Improve Service Rep Experience With Flexible Scheduling
Inflexible scheduling in service organizations leads to employee dissatisfaction and turnover, and makes organizations less competitive employers. This research explores how leading service and support leaders have created more flexible schedules for customer service reps.
Overview

Key Findings

- Work-from-home arrangements give customer service reps flexibility in choosing where to work, but only a few reps can flex when and how much they work.

- Many customer service leaders believe greater schedule flexibility will harm operations and increase costs, yet some service organizations have found this is not the case.

- Innovations in intraday workforce management enable customer service leaders to give reps the power to make decisions about when and how much to work in real time.

- Organizations that improve rep schedule flexibility by giving reps control over their workday have seen improvements in agent satisfaction and well-being without any negative impact to operational efficiency.

Recommendations

Customer service and support leaders responsible for workforce engagement management should:

- Identify which additional technologies and capabilities are required to offer real-time flexibility to customer service reps by auditing existing intraday workforce management capabilities.

- Automate managerial approval of rep-initiated schedule changes to give reps control over adding, dropping or swapping shifts in real time.

- Identify patterns in reps’ break-taking behavior by piloting and monitoring unscheduled breaks.

- Provide unscheduled, on-demand well-being breaks to address reps’ emotional needs.
Introduction
The COVID-19 pandemic led service organizations to rapidly transition to working from home. While employee safety and business continuity needs drove this transition, the added flexibility improved the rep experience. And now reps are expressing a desire for even greater flexibility in their schedules — not just flexibility in where they work, but when and how many hours. If organizations can’t meet employees’ needs for flexibility, they may have trouble retaining and attracting talent — especially as other organizations begin to offer more flexible opportunities. This report describes how innovative customer service and support leaders provide this flexibility by giving reps the power to make in-the-moment decisions about their workday, which improves the rep experience without harming operations.

Analysis
Offer Reps Flexibility to Choose When and How Much, Not Just Where, to Work
More customer service reps have greater flexibility in where they work than ever before. As of October 2020, 76% of service leaders report most of their workforce works from home. And as of early April 2021, 94% of customer service leaders intend to offer some form of hybrid work model in the future. However, employees desire flexibility beyond just where they work. In a recent survey of 5,000 employees, we asked them which forms of flexibility they would most like their employer to offer. Thirty-two percent of employees indicated they wanted flexibility in their daily work hours, which tied with flexibility in work location (see Figure 1). In addition, 29% indicated they wanted flexibility in the length of work week (for example, working more hours over fewer days) and 7% wanted flexibility in their total hours per week (for example, working less than 40 hours for a reduction in pay). As service organizations struggle to attract and retain customer service talent, offering increased flexibility is a key way to become more competitive as an employer. But it can be challenging to offer flexibility beyond work-from-home arrangements, as the rep role is historically a tightly scheduled, reactive and on-demand role. Consequently, service leaders are asking themselves how their organization can provide their reps with the flexibility they demand without negatively impacting customer outcomes or cost.
Figure 1. Employee Preferences for Different Types of Flexibility

<table>
<thead>
<tr>
<th>Type of Flexibility</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Location (e.g., work from home, co-working, in office)</td>
<td>32%</td>
</tr>
<tr>
<td>Daily Work Hours (e.g., 7 to 3 instead of 9 to 5)</td>
<td>32%</td>
</tr>
<tr>
<td>Length of Workweek (e.g., working more hours over fewer days)</td>
<td>29%</td>
</tr>
<tr>
<td>Total Hours per Week (e.g., working less than 40 hours for a reduction in pay)</td>
<td>7%</td>
</tr>
</tbody>
</table>

n = 5,000 Employees
Q: If given the option, which of the following forms of flexibility would you most like your employer to offer?
Source: 2020 Gartner ReimagineHR Employee Surveys
Enable Reps to Adjust Schedules in Real Time

Many organizations experimenting with flexibility do so by offering alternative schedule options, such as compressed work weeks or flextime. However, organizations that reap the full benefits of flexibility don’t just provide more choice in the types of schedules they offer reps, they actually give reps control over their schedules in real time. Reps at these organizations are empowered to make in-the-moment decisions about when, where and how much they work. This enables reps to flex their schedules based on personal needs and customer demand, and therefore improves reps’ well-being and business outcomes.

Innovations in How Much People Work

Typically, service organizations create flexibility in how much a rep works by adjusting reps’ schedules week by week or even month by month based on customer or employee demand, allowing reps to take on fewer or more hours in any given week.

