How Playvox Helped Zendesk Cut Daily Variance in Half

CASE STUDY

Quality

Learning

Workforce Management

Voice of the Customer

Performance

Coaching

Motivation

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Zendesk is a global CRM company that builds customer relationship software, serving more than 100,000 customers worldwide.

Highlights

Challenges

- Manual scheduling tools with very limited forecasting and no intraday insights
- No easy, automatic way to predict volumes
- A lack of exclusively cloud-based solutions that don't require physical data servers

Solution

- A 100% cloud-based solution
- That takes the guesswork out of forecasting
- And makes it easy to automatically understand volume trends

Results

- Daily variance reduced from 10% to consistently under 5%
- Seamless transition to work-from-home during COVID-19 crisis

Challenges
Manual processes and limited forecasting abilities

As Zendesk's Director of Workforce Management, a large part of Erin Filsinger's success depends on accurately forecasting and measuring the volume of incoming contacts from customers. She needs accurate, flexible forecasting to make staffing decisions, and provide the best possible experience for her customers.

> "One of our most important metrics is our variance of volume," she explains. "It measures whether we are forecasting our volume appropriately as it's coming in to make sure that we have enough people staffed."

Unfortunately, the scheduling tool she was using made detailed forecasting impossible.

> "We had a tool that wasn't a real WFM (workforce management) solution. It was more of a scheduling tool, but there was no data behind it," she says. "We would schedule blocks of time, and there was no variability because there was no insight into what we actually needed."

The processes Erin and her team used to create forecasts were extremely manual, which led to inaccurate estimates that they had no way to adjust.

> "Everything we did was manual. It would take a week to create a forecast that we could not adjust," she says. "We had to estimate where we were going to need people for different channels. But we didn't have any way to validate our results."

What's more, Erin had no way to get insights into volume fluctuations that happened over the course of a day: she could only access that metric the next day, when it was too late to make changes.

> "We had no intraday insights into how things were actually happening at smaller hourly intervals. We couldn't see what happened with our agents or our volume," she says. "We had no way to understand how we ended the day. The only acknowledgment we had was the metric the day after."

Erin had a real opportunity to improve variance of volume: with the right workforce management tool, she knew she could improve her forecasting, get granular insights into her staffing needs, and make smarter, more informed decisions. Now, she just needed to find the right tool to help her get there.

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Solution

A cloud-based solution with intraday forecasting and detailed volume predictions

When Erin began her search for a better WFM tool, she had several requirements. For one, Zendesk is entirely cloud-based, and needed a cloud-based solution.

> "Most of the established WFM solutions out there have everything that we need, but they have a hybrid on-premises hardware and cloud approach. They still require physical data servers," she says. "And we just don't use servers."

She also needed detailed data that would allow her to find the root causes of issues as they appeared. When she found Playvox Workforce Management, she knew immediately that this was the solution that fit all of her needs.

> "The fact that it would connect directly to our Zendesk environment and allow us to pull data from the source, without having to do any work to translate the data, was really the selling piece," she says. "But it was also more well-rounded than other WFM tools. It provides the real-time information and the data to actually start root causing behaviors. We can use it to look at more than just volume and adherence."

She expected a complicated implementation based on previous implementations with other vendors that hadn't gone smoothly. But she was pleased to realize she was wrong.

> "The process of implementing Playvox Workforce Management was surprisingly easy," she says. "The Playvox team was with us throughout the whole process. They met with us, they made sure our data was right, they were responsive. Their support is what made us successful."

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With Playvox set up, Erin began to see a difference almost right away. Within 30 days she could coordinate staffing on a 24-hour basis globally, a huge win for their global business.

> "Once we deployed Playvox, within the first week, we were able to validate pain points that we knew we had with our staffing," she says. "We were able to initiate a global shift alignment within 30 days to know exactly where we needed to put all of our people on which shifts 24/7, because we could see our trouble spots that we were blind to before."

When the COVID-19 pandemic started, Playvox also helped Zendesk shift seamlessly to working from home.

> "By having Playvox in place and having the volumes and the schedules already operationalized, we were able to make an immediate, overnight transition from being an in-office environment to an at-home environment, without having any gaps in understanding where people needed to be," she says.

> **"We were able to initiate a global shift alignment within 30 days to know exactly where we needed to put all of our people on which shifts 24/7, because we could see our trouble spots that we were blind to before."**

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Results

Faster insights, more flexible reporting, and daily variance cut by half

Using Playvox Workforce Management has allowed Erin and her team to improve one of their most important metrics: they cut daily volume variance in half.

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> "Prior to using Playvox, our daily variance was consistently at 10%," she says. "Since we started using Playvox and allowing the system to pick up the trends of our volume, our variance has consistently been below 5% daily."

Erin's colleague Lynn Miller-Bright agrees that Playvox has been a gamechanger for their team: having immediate access to their data makes it easy for them to react to changes in the moment, she says.

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> "I can tell instantly when something is spiking, when I need to get people, what that volume looks like, and what the impact of that is going to be that day," Lynn says. "We can make immediate real-time changes based on anything happening in the moment. And we just didn't have that insight before."

Now, Erin says she doesn't want to imagine what life would be like without Playvox Workforce Management —but Lynn has some idea.

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> "Life without Playvox would be chaos. Everybody would have to scramble to figure out where they need to be, and when," Lynn says. "We would have no way of knowing whether or not we are meeting our customers' expectations."

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Want to improve your forecasting and accurately predict customer contact volumes?

See Playvox in action today.

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