Dialing in success: closing healthcare contact center workforce gaps with modern capacity planning and forecasting

How connected workforce planning tools can help your contact center keep performance on track

Anaplan

In an era marked by rising costs, supply chain disruptions, staffing shortages, and accelerated digitization, patients are demanding a higher level of care and support. Examples of increased demands include personalized care, e.g., expecting a patient support representative to readily know of their previous interactions and treatment journey, and expectations for simplicity and choice of communication channels, allowing patients to seamlessly connect to access information or support, whether that's through self-service, bots, or live agents. Keeping this in perspective, the role of the contact center has become ever more pivotal to the resilience and success of healthcare organizations.

As the increased need for personalized and efficient patient support experience rises, research has shown that the global contact center market is projected to reach a value of

$496 billion

by 2027, a compound annual growth rate of

7.8% since 2022.

In today's heathcare contact centers, workforce management and operations leaders must focus on both real-time and long-term planning to anticipate changes in economic and market conditions, align workforce resources accordingly, and strategically prepare for various scenarios that can impact the business and its resiliency. Underlying this is the ability to assess the impact of digital channels on workforce management. As patients increase their use of digital channels to connect, this transition creates new challenges in terms of how you approach staffing. At the same time your organization navigates the seismic shift in patient demand, you are also challenged to manage operational costs. Embracing increased agility in your planning, identifying workforce demand and capacity, and preparing for future risks and road bumps can all help you deliver patient satisfaction while bolstering your cost savings.

This eBook will outline the benefits that are possible when your workforce capacity planning takes center stage. It will explore the problems that your contact centers face today and how you can solve them with modern workforce capacity planning solutions upstream to ensure your success in workforce management and scheduling. You'll learn how to improve your operations and overcome barriers that are holding you back.

Fueling efficiency and mitigating workforce risks

Healthcare contact centers face unique challenges: thousands of daily patient interactions that require more contact channel availability. At the same time, you may be dealing with high staff turnover and growing patient expectations. So, how can you keep your operations running smoothly, control your costs, and meet the increasing demand for patient contact and support?

The answer lies in workforce planning.

According to a **survey** by Microsoft, 90% of customers indicated that customer service is essential when choosing a brand and staying loyal to it. When it comes to workforce planning, you must also consider balancing year-on-year

trends with seasonality and volatility – such as new product launches or promotions, shopping peaks during the holiday season, sporting and entertainment events, or weather-related disruptions. Detailed demand and workforce forecasting can help you avoid over and understaffing in your contact centers with better decision-making capabilities.

For example, during peak seasons like flu outbreaks or open enrollment periods, an advanced workforce planning tool can provide the precision to forecast demand accurately, ensuring the right number of agents with the necessary skills are available to handle patient inquiries promptly. Moreover, efficient workforce planning can serve as a financial safeguard to achieve more precise staffing and optimal cost efficiency.

Understanding how workforce gaps are created

Workforce management in contact centers has always depended heavily on data and analytics. At any given time, your team must consider:

- Patient satisfaction
- Fluctuating volumes of calls for sales and service
- Multiple channels of contact
- Increased data levels
- Employee availability and turnover
- Managing remote employees, ccontractors, vendors, and agencies
- The strategic goals and direction of your organization
- Specialized workforce skills and training

The latter, specialized workforce skills and training, is critical for keeping up with the latest business trends. Many healthcare organizations see challenges in training their staff to become proficient at addressing the increasingly complex interactions taking place in their contact centers.

These complexities hinder your ability to meet long-term forecasting accuracy, affecting weekly and daily scheduling needs along the way. Here are four areas in which you are likely to encounter workforce gaps:

External Factors
The economy and market conditions are constantly changing. If the past has taught us anything, we always need to plan for potential headwinds and hard to forecast occurrences such as uncontrollable natural events. **Your success hinges on having an agile strategy built on your ability to quickly pivot your workforce and operations, otherwise risking poor patient experience and outcomes.**

Customers across every industry have come to expect a more personalized level of service. According to McKinsey, 61% of customer care leaders have reported a growth in contact volumes and an escalation in the complexity of customer inquiries. External factors like these can create a greater need for higher-skilled resources, requiring more staff training time, which can impact workforce availability. In heathcare, they can lead to heightened patient dissatisfaction that triggers surges in call volumes that your contact center won't be equipped to handle without modeling different risk mitigation scenarios.

