

ABSTRACT



**2017 – 2018 Workforce Management
Product and Market Report**

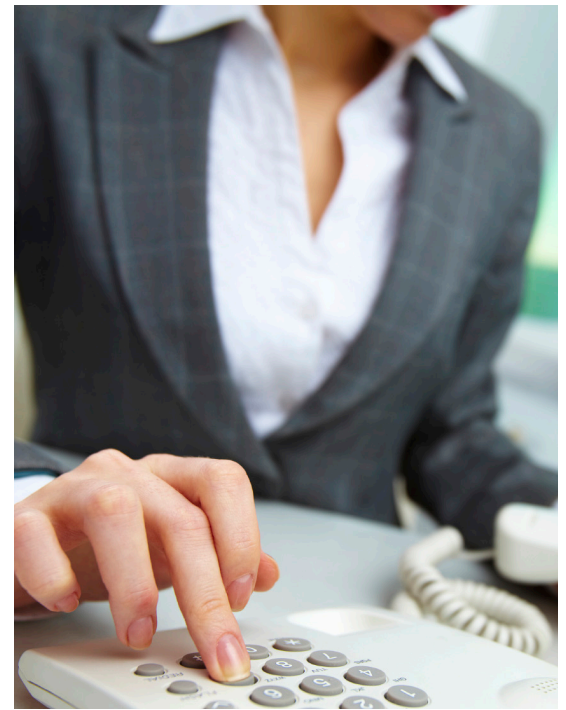
DMG

CONSULTING LLC



*DMG Consulting's 10th annual **Workforce Management Product and Market Report** provides the most detailed coverage and incisive analysis of this technology sector. The 406-page Report contains comprehensive vendor, product, trend, price and market data to help contact center, back-office and IT leaders select the right WFM solution for their organization. It also provides guidance for achieving a successful implementation and a rapid ROI.*

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The workforce management (WFM) market is ready for a major transformation. Two inter-connected trends are driving vendor investment and prospects' interest in WFM solutions. Enterprises are looking for flexible and accurate WFM solutions to help them cost effectively deliver a personalized experience to each and every customer. This is an essential goal in a market dominated by Millennials, who expect the companies that they do business with to have a thorough knowledge of their interaction history and be familiar with their wants and needs. At the same time, companies are seeking solutions to address their enterprise-wide requirements, including the needs of their back offices and branches. WFM vendors are starting to invest in new technology and approaches, including intraday management and next-gen WFM capabilities, to deliver on these high-priority objectives.

Intraday management, which has been an area of weakness in many contact center solutions, is finally being addressed by emerging solution providers. When unforeseen events – major weather disruptions, operating errors, or a highly contagious virus in the contact center – impact staffing or transaction volumes, WFM administrators have to figure out how to re-forecast and change schedules on-the-fly. Companies need flexible, easy-to-use and precise WFM solutions that can proactively identify staffing issues and, importantly, provide real-time guidance to managers on how to address them.

DMG has introduced the concept of NewGen WFM, supported by adaptive real-time scheduling, a new approach to intraday management. To address unanticipated changes in demand and staffing, these WFM modules must be able to identify out-of-adherence situations, re-forecast schedules, determine the skills and people required to address the new projections, and bring in properly skilled employees. NewGen WFM solutions must be supported with faster processing capabilities, which the cloud enables, and integration to operating systems that can provide the intelligence to route interactions to appropriate resources.

NewGen WFM is a win for enterprises, contact center staff and the company's customers. Employees, particularly Millennials, are freed from the traditional WFM limitations of rigid

schedules and compensation. These solutions are designed to address fairness at all levels to engage employees and provide them with more choice and flexibility to address their scheduling needs. As the goal of these new real-time scheduling modules is to make sure that the company has the right resources at all times to meet their service level commitments, customers benefit from an improved experience and greater engagement at every step of their journey. The combined benefits from more satisfied employees and customers will help to improve a company's performance and bottom line.

DMG anticipates that the WFM sector will continue to grow at a strong rate for a mature market. The number of WFM seats is expected to grow by 8% in 2017 and 2018, and by 9% in 2019, 2020 and 2021. The growth rate could outperform these projections if the vendors become more effective at communicating their value to buyers outside of contact centers, such as back-office and retail/branch environments. Additionally, the contact center market is in the midst of a major refresh cycle, and many companies that are replacing their ACDs may also look to replace their WFM solutions.

