



Abstract

2021–2022 Workforce Management Product and Market Report

DMG Consulting's **2021-2022 Workforce Management Product and Market Report**, our 14th annual edition, presents an in-depth analysis of the contact center workforce management (WFM) market, the competitive landscape, vendors, product suites, technology and innovation. The Report examines the business, market and technology trends and challenges confronting contact centers in the wake of the COVID-19 pandemic. It explores the technology and applications of new-gen WFM, which is an essential part of the transformation taking place in contact centers. The Report analyzes WFM market activity and provides 5-year projections. It also presents customer satisfaction survey results that rate the vendors and their products. The Report is intended to help contact centers, back offices and branches, IT and enterprise leaders in companies of all sizes select the right technology, functionality and partner to meet their current and future needs.





The workforce management market has attracted more investments and research and development (R&D) dollars in 2020 than ever before. The contact center WFM market has been moving toward digital transformation for the past few years, but the pandemic galvanized the modernization of these product suites to address the increasingly digital and self-service needs of today's consumers.

Workforce management solutions are among the most important productivity tools in contact centers. Now, they are increasingly important tools for improving the customer experience and employee engagement. These solutions enable companies to provide optimal service by forecasting the volume of incoming traffic in multiple media, determining staffing needs, and then scheduling employees with the right skills to handle the projected workload. The migration of workers to home offices has complicated the scheduling challenge and created new issues for contact center management. The more advanced WFM solutions have been instrumental in helping contact center supervisors and managers

monitor their staff, regardless of where they are located, and keep them engaged. Among the most important tools for this purpose in WFM suites are real-time adherence, intraday management, mobility, self-service, gamification and bi-directional communications.

Cloud-based solutions have been invaluable for addressing pandemic-related challenges by giving WFM administrators and supervisors uninterrupted access to their systems and applications. The cloud eliminates geographical limitations, making it possible to manage employees' performance regardless of where they are based and allow supervisors to communicate with agents continuously to keep tabs on their well-being and notify them of schedule changes. The pandemic has also created new challenges for agents working at home, shifting their work/life balance in often unexpected ways.

New-gen WFM solutions have been instrumental in addressing the work-at-home (WAH) staffing challenge, supporting flex scheduling, agent self-service, mobility, and virtual hiring and onboarding of new agents. Real-time adherence (RTA) solutions provide transparency for supervisors to monitor what agents are doing throughout the



workday, a unique level of visibility that is lacking in most other operating departments. Now that WAH is a proven staffing model, agents are demanding greater flexibility in scheduling their hours. Agent self-service capabilities, including virtual assistants that improve these solutions' ease of use, are instrumental in empowering workers to balance their personal and professional responsibilities.

The WFM market is expected to continue to grow rapidly during the next few years. The cloud has made it possible for contact centers of all sizes, including those with as few as 10 seats, to deploy these solutions. The cloud has also eliminated many of the obstacles to implementing and upgrading WFM solutions, which are often highly complex. Another driver of WFM market growth is the adoption of cloud-based contact center infrastructure (CBCCI) solutions. Some of the CBCCI vendors are building WFM solutions of their own to allow customers to have a single administration environment for their contact center infrastructure environment, eliminating the need for integrations with third-party solutions. The cloud allows vendors to introduce new functionality gradually, and users benefit from immediate access to new technology as it comes

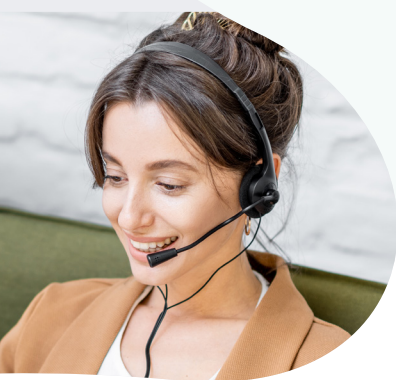
to market. As a result of the cloud, contact centers have new choices, and increased competition is pushing the vendors to enhance their offerings in order to keep pace with the market.

Once the pandemic eases worldwide, businesses will be confronted with the challenge of bringing some or all of their staff back into the office. This will be another driver of WFM growth, as these solutions will be a critical part of the process. Contact centers will use WFM to build schedules that minimize service disruptions, and innovative WFM vendors will develop features that allow employees to work together safely on-site. The specialized forecasting, scheduling and oversight capabilities of WFM solutions give contact centers a major advantage over other departments that lack these tools.

