



Anaplan for Workforce Capacity Planning in Contact Centers

Optimize your workforce capacity planning to reduce costs and deliver superior service

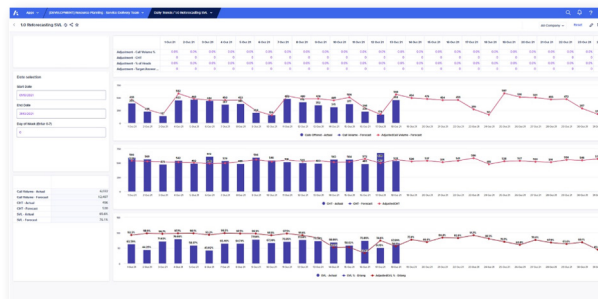


Are your contact centers overwhelmed by rising channel complexity, staff burnout, and growing pressure to reduce costs? Are you feeling the pressure to accelerate your deployment of AI? You're not alone. Manual planning, spreadsheet-based processes, and disconnected systems only make things worse for contact center and operations leaders. This leads to higher costs and inconsistent customer service.

To deliver superior service while keeping costs in check, you need a planning solution that seamlessly integrates with your existing tools and technologies. This will help you improve capacity planning and forecast accuracy, optimize staffing, and enable real-time collaboration across your business.

There is a better way to plan

With Anaplan, you can take the guesswork out of capacity and demand planning and align your contact center agents with incoming call volume to deliver first-class service in the most cost-effective manner. Optimize your staffing to handle business demand fluctuations and ensure consistent, high-quality service across your operations. Ditch the manual spreadsheets and boost collaboration across your business (e.g., finance, HR, operations, business units, sales, etc.).



Key benefits

- Reduce queues and wait times and improve staffing allocation by generating contact center forecasts across all channels (e.g., call, text, chat, email, etc.) and time horizons (e.g., intra-day, short-term, and long-term).
- Reduce costs and effectively balance agent capacity and skill levels by analyzing trends against transactional volumes over time.
- Better understand the impact of certain events on incoming volumes so you can minimize your over- and understaffing.
- Improve SLA and CSAT/net promoter score (NPS) through skills and capacity rightsizing. Model which cases and activities should be handled by which agents or teams to maximize efficiency and meet or exceed the 80/20 rule.

CUSTOMER STORY



Major UK Retail Bank

A major retail bank in the United Kingdom looked to Anaplan to optimize their call center fraud operations. They wanted to ensure they had the right people at the right times to take calls and support customers during their critical moment of distress.

Challenges:

- **Poor customer experience** due to inadequate contact center staffing focused on handling fraud
- **Increased errors and time wasted** due to heavy dependence on fragmented spreadsheets
- **Poor impact analysis and decision-making** across the wider bank business due to inability to bring together data from static, disparate sources

Results:

- **Increased call demand forecast accuracy by 2.7% after only two months**, creating significant operational efficiency gains
- **Higher NPS** due to optimization of their contact center staffing levels and reduction in failure demand
- **Reduced risk** by responding to calls quicker and shutting fraud instances down promptly, helping to avoid future losses

“Our overall forecast accuracy using Anaplan has improved from over 12% deviation to 5% and below, which is industry standard and best practice.”

– Customer experience lead, Major UK Retail Bank

Key features

Labor demand, supply, and gap analysis

- Assess demand against external factors (like weather or traffic) statistically to predict required staffing levels.
- Calculate labor capacity by integrating data from your workforce management system to determine your real utilization rate and inform scheduling and allocation.
- Optimize resource allocation by developing granular operating models (e.g., daily, event-based).
- Measure transactions and labor at the lowest level drivers (e.g., average hold time) and at small time intervals (seconds) to forecast capacity and skills.

Labor cost optimization

- Visualize the impact of under- and overstaffing.
- Assess coverage and gap across verticals, languages, and skills.
- Compare costs across teams by looking at cost and time per activity.

