

# Building your Workforce Management [WFM] business case

How to gain internal buy-in



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## Dialpad WFM



### **Dialpad supports people.**

At Dialpad, we understand that investing in your workforce leads to better customer experiences. Having faced the challenges of scaling a customer support team firsthand, we recognized the need for a more modern, less intrusive approach to workforce management (WFM).

Our WFM feature treats teams like the heroes they are, not resources.

[www.dialpad.com/contact-sales-wfm](https://www.dialpad.com/contact-sales-wfm)

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# Recognizing the need for WFM

If you're looking to improve the quality of your service and the cost efficiency of your support team, workforce management tools can help.

For customer service teams of any size, an easy-to-implement workforce management tool can be ROI positive within the first three to six months, meaning the cost of the product more than pays for itself through efficiency improvements.

Whether you're looking to improve metrics such as service level performance, customer satisfaction, net promoter score, cost to serve, or team happiness (eNPS), good workforce management brings all the pieces together to make your organization run efficiently with excellent care for both your customers and your employees.

## Gaining internal buy-in

You recognize the efficiency gaps in your support operations and understand the potential of WFM to bridge these gaps. The challenge now lies in constructing a business case that resonates with your decision-makers.

This eBook is designed to be your guide in building a compelling business case. We'll walk you through translating operational challenges into persuasive, solution-focused metrics, effectively securing buy-in from your decision-makers..

# Why support teams need Workforce Management (WFM)

Customer support teams have become more complex than ever before.

This is partly due to evolving customer expectations and partly because of shifting workforce dynamics. Combined, these factors create added pressure on customer-focused organizations to deliver top-tier experiences that help retain customers, drive revenue growth, and manage costs effectively.

## Changing customer expectations

Customers expect to be able to reach you faster and in ways that are more convenient to them. This is how omnichannel support has become more ubiquitous. A customer may not be able to phone in on weekdays during business hours, but they can send an e-mail or a message on live chat or even WhatsApp. More customers today are using social media networks to get in touch with brands or services, and given the public visibility, it's increasingly important to manage those services closely.

Equally important is the hours customers expect to be able to get in contact with you. Support teams open only during business hours are becoming increasingly rare, especially in industries with a high degree of urgency—utilities, travel, mobility, healthcare, and even retail and e-commerce, among others.



Extended hours and easier customer access bring challenges in ensuring the right people are available at the right time, while also maintaining a fair and balanced schedule for agents.

Increasingly, brands are held accountable for their support operations through review sites and public complaints. Whether it's Trustpilot, Google or G2 reviews, or in regulated industries advocacy bodies, the publicity of customer support interactions has become a key criterion for consumers when deciding which brands or services to purchase.

**According to our research, 62% of negative public reviews allude to poor customer service interactions.**

These are split between long response times (waiting on the phone, no email response) and poor quality service interactions (not solving a customer problem).



## The evolving workforce

Remote and hybrid customer service teams have become increasingly popular following the pandemic. This has allowed companies to expand the talent pool they can hire from and leverage different time zones to offer extended hours and serve customers worldwide. The need for the right tooling increases with a remote or geographically dispersed workforce.

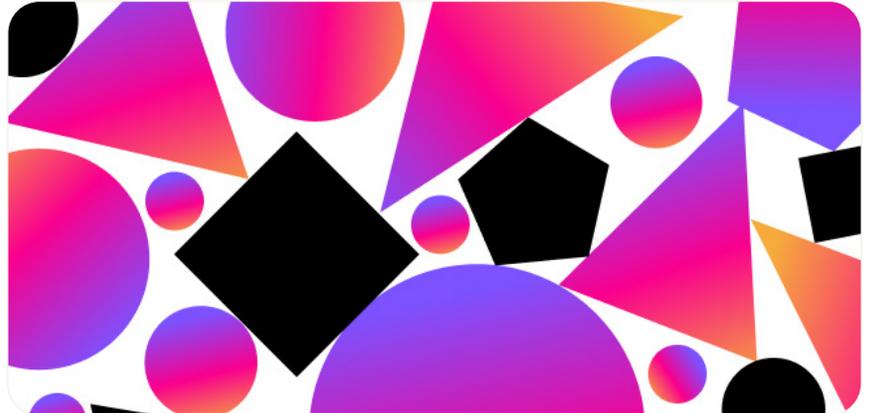
Whether you need to manage schedules, handoffs between locations, or better visibility into metrics, workforce management software allows you to do so seamlessly.