The 2021-2022 Workforce Management Product and Market Report features 5 WFM vendors: Aspect, Calabrio, NICE, Puzzel and Verint. It also provides a high-level overview of four new competitors in the WFM arena, Authority Software, Eleveo, Playvox and Salesforce.

Report Highlights

- **The COVID-19 pandemic has accelerated innovation in the WFM market:** The WFM market has been advancing slowly toward digital transformation in the last couple of years. The pandemic has caused enterprise and contact center executives to recognize the need to speed up the overhaul of their service environments along with their agent onboarding, scheduling and oversight capabilities.
- **Workforce management is uniquely suited to address the WAH workforce:** The pandemic has proven that contact centers can function well with employees working at home, and WFM solutions provide functionality that addresses the unique needs of this staffing model. Features such as RTA, intraday management, agent self-service and bi-directional communication allow supervisors to monitor their agents regardless of their location, and agents benefit from enhanced schedule flexibility and engagement.
- **The cloud has enabled contact centers to perform well in challenging times:** The cloud was instrumental in helping contact centers move their employees to their homes when the pandemic forced them out of the office. Cloud-based systems allowed supervisors to monitor their staff regardless of location, and agents to communicate their availability and submit schedule change requests from any location, via their mobile devices.
- **The WFM market is expected to experience rapid growth:** The cloud is the primary driver of increasing growth and demand for WFM, as it enables companies to implement and upgrade WFM solutions more easily. Adoption of CBCCI solutions is also contributing to the growth of WFM; CBCCI vendors are developing their own WFM capabilities to address customers' demands for a single administration environment for all of their core functionality, eliminating the need for costly and complex integrations with third-party solutions.
- **Just as WFM solutions helped companies adapt at the advent of the pandemic, they will also help companies emerge from the health crisis:** Companies that had WFM solutions in place had an easier time migrating their workforce to work at home. Once the pandemic eases, WFM will again play an instrumental role, helping companies forecast, schedule and oversee employees as they return to the office.



