve list penetration and effectiveness rates
- Optimize meetings, training and other off-phone activities
- Maximize occupancy and minimize over and under resource utilization
- Cut staffing costs while maintaining or even improving response times
- Reduce the complexity in your contact center with an integrated, total solution
- Easily integrate third-party software with WFM using a rich set of APIs

## Key Features

- Intuitive, modern, icon and widget-based user interface is very easy to learn and use to ensure the highest workforce productivity
- Modern web-based calendar for drag-and-drop editing, previewing possible schedule changes before they go live and viewing daily, weekly and monthly schedules
- Intraday, short-term, medium-term and long-term business planning with limitless “what-if” scenarios
- Sophisticated forecasting algorithms that leverage full breadth of historical and intraday shrinkage data and support multiple business objectives
- Forecasting, planning and scheduling for a multi-skill workforce in a multichannel environment
- Accurate forecasting across all inbound, outbound, digital, blended, chat, email and back-office staffing resources
- Scheduling based on business requirements, employee preference or both
- Centralized visibility into employee characteristics, preferences, schedules and performance
- Real-time intraday performance and agent adherence tracking
- Store, analyze and report on real-time alarms generated by rules that are easily and centrally configured
- Browser-based agent self-service including schedule trades, sequential shift bidding and schedule trades bulletin board
- Agent performance scorecards and workforce intelligence
- Simplified management of workforces across multiple sites and outsourced locations
- Automated seat planning and assignment tools
- Compatible with virtually any interaction management/ACD environment
- Available in English, French, German, Spanish, Portuguese, Chinese (Simplified), Chinese (Traditional), Japanese, Russian and Korean
- Compatible with Microsoft Office 365

### About Alvaria™

Alvaria helps organizations efficiently manage and engage the modern workforce and connect compliantly with customers and prospects. Our open, innovative multi-platform is purpose built for two core competencies; a feature-rich, intuitive, and intelligent workforce engagement management platform, and a multichannel proactive compliant outreach platform. Alvaria, the product of the merger of world leaders - Aspect Software and Noble Systems - is proudly celebrating 50 years in business reshaping customer and employee experience. ALVARIA. Reshaping Customer Experience™.