- Connect labor costs with production or service data to accurately determine the cost to service your customers.

Advanced “what-if” scenario modeling

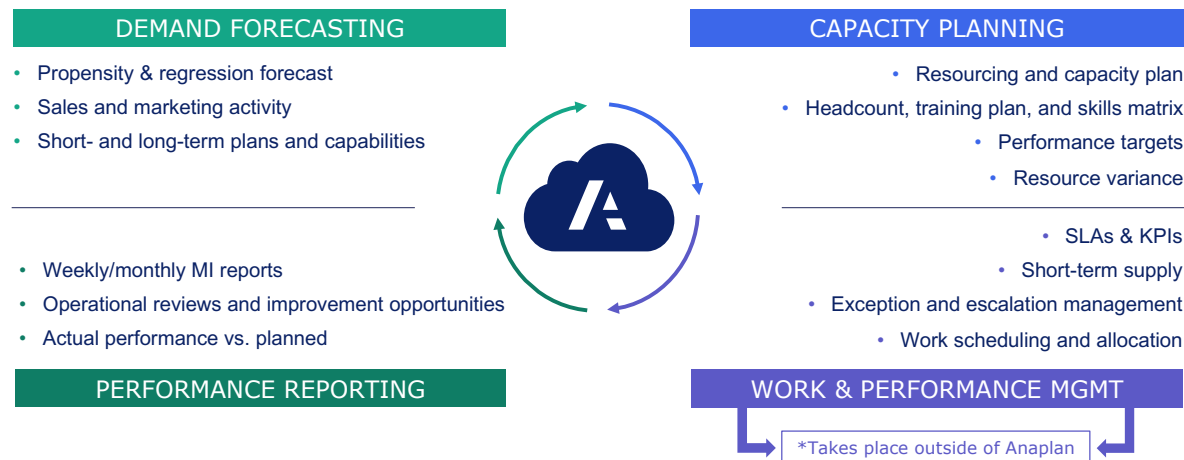
- Model and compare various scenarios (e.g., optimization of volume distributions based on cost or CSAT) and promptly see the impact on headcount, costs, and productivity KPIs.
- Easily run Erlang functions and determine staffing levels.
- Analyze the effect of changes, drivers, and assumptions to shape the best path forward.

External supply/BPO optimization

- Optimize your workforce with the ideal mix of employees and agency contractors.
- Compare BPO performance metrics (e.g., answer time, SLA, cost, CSAT) to better understand trade-offs on enhancing customer service and reducing costs.
- Model contingency plans based on changing business needs (e.g., a BPO closed due to a hurricane) and shift work to other BPOs to avoid service disruptions.

The Anaplan platform

- **Use advanced “what-if” scenario modeling**, powered by our patented Hyperblock™ calculation engine, to produce ultra-fast calculations at unprecedented scale.
- **Integrate seamlessly** with HCM/HR, Workforce Management (WFM), finance, operations, and other systems of record using prebuilt connectors or third-party ETL tools. Enrich your data with information from your data warehouse, third-party benchmark providers, and spreadsheets.
- **Manage organization-wide workforce data**, workforce plans, and hierarchies in a centralized data hub.
- **Leverage built-in dashboards, reporting, and analytics** with data visualization to provide a single source of truth on business performance.
- **Ensure best-in-class security**, with role-based access control, user management, SSO support with SAML 2.0 compliance, and data encryption.



About Anaplan

Anaplan transforms the way you see, plan, and lead your business. By dynamically connecting financial, strategic, and operational plans in real time, Anaplan gives you the power to anticipate change, address complexity, and move at market speed. Anaplan's Connected Planning platform lets you view and contextualize current performance, forecast future outcomes to fuel growth and mitigate risk, and optimize costs so you can make faster, more strategic decisions. Anaplan helps more than 2,400 market-leading customers in over 50 countries navigate their daily planning challenges with confidence.

To learn more, visit anaplan.com.

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