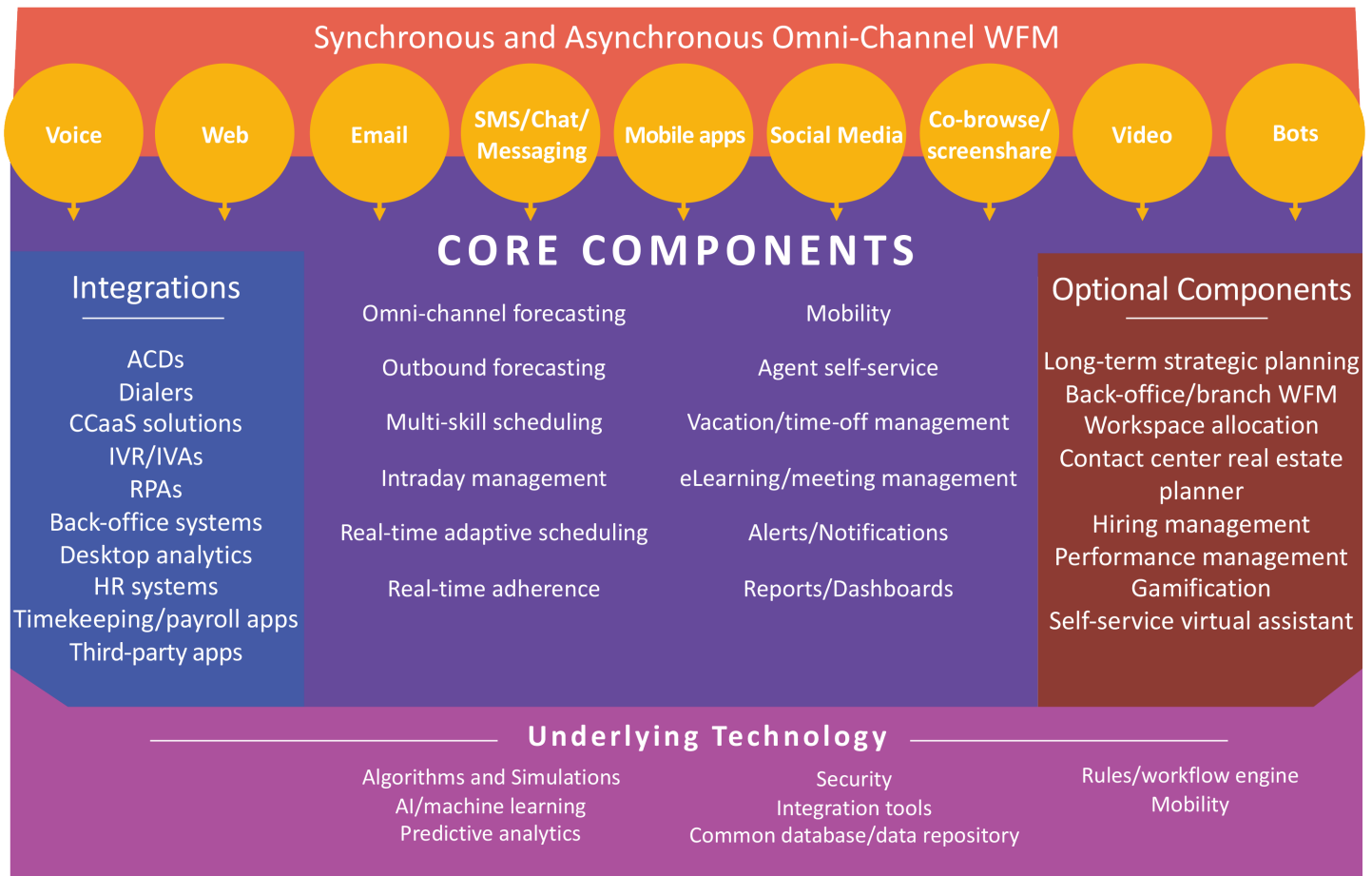
Key Reasons to Buy This Report

- ▶ Overview of the functional components that comprise a WFM solution, including core and optional modules offered in the 5 featured WFM suites, as well as small and mid-size business (SMB)/package solutions
- ▶ Market, business and technology trends and challenges that are driving enterprise investments and influencing product development
- ▶ WFM market innovation, including a review of recently introduced features and functionality and what is planned for the next 12 –18 months
- ▶ Insightful exploration of New Gen WFM, highlighting the features, functionality and capabilities that make it a requirement for contact centers today and fortify its positioning as the future of WFM
- ▶ Examination of WFM vendor opportunities precipitated by the COVID pandemic
- ▶ In-depth analysis of WFM modules that facilitate engagement, empowerment and management of work-at-home (WAH) agents and remote staff
- ▶ Review of the long-term planning capabilities, including hiring management and workspace allocation capabilities, that will be instrumental in hiring and onboarding WAH/remote staff and facilitating the safe return to the office
- ▶ WFM market activity analysis, adoption rates and 5-year market growth projections
- ▶ Review and assessment of the WFM competitive landscape, including an overview of 4 new contenders in the WFM sector
- ▶ WFM high-level functional summary, including user interfaces, security features and reporting and dashboards.
- ▶ Implementation analysis, including implementation and return on investment (ROI) time frames, best practices, training and workshop offerings
- ▶ Vendor pricing for a 250-seat on-premise and cloud-based voice-only and a voice and digital channel WFM implementation for core forecasting and scheduling plus incremental costs (if applicable) for intraday management, real-time adherence, agent self-service, vacation/time-off management, eLearning/meeting management, timekeeping/payroll management, long-term strategic planning, hiring management, workspace allocation, gamification, mobility, back-office and branch WFM
- ▶ Comprehensive customer satisfaction survey results that measure and rank ratings across 10 product capabilities and 11 vendor categories
- ▶ Detailed company reports for the 5 leading and contending WFM vendors, analyzing their products, functionality and future product development plans
- ▶ Comprehensive WFM Vendor Directory



Sample Figure:

Enterprise WFM Suite



Source: DMG Consulting LLC, March 2021

1. Executive Summary
2. Introduction
3. DMG Consulting Research Methodology
 - 3.1 Report Participation Criteria
4. Workforce Management Defined
 - 4.1 WFM Vendor Suite Overview
 - 4.2 Vendor SMB/Packaged WFM Solutions
5. Workforce Management Trends and Challenges
 - 5.1 Workforce Management Trends
 - 5.2 Workforce Management Challenges
6. Workforce Management Market Innovation
 - 6.1 New Product Features
 - 6.2 Future Enhancements
7. New-Gen WFM is the Future
 - 7.1 Omni-Channel is a Requirement for Delivering a Great Customer Experience
 - 7.1.1 The Growing Importance of Providing Digital Channel Support
 - 7.1.2 Omni-Channel WFM Requirements
 - 7.2 Real-Time Adaptive Scheduling
 - 7.3 Artificial Intelligence, Machine Learning and Automation
8. WFM Opportunities Driven by the Pandemic
9. WFM Keeps WAH and Remote Staff Engaged and in Touch
 - 9.1 Agent Self-Service
 - 9.2 Mobility Features
 - 9.3 Intraday Management
 - 9.4 Real-Time Adherence
 - 9.5 Gamification
 - 9.6 eLearning/Meeting Management
 - 9.7 Vacation/Time-Off Management
 - 9.8 Timekeeping/Payroll Management
10. Looking Ahead: Planning for the New Normal
 - 10.1 Long-Term Strategic Planning
 - 10.2 Hiring Management
 - 10.3 Workspace Allocation Module
11. Consolidating Front and Back-Office Operations
 - 11.1 Functional Capabilities of Back-Office/Branch WFM Solutions
12. Workforce Management Market Activity Analysis
 - 12.1 Validating Market Numbers
 - 12.2 WFM Market Share Analysis
13. WFM Adoption Rate
14. WFM Market Projections

- 15. WFM Competitive Landscape
 - 15.1 Vendors to Watch
 - 15.2 Company Snapshot
- 16. High-Level Functional Summary
 - 16.1 User Interfaces
 - 16.2 Security
 - 16.3 Dashboards, Reporting and Analytics
- 17. WFM Implementation Analysis
- 18. WFM Vendor Satisfaction Analysis
 - 18.1 Summary of Survey Findings and Analysis: Vendor Categories
 - 18.1.1 Vendor Satisfaction by Category and Customer
 - 18.2 Summary of Survey Findings and Analysis: Product Capabilities
 - 18.2.1 Product Capabilities Satisfaction by Category and Customer
 - 18.3 Customer Background and Insights
 - 18.3.1 Channels Supported
 - 18.3.2 Top 3 - 5 Ways the WFM Solution Helped Address Pandemic-Related Challenges
 - 18.3.3 Top 3 - 5 WFM Challenges
 - 18.3.4 Additional Comments
- 19. Pricing
 - 19.1 Premise-Based Voice-Only WFM Solution Pricing
 - 19.2 Premise-Based Voice and Digital Channel WFM Solution Pricing
 - 19.3 Cloud-Based Voice-Only WFM Solution Pricing
 - 19.4 Cloud-Based Voice and Digital Channel WFM Solution Pricing
- 20. Company Reports
 - 20.1 Aspect Software, Inc.
 - 20.2 Calabrio, Inc.
 - 20.3 NICE
 - 20.4 Puzzel Ltd.
 - 20.5 Verint Systems
- Appendix: WFM Vendor Directory