With labor law compliance varying across different geographies, workforce management also ensures that you always comply with working hours legislation, overtime regulation, and payroll requirements.

**Flexible working has gone from a nice to have to a need to have.**

With more competition in hiring, team attrition, and extended hours for customers to contact support, accommodating preferences, split shifts, and part-time work have become crucial ways for support teams to structure themselves to match customer needs while keeping team morale high.

## Push for change



**Too often, customer support teams continue to glue together broken and outdated processes.**

Most of the time, we see this as cobbled-together spreadsheets, which result in a lack of visibility and transparency and inhibit the ability to meet customer needs.

This manifests itself in long wait times (missed service level agreements), low productivity (impacting cost), reduced CSAT, and an impact on public reviews that impact future revenue growth.

At the company level, there is no source of truth to make business-critical decisions about headcount, metrics, or actual performance. Without this, teams are at odds on how to proceed.

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01.

What should our service level agreements (SLAs) be set at?

02.

What are the correct opening hours for each team?

03.

What should our performance targets be?

04.

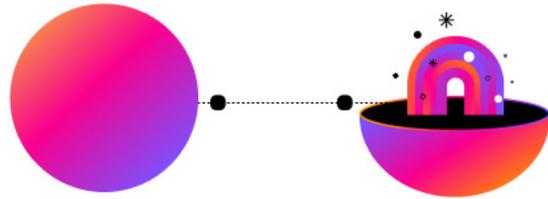
How much outsourcing capacity is needed to meet peak demand?

Good workforce management reduces the decision fatigue in answering these questions, surfacing actionable data to drive positive business outcomes.

Even without spreadsheets, a company can rely on an outdated technology stack that doesn't connect disparate systems, requiring manual work and a lack of trust in existing systems. The timing is right to change systems when you start seeing a decline in service performance or team morale.

Too soon, the problem will compound - manifesting in more abandoned calls, lost sales, higher costs to serve, and competitors getting ahead because of better service tooling.