Talent
Training and skills gaps can undermine business performance and patient satisfaction. Often, these challenges stem from a planner's limited visibility into demand forecasts to determine how many people or the types of skills necessary to operate smoothly. This misalignment can lead to a talent shortage, creating poor patient satisfaction and contributing to revenue loss.

Your inability to retain top talent compounds this problem, contributing to budget overages, decreased productivity, and further regrettable attrition. Not to mention advancements in automated call handling that could impact demand for human contact center involvement. Finally, insufficient lead time for onboarding and ramping to full productivity may amplify the cycle of complexity, resulting in increased talent acquisition costs. Unplanned hires and the lack of proper skills, capabilities, and capacity needed for the multi-channel environment of a contact center – where patients are serviced via phone, text, email, or online chat capabilities – can further complicate your planning process.

Data

The growing demand for elevated patient care has prompted the creation of substantial amounts of data from a variety of sources, including patient information (and data records), call and service logs, interaction histories, and other relevant sources across various channels (email, voice, SMS, text bots, etc.).

Managing and making sense of this wealth and variety of information is crucial for you to make effective decisions and provide quality patient support. Herein lies a significant challenge: your team likely spends more time wrangling and sifting through data in spreadsheets than analyzing it to gain meaningful insights into your workforce needs. The result is an abundance of outdated data and data silos from fragmented

systems, spreadsheets, and reports that can further harm decision-making and lead to inaccurate workforce allocation, delays, and overall disruptions to service.

Traditional workforce planning methods

Basic workforce planning tools, such as spreadsheets, fall short when it comes to efficiently and accurately forecasting workforce needs and costs in contact centers. These tools are not designed for the collaborative, dynamic and fast-paced nature of the healthcare industry, where patient care is at the core. Spreadsheets are prone to human error, require manual data entry, time-consuming consolidation, and version tracking. They are typically shared via email and shared folders, risking data privacy and security. All this makes it nearly impossible for planners and managers to keep up with maintenance and to get real-time, accurate views of staffing needs.

For example, a contact center manager may spend hours updating a spreadsheet to forecast staffing levels across clinics for peak flu season, only to realize too late that changes in appointment volumes or staffing availability were not captured in real-time. This results in overstaffing during slower periods or, worse, understaffing during surges in call volumes, leading to longer wait times and frustrated patients, as well as burned-out caregivers.

Building better workforce agility with Anaplan

For contact centers, demand planning must connect with headcount planning and forecasting and incorporate costs and the skills and capabilities of your workforce. With Anaplan's Connected Planning platform, you can improve all workforce planning functions and streamline your staffing to minimize labor costs and meet business demands across your entire workforce.

Anaplan facilitates collaboration and enables capacity planning and optimization across your operations, finance, and HR teams. It replaces the need for conventional spreadsheets and manual handling of data with a single source of truth by seamlessly integrating with your existing systems of record and planning infrastructure to provide rapid, scalable scenario-based planning capabilities and machine learning for forecasting. To break down data silos and optimize processes across company functions, Anaplan's planning output can be fed downstream into workforce management (WFM) tools and reporting systems.

Trend-spotting: Demand forecast analysts and consultants can use Anaplan to understand the trends appearing in the contact types they're trying to forecast, helping them better understand the impact of certain events on incoming contact volumes. They can improve decision-making with more accurate forecasting that leverages powerful, integrated artificial intelligence (AI) and machine learning (ML). When looking at the demand, you'll have the flexibility to focus on specific channels, choose the start and end dates as well as look at specific days of the week, which is particularly important when understanding trends over time.