The *2017 – 2018 Workforce Management Product and Market Report* provides an in-depth analysis of the contact center WFM market, the competitive landscape, product suites, technology and innovation. It analyzes the service and business trends that are redefining staffing paradigms, management practices, and how enterprises and their contact centers view and interact with their customers, prospects and employees. The Report examines WFM market activity and provides 5-year market projections. It also explores back-office and branch WFM market opportunities and applications.

Eight leading and contending vendors are covered in the Report: ActiveOps, Aspect, Calabrio, Intradium, NICE, Teleopti, Verint and WorkFlex. ActiveOps, Intradium and WorkFlex, are covered at a high level, as each of these vendors provides a component of a total WFM solution; ActiveOps addresses the capacity needs of back offices, and Intradium and WorkFlex handle the intraday management challenge.

Key Elements of This Report

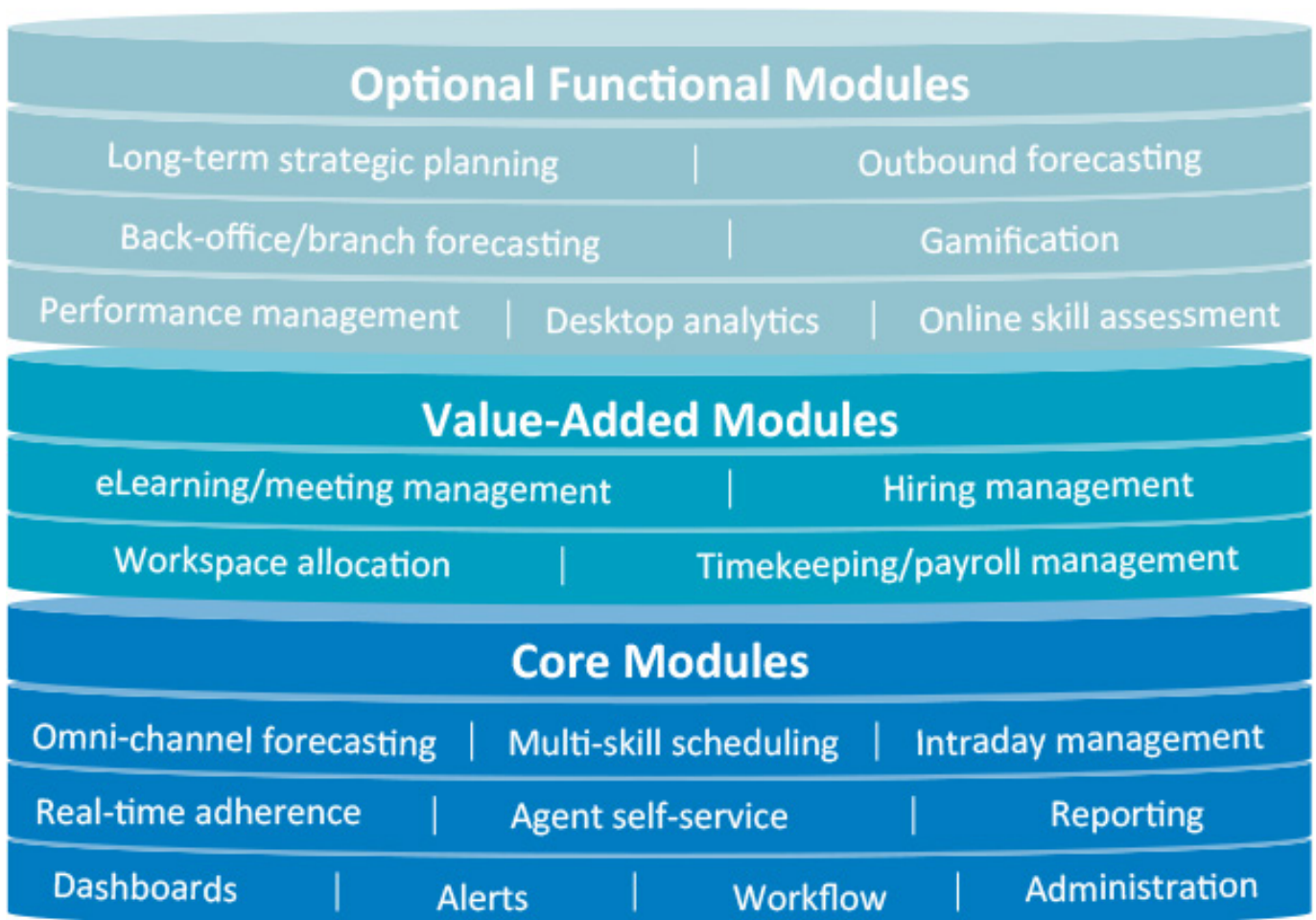
- ⇒ Overview of workforce management market segments and vendor-supported activities
- ⇒ Service deployment options for WFM solutions
- ⇒ Functional and technical building blocks of contact center WFM suites
- ⇒ Review of WFM fundamentals: forecasting, scheduling, intraday management, shrinkage, real-time adherence, long-term planning, and dashboards and reporting
- ⇒ High-level technical analysis, including security, integration capabilities and globalization features
- ⇒ Market and business trends and challenges that are driving enterprise investments and influencing the direction of vendor research and development (R&D)
- ⇒ WFM market innovation, including a review of recently introduced functionality and what is planned for the next 12 – 18 months
- ⇒ Analysis of the changing business, servicing and management requirements that are shaping NewGen WFM solutions
- ⇒ Discussion of how NewGen WFM and real-time adaptive scheduling will be used to re-imagine and re-engineer intraday management
- ⇒ Insightful look at how NewGen WFM can be leveraged to support new staffing paradigms that prioritize employee needs and preferences while at the same time building customer engagement and an improved customer experience
- ⇒ Analysis of the developing back-office and branch capabilities of the featured WFM suite providers
- ⇒ WFM market activity analysis, adoption rates and 5-year market growth projections
- ⇒ Review and assessment of the WFM competitive landscape
- ⇒ Overview of the 8 leading and contending WFM vendors, including company snapshots, WFM suites, packaged solutions and small and mid-size business (SMB) offerings
- ⇒ WFM benefits and return on investment (ROI) analysis
- ⇒ Implementation analysis, including vendor methodology, best practices, maintenance and support, workshops, training and professional services
- ⇒ Vendor pricing for 250-seat on-premise and cloud-based WFM implementations, including incremental costs for optional modules
- ⇒ Results of a wide-ranging customer satisfaction survey that measures and ranks ratings across 17 product components, 14 effectiveness categories, and 10 vendor categories
- ⇒ Detailed company reports for the 8 leading and contending WFM vendors, analyzing their products, functionality and future product development plans
- ⇒ Comprehensive WFM Vendor Directory