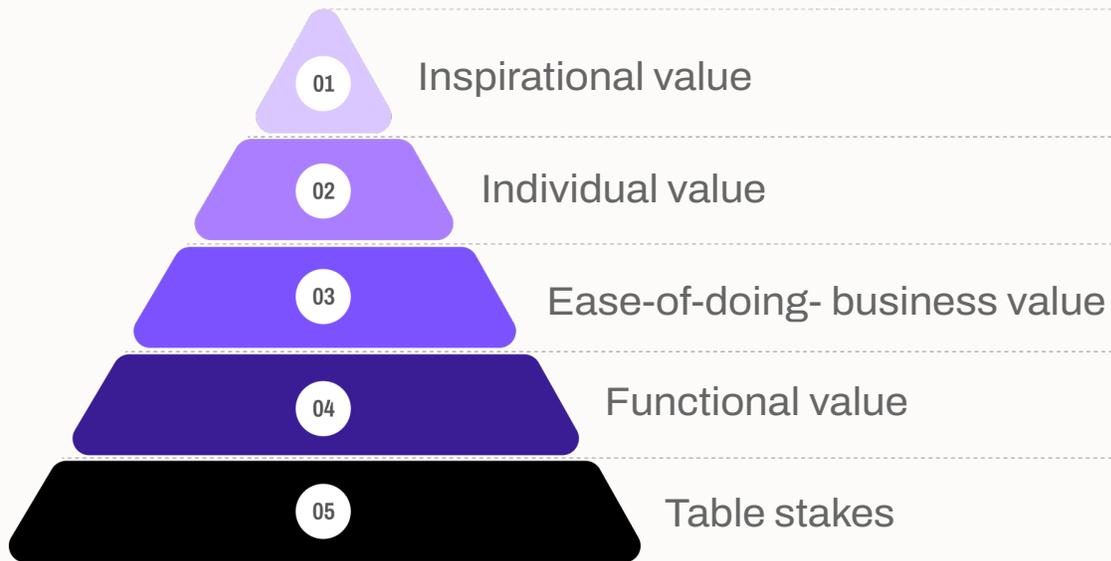
## Identifying business impacts



### From basic to optimal: understanding the business impacts of acquiring a workforce management solution

Understanding the specific necessity of WFM is critical for articulating its value to an organization. By categorizing impacts and needs across various levels, you can illustrate the extensive influence WFM will have on the business - from fundamental decision-making factors to strategic enhancements.

Crafting your business case with this structured approach significantly increases the likelihood of securing buy-in from decision-makers. It demonstrates that the solution you advocate for meets the essential operational enhancement requirements and propels your business's broader objectives forward.



### 01. Inspirational value

Culture Improvement  
Enhances brand and service reputation

### 02. Individual value

Easy to use  
Upskills team members  
More time on high value tasks

### 03. Ease-of-doing-business value

Quick onboarding  
Saves time on manual tasks  
Allows reliable advanced planning  
Agility to handle quick changes  
Better visibility for admins, managers & agents  
Connects with BPO  
Improved quality of support  
Accurate capacity forecasting  
Enable advanced resource planning  
Higher eNPS and employee engagement

### 04. Functional value

Improved revenue though higher reviews and reduced customer churn  
Reduction in cost to serve with improved efficiency  
System is scalable in line with business growth  
Integrates with existing technology stack

### 05. Table stakes

ROI positive <6 months  
Data security and privacy compliant  
Minimal impact on engineering and product roadmap from implementation  
Labour law compliant  
Configurable with operating model

# How to decide which WFM to select

## Implementation in <1 month

You want to see value from your workforce management system as quickly as possible, so quick implementation is imperative. Depending on your team structure, you should be able to set up and onboard your team within the first month, assuming a centralized workforce management model.

## Easy to use

As many say, you shouldn't need a "PhD in workforce management" to know how to use a solution. Anyone, from central planning teams to distributed team leads and even your agents, should be able to use the tool and get value from it.

## Creates equal experiences for different users

The workforce management system is not just designed for workforce managers—it's built for the entire team. The more accessible workflows are for team leads and agents, the greater the value your team will gain. Many tasks are handled asynchronously across different systems, leading to inefficiencies and errors. A unified workforce management solution centralizes these processes, reducing the chances of missed tasks, manual mistakes, and wasted time.

## Surfaces the right data

You don't need hundreds of metrics to evaluate your performance or identify necessary changes—you need the right data. This data should answer two key questions:

Will I meet my service level targets, and at what cost? What assumptions drive this, and how will higher inflow or lower performance impact the outcome?

If I missed my service level targets, why? Was it due to inaccurate forecasting, improper scheduling, or missed productivity goals?



### **Reduces decision fatigue**

A good workforce management tool helps reduce decision fatigue by providing the right information and clearly addressing the 'so what?'—showing the impact of those decisions.

### **ROI positive in < 6 months**

Your workforce management system should be easy to attribute value to. This should be evident in improved service performance and reduced cost to serve.

### **Allows re-optimizing with ease**

An effective workforce management solution enables you to handle most of the heavy lifting upfront, allowing you to plan your team confidently and ensure your customers receive the best possible service. The best systems also offer the flexibility to adapt quickly when circumstances shift—whether it's higher inflow, unexpected absences, or additional tasks that need to be scheduled.

### **Integrates seamlessly with your existing tech stack**

Your WFM solution should be in collaboration. It needs to blend into your current technology ecosystem effortlessly. Whether it's syncing with your HR platforms, calendar, customer support ticketing tools, or team communication platforms, the right WFM software should act like a natural extension of your existing set up. Dialpad WFM is embedded in Dialpad Support, a full support and contact center solution.