Scenario planning: As you move into the short-term planning phase, you'll have the ability to quickly scenario-plan what the next days and weeks could look like if several factors changed. Examples of factors include call forecast, call handle time, available resources, or target speed of answer. With Anaplan, you can model changes through Erlang[1] to determine the impact on expected service level performance, for example, the percentage of calls answered within 20 seconds.

Driving action: As you examine the impact on the expected service levels, you can use this insight to drive action in the business to open contingency plans to bring in more staff or to facilitate sharing resources between business areas where excess resources are available.

Specifically, with Anaplan, you can gain real-time insights into your key KPIs and multi-channel staff planning capabilities and gaps through the intelligent analytics in the platform, obtain accurate visibility into workforce demand with predictive forecasting, and balance your resource supply with patient expectations to optimize the overall performance of your contact center(s). **To help you close talent gaps, Anaplan provides you with complete transparency into headcount and costs, allowing for robust "what-if" analysis to assess the impact of any workforce changes.** Hence, you have the knowledge in hand to be able to pivot as your demand changes. Simultaneously, you can address workforce training and development needs and costs to build the right employee skills and improve talent retention.

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[1] Noun meaning a unit of traffic intensity in a telephone system equal to the intensity for a specific period when the average number of simultaneous calls is unity. It is dependent on volume, estimated handling time and average speed of answer

How can you benefit from Anaplan?

A Connected Planning platform eliminates the need for manually maintaining tens (if not hundreds) of spreadsheets and propels your contact center operations into the modern world. Data-driven cloud platforms like Anaplan provide real-time transparency into long- and short-term workforce planning, a crucial component to optimizing costs and meeting business goals across key stakeholders:

- **Core capacity planners** benefit from Anaplan by utilizing machine learning and other algorithms for forecasting to enhance planning accuracy with a high degree of confidence. You can make fast data-driven decisions based on available staffing, production hours, back-off planning, new hiring planning, and scenario planning, allowing more time to drive value on other tasks.

- **HR and talent acquisition partners** can pick up where capacity planners leave off by leveraging Anaplan to seamlessly integrate workforce requirement output into budget and position planning and execute hiring requisitions. You can also connect their plans to other HR systems and sources.

- **Training partners** can tap Anaplan to facilitate trainer assignments and training for existing agents and new hire classes. The platform gives you the ability to plan for all training, including training modules, trainer availability, and employee needs by team.

- **Business Process Outsourcers (BPO)** vendors can access Anaplan through a collaborative BPO portal that connects internal workforce teams with external BPO partners. It serves as a centralized platform that can manage contracted interactions or hours with vendors.

Anaplan in action: Solutions for the healthcare industry

Workforce capacity planning has long managed the ebbs and flows of contact center operations. However, despite its critical role in aligning the right size and cost of a workforce with forecasted demands, it has often been overlooked in strategic decision-making as workforce managers prioritize present insights. With Anaplan, you can reduce the risk associated with talent shortages and the sourcing of skilled and technical personnel. **Striking the right balance between patient demands and workforce capabilities is the key to managing costs and elevating employee engagement and patient satisfaction.**

No matter the industry your contact center may service, the factors that ensure operational efficiency are analogous to others in different fields of business and most are working on initiatives to incorporate digital channels as part of their patient support operations and are considering bringing in capabilities associated with interactions - voice and digital. Despite different drivers, businesses of all types face similar challenges and concerns that improved workforce planning can solve.