Figure 1:	Enterprise WFM Suite Components
Figure 2:	High-Level WFM Suite Components
Figure 3:	Packaged/SMB WFM Solutions
Figure 4:	2021 Workforce Management Trends
Figure 5:	2021 Workforce Management Challenges
Figure 6:	New Product Features, by Vendor
Figure 7:	Future Enhancements, by Category
Figure 8:	Customer Expectations for CX in the Post-COVID-19 World
Figure 9:	Omni-Channel Capabilities
Figure 10:	Real-Time Adaptive Scheduling and Intraday Management
Figure 11:	Real-Time Adaptive Scheduling
Figure 12:	Artificial Intelligence (AI), Machine Learning and Automation
Figure 13:	Contact Center Real Estate Planner
Figure 14:	Pandemic-Driven WFM Opportunities
Figure 15:	Agent Self-Service
Figure 16:	Mobility
Figure 17:	Real-Time Intraday Management
Figure 18:	Intraday Management
Figure 19:	Real-Time Adherence
Figure 20:	Gamification
Figure 21:	eLearning/Meeting Management
Figure 22:	Vacation/Time-Off Management
Figure 23:	Timekeeping/Payroll Management
Figure 24:	Changing Business Models
Figure 25:	Long-Term Strategic Planning
Figure 26:	Hiring Management
Figure 27:	Workspace Allocation
Figure 28:	Benefits of Front- and Back-Office Consolidation
Figure 29:	Back Office/Branch
Figure 30:	WFM Market Activity, as of December 31, 2020
Figure 31:	WFM Market Share by Number of Seats, as of December 31, 2020
Figure 32:	WFM Market Share by Number of Seats, as of December 31, 2020
Figure 33:	Total Number of WFM Seats and Customers, 2020 vs. 2019 Comparison
Figure 34:	Total Number of WFM Seats, 2011 – 2020 Trends
Figure 35:	WFM Revenue Projections, 2021 – 2025
Figure 36:	Company Information
Figure 37:	High-Level Functional Summary
Figure 38:	User Interfaces
Figure 39:	Security
Figure 40:	Dashboards, Reporting and Analytics
Figure 41:	Implementation and ROI Time Frames

- Figure 42: Customer Survey Rating Categories
- Figure 43: Average Vendor Satisfaction Ratings, by Category
- Figure 44: Product Satisfaction Ratings, by Customer
- Figure 45: Implementation Satisfaction Ratings, by Customer
- Figure 46: Integration Satisfaction Ratings, by Customer
- Figure 47: Training Satisfaction Ratings, by Customer
- Figure 48: Professional Services Satisfaction Ratings, by Customer
- Figure 49: Ongoing Service and Support Satisfaction Ratings, by Customer
- Figure 50: Product Innovation Satisfaction Ratings, by Customer
- Figure 51: Responsiveness to Product Enhancement Requests Satisfaction Ratings, by Customer
- Figure 52: Vendor Communication Satisfaction Ratings, by Customer
- Figure 53: Pricing Satisfaction Ratings, by Customer
- Figure 54: Overall Vendor Satisfaction Ratings, by Customer
- Figure 55: Average Product Capabilities Satisfaction Ratings, by Category.
- Figure 56: Ability to Mitigate Pandemic-Related Impacts Satisfaction Ratings, by Customer
- Figure 57: Ability to Support the Unique Requirements of each Voice and Digital Channel Satisfaction Ratings, by Customer
- Figure 58: Ability to Accurately Forecast and Efficiently Schedule
Blended Omni-Channel and Multi-Skill Environments Satisfaction Ratings, by Customer
- Figure 59: Ability to Make Automated Intraday Staffing Adjustments based on Real-Time Conditions Satisfaction
Ratings, by Customer
- Figure 60: Ability to Monitor and Report on Real-Time Adherence for Agents that Dynamically Move Between Voice and
Digital Channels Satisfaction Ratings, by Customer
- Figure 61: Ability to Calculate and Apply Shrinkage Automatically Satisfaction Ratings, by Customer
- Figure 62: Ability to Provide Mobile Support for Agents and Supervisors Satisfaction Ratings, by Customer
- Figure 63: Ability to Streamline and Automate Administrative Processes Satisfaction Ratings, by Customer
- Figure 64: Ability to Support Back-Office/Branch WFM Satisfaction Ratings, by Customer
- Figure 65: Ability to Support Artificial Intelligence and Machine Learning Enablement Satisfaction Ratings, by Customer
- Figure 66: What channels do you use your WFM solution to support?
- Figure 67: What are the top 3 – 5 ways that your WFM solution helped you to address pandemic-related challenges?
- Figure 68: What are the top 3 – 5 challenges of your WFM solution?
- Figure 69: Additional comments about your experience with the vendor and/or product
- Figure 70: Pricing for a Single-Site 250-Seat Premise-Based Voice-Only Solution
- Figure 71: Pricing for a Single-Site 250-Seat Premise-Based Voice and Digital Channel Solution
- Figure 72: Pricing for a Single-Site, 250-Seat Contact Center; Cloud-Based Voice-Only Solution
- Figure 73: Pricing for a Single-Site, 250-Seat Contact Center; Cloud-Based Voice and Digital Channel Solution



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