# Explain the “why now?”

## Strategic priorities

Identify the current strategic priorities and key concerns of the C-level leadership.

## Current situation

Describe what challenges or friction is facing the business.

## Negative impact

Outline the cost of doing nothing or maintaining the status quo.

### Relevant case study

A flower delivery business wanted to reduce their reliance on external providers from three BPOs to one to reduce their cost to serve.

Using spreadsheets, they needed a consolidated view of their forecasted requirements and how schedules across three organizations matched their capacity requirements.

### Relevant case study

A fresh dog food delivery business was using workforce management that didn't connect to their tech stack, resulting in over five additional hours spent on manual work and inaccurate coverage of live channels.

Leaders understood the impact low coverage could have on customer wait times and CSAT, so they prioritized finding a tool that could integrate with their existing technology.

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### Other examples

- Improve CSAT and productivity
- Industry-leading service performance
- Scale the support team to match growth forecasts
- Enable flexible ways of working (hybrid, working hours, preferences)

### Other examples

- Inability to offer flexible work
- Competitors offering better service
- Metrics worsening
- New technology implemented

### Other examples

- Reputation
- Increase in cost to serve
- Reduction in revenue from increased churn
- High agent attrition

## Make the decision easy by surfacing targeted information

When making a business case, you must tailor your messaging to the relevant decision-maker and show what value they and the company will benefit from.

C-level decision-makers, in particular, are focused on the return on investment. They are particularly interested in how the WFM solution can positively influence service metrics, drive revenue, and reduce costs.

- To get different stakeholders bought in, make sure you have a view of what matters most to them:
- What are their unique challenges? What can WFM resolve for them?
- What is the cost of them not doing anything to address these challenges?
- How does workforce management address their hierarchy of needs?



## **CEO**

If you operate in an industry with a high frequency of customer support requests and where competition exists, customer service will be a key revenue driver for the business and enhance the reputation of your brand or service.

Companies like Zappos, Apple, and Natwest have made significant investments in turning customer service into a profit center. To remain competitive and be part of this trend, it's important to consider a similar investment in customer service.

According to research from Zendesk, 50% of customers would stop transacting with a company after one bad customer service experience, and 70% of customers say they would stay with a company after one good customer service experience.

## **COO / CCO / VP of Customer Experience**

Operational efficiency and excellence come from having the right data at your fingertips to power impactful decision-making.

To ensure you're running a team driven by efficiency and results (service level performance and CSAT), you need the right technology in place that connects your ticketing, telephony, HRIS, communication, and calendar systems to provide a single source of truth.

With the right tool in place, you can confidently ensure that your service levels and operational metrics are being met in the most cost-efficient way possible.

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## **CFO**

Cost to serve is becoming an increasingly important metric. With the right tool in place, you can avoid bloated future headcount costs and outsourcing agency costs and ensure your team is the right size relative to the volume of customer inflow, accurately matching customer demand with the suitable capacity.

## **CMO**

Good growth is powered by retention and word of mouth. A solid customer experience contributes to this—whether through public reviews or referrals, the best brands have their customers as external advocates.

With growth forecasts also comes increasing pressure on the customer service team to maintain phone wait times and email backlogs. A CMO wants to see its growth efforts well-spent if support is set up to ensure customers have delightful interactions with your brand or service.

## **CPO / Head of HR**

Typical attrition in a customer support team ranges from 40% to 100% annualized. Much of this can be prevented by offering more flexible ways of working and giving team members better visibility to make decisions that work for them while achieving business outcomes.

By utilizing robust workforce management software, labor laws and contracts are automatically followed, minimizing the risk of manual errors. This includes aligning schedules with contracted hours, ensuring compliance with overtime policies, and balancing business needs with fairness. Such practices ultimately boost morale within the customer support team.

With workforce management integrated into HRIS systems, there is no need for duplicative work, and all data is connected to a single source of truth.