Here are a couple of real-world examples from healthcare leaders who have leveraged Anaplan to modernize their operational capabilities:
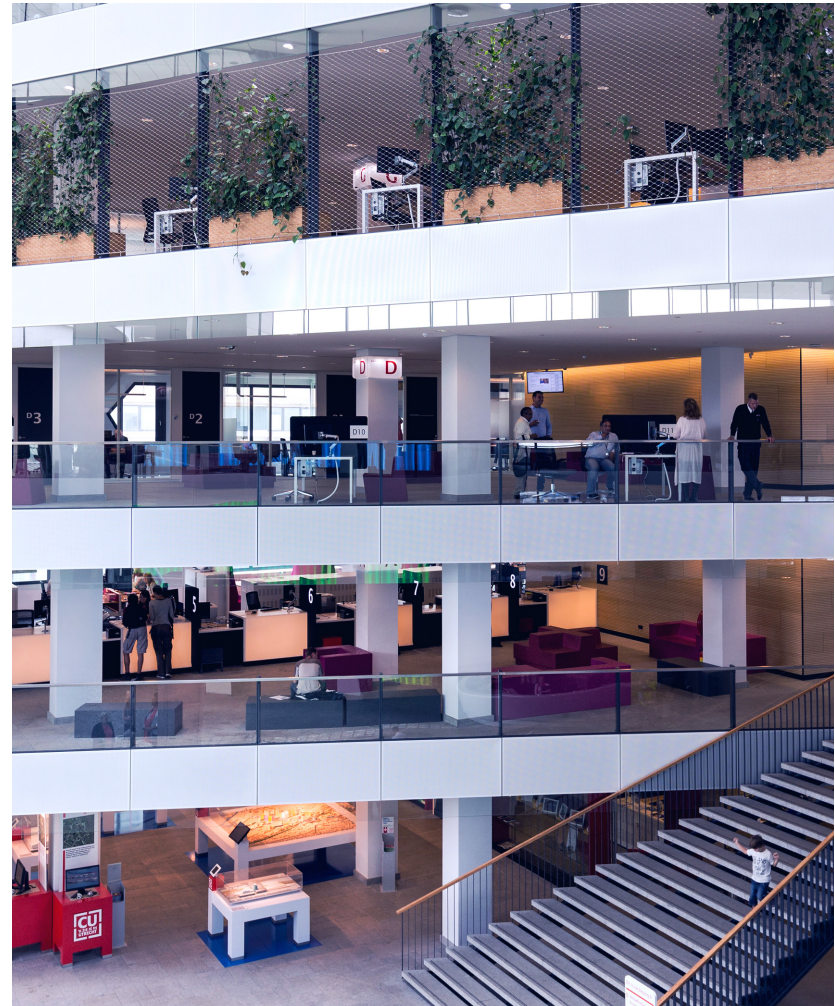
Ask for a personalized demo to learn how you can leverage the power of Anaplan to solve your organization's greatest workforce challenges.

Navigating mergers and acquisitions with a modern solution

As a prominent U.S. healthcare services provider with a broad spectrum of services, the company faced substantial challenges in managing workforce planning efficiently. Reliance on numerous spreadsheets for planning – especially with a growing workforce – led to procedural complexities and a need for more confidence in data management. The company sought a solution to streamline planning processes, enhance data confidence, and adapt to frequent changes due to mergers and acquisitions.

The challenge:

- **Numerous planning models spread across more than 800 spreadsheets** to handle intricate workforce needs
- **Dispersed staffing plans** for 2,500 agents employed at the contact center space presented challenges in consolidating staffing plans
- **Low confidence in data management**
- **Frayed merger and acquisitions (M&A) management** posed difficulty in navigating frequent changes

The solution and results:

- **One comprehensive platform** consolidated all planning models into **one connected plan**
- **Cloud-based tools** provided a systematic process for more visibility and smarter insights
- **Enhanced decision-making capabilities** restored executive confidence

Delivering effective emergency response

Disaster can strike anytime, so ambulance teams and emergency services must always be ready to respond fast. For the local ambulance service, trained people must be on hand to answer emergency calls when they arrive. Then, the right people and resources must be in the right place at the right time to ensure the best possible outcomes.

The challenge:

- **Inability to accurately balance resource capacity and demand** based on daily emergency call forecasting data
- **Manual, spreadsheet-based processes** created additional costs and complexities

The solution and results:

- **Scalable, cloud-native platform** improved integration and automation across the organization
- **Support for multi-location working** to effectively allocate human resources against a detailed workforce plan
- **Ability to process billions of data points monthly and display granular data** in collaborative dashboards that can be viewed on any device
- **Analysis of workforce plans in 15-minute increments**, ensuring value for taxpayers and delivering more effective care

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 the speed of the market. 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.

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