Report Highlights

- ***NewGen WFM solutions are revolutionizing and reinvigorating the WFM market:*** Vendors are starting to invest in new solutions supported by adaptive real-time scheduling, which enables an unprecedented degree of forecasting flexibility for enterprises and agents. These new WFM modules allow companies to address unforeseen events, and provide managers with real-time guidance to address out-of-adherence situations that arise during the day. Customers benefit from the solutions' ability to provide appropriate resource allocation to address service levels at all times.
- ***WFM solutions address the needs of Millennial workers and consumers:*** The Millennial generation expects a work/life balance at their job, and a customized service experience at the consumer end. The new generation of WFM solutions addresses these ever-growing expectations by providing employees with flexible schedules and greater scheduling autonomy. This results in improved staff satisfaction and engagement, which translates into better service for consumers.
- ***The WFM sector is performing well and growing at a strong rate for a mature market:*** The number of WFM seats grew by 8.8% between 2015 and 2016, with some of the growth occurring in seats outside of the contact center — back offices and branches. This presents a great opportunity for WFM, and the vendors should continue to target this sector. The overall WFM market is expected to continue to grow by 8% in 2017 and 2018, and by 9% in 2019, 2020 and 2021.



WFM Functional Building Blocks



Source: DMG Consulting LLC, March 2017

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