## Focus on value, not features

Too often, business cases focus on breaking down the features or capabilities.

### **Workforce management solutions aim to answer three questions:**

1. Are you meeting business demand?
2. Are you meeting business demand with quality?
3. Are you meeting business demand with quality and cost efficiency?

Focusing on these three value drivers can lead to an ROI calculation that proves the software pays for itself. A decision maker will most often make a purchasing decision based on a return on investment.

By understanding which value drivers matter to your company, you can calculate the return on investment for workforce management tools.

It's beneficial to separate the primary outcomes of implementing workforce management, followed by the secondary metrics.

Secondary metrics can include reduced software costs through system consolidation or reduced customer churn through improved service levels. In highly regulated industries, these metrics may also include lower compliance penalties or fewer repeat customer issues due to faster responses and better-trained agents.

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## ROI drivers of WFM include:



### An increase in...

- Customer satisfaction.
- Public review (Trustpilot, Google, G2) ratings.



### An improvement in...

- The calls are answered within your target service level.
- Reachability (for example, out of hours).
- Revenue and top-line growth through reducing abandoned call/email backlog rates.



### A reduction in...

- The cost to serve by avoiding over-staffing.
- Future headcount costs through increased productivity.
- The cost of outsourcing.
- Paid overtime costs.
- Attrition.
- Time spent scheduling.

# Calculating ROI

## Calculating the ROI is a critical step in making a persuasive business case.

To do this, you'll want to consider both tangible and intangible benefits and direct and indirect costs.

Here is a step-by-step guide to help you calculate and present the ROI to your decision-makers:

### 1. Time to go live

- Calculate the time from signing the contract to fully operational status.
- Be clear on the "aha" moment where you expect first to see the value (automating manual tasks), and at what point you expect to see an improvement in metrics.

Support teams should see benefits from the tool within the first few weeks and be ready to onboard their teams within the first month.

### 2. Time to ROI

- Determine the breakeven point by comparing investment costs against financial gains or cost savings.
- Identify early wins, such as time saved from automating manual tasks.
- Be realistic around the time to ROI but ensure that the WFM solution makes sense for your business.

Workforce management should be ROI generative within the first six months.

### 3. Revenue drivers

- Assess how improved customer service impacts customer retention and average order value.
- Quantify benefits relevant to your industry.

Retailers and e-commerce providers experience this directly through inbound orders, whereas industries such as utilities and software see this through churn reduction and an improvement in public sentiment.

### 4. Cost minimization

- Outline how the tool reduces future costs by enhancing productivity and scheduling accuracy.
- Calculate specific cost savings from reduced headcount needs, lower overtime expenses, and decreased reliance on external staffing.

## ROI calculation formula

$$\text{ROI} = \frac{(\text{Net gain from acquiring WFM software} - \text{Cost of investment})}{\text{Cost of investment}} \times 100$$

To calculate the net gain from investment, consider:

1. Increased revenue from improved retention and higher customer lifetime value.
2. Cost savings from enhanced efficiency and reduced need for additional staffing.

To calculate the cost of investment, consider:

1. Software purchase or subscription fees.
2. Implementation and integration costs.
3. Training and development expenses.

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## CONCLUSION

# Focus on company value creation

**Most organizations know there is increasing pressure to deliver delightful customer service experiences.**

Whether it's competitive pressure, regulatory requirements, churn risk, or potential lost revenue, customer service is crucial for driving profit for your organization and keeping costs under control.

When making a business case for stakeholders, focus on how implementing workforce management can impact the metrics they care about. For you, it might be about saving time or improving confidence that CSAT and SLA targets will be met; for them, take it one step further to see how this impacts revenue and costs.

With multiple stakeholders that can benefit from workforce management software, it's easy to create a business case focused on value, but very often, it's tempting to talk about features.

By tying features or capabilities to unlocked values, you can make it much easier for stakeholders to make decisions.

At Dialpad, our platform is built to provide meaningful ROI and value for every stakeholder.

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