However, cutting-edge organizations have figured out how to offer up-to-the-minute, automatically generated shift-change opportunities. They send out alerts based on business rules and current circumstances, and allow reps to voluntarily accept extra shifts, voluntarily give up shifts, or swap shifts with other reps with little-to-no supervisor or workforce management team intervention.

How Do They Create More Flexible Schedules?

Reps typically receive shift-change opportunities through a mobile app or through their web browser. Organizations offer shift-change opportunities in 30-minute increments through text or email notifications that reps may opt into. Reps can then accept or reject these opportunities according to their needs and desires, and there are automatic approvals so reps don’t have to wait for the manager to agree before taking on extra time, swapping shifts or accepting undertime opportunities. This creates a more seamless experience for the rep, but also enables organizations to quickly ensure they’re appropriately scheduled.

There are usually some limits to a rep’s ability to change their shifts, for example:

- Requiring manual approval for shifts that exceed the daily maximum allotted hours
- Blocking reps who have repeatedly not shown up to extra shifts from accepting shiftchange opportunities
- Limiting underperforming reps from receiving shift-change opportunities
- Not allowing extra shifts to conflict with scheduled training or coaching sessions
Aside from core workforce management (WFM) capabilities, organizations need:

- A system that allows two-way communication between the agent and the organization about shift-change opportunities.
- A system that can determine when shift changes are necessary and automatically send communication to reps that meet the required criteria without human intervention. It determines these shift-change opportunities based on the overall environment, rep status, rep activity, queue status and preset business rules.
- Automatic approvals for shift-change opportunities — specifically, a way for the agent to directly accept extra time and undertime, and swap shifts with other agents without going through their manager.

While a work-from-home workforce is not strictly required, it enables organizations to reap the full benefits of this strategy, as last-minute shift changes are less disruptive to a rep at home than in the office.

See our Workforce Engagement Management Magic Quadrant to see which vendors offer these capabilities.

Organizations that offer these up-to-the-minute shift-change opportunities have seen improved employee outcomes, such as better work-life balance, increased employee wellbeing and retention. They have also seen reductions in over- and understaffing and in WFM processing time.

**Innovations in When People Work**

In addition to experimenting with shift-change opportunities, organizations are also experimenting with how they provide breaks to their reps. Rather than schedule breaks, they’re enabling the rep to decide for themselves when they want and need to take a break.

In our first example, The Home Depot provides agents with more control over their day, giving them freedom to take their lunches and breaks whenever they want. Our second example shows how Anglian Water Group considers how flexibility can improve long-term engagement and performance by giving reps the opportunity to take well-being breaks when they’re most vulnerable.
Case in Point: Flexible Scheduling of Breaks and Lunches (The Home Depot)

The Home Depot has removed scheduled lunch and break times from agents’ schedules and instead allows them to take lunches and breaks throughout the day, as long as they don’t exceed their allotted time.

Agents receive 90 minutes of break time throughout the day: 60 minutes for lunch and 30 minutes for miscellaneous breaks. Agents can take their lunch break as a 60-minute block at any time of day outside of the first or last hour of their shift. Their 30 minutes of break can also be taken at any time outside of that first or last hour, either in one block or broken up across their shift.

The Home Depot felt confident that unscheduled breaks would not harm operations after tracking and analyzing agent behavior and its effects on operations through a series of pilots. Through these pilots they discovered agents’ break-taking choices generally mimicked fully optimized, predetermined schedules. While an individual agent’s break-taking choices varied day to day, in aggregate their behavior was predictable and fell into easily identifiable patterns. For example, most agents choose to take a break after a few hours, take their lunch break in the middle of the day and take a short break toward the end of their shift.

While agent-chosen breaks mostly align with a fully optimized schedule, The Home Depot minimizes inefficiencies by leveraging an outsourced pool of fully scheduled staff to fill predicted staffing gaps throughout the day. The Home Depot sources this supplementary pool from their BPO partners, but this need could also be filled, for example, by rotationally scheduled staff, part-time staff or freelancers.

Finally, to support this approach, The Home Depot has stopped measuring schedule adherence. Instead, it measures schedule conformance — whether an agent exceeded their 90-minute allotment of break/lunch time each day. Agents are held accountable to this measure as a personal performance metric.

Aside from core WFM capabilities such as forecasting and intraday management, organizations need:

• The capability to model and predict future agent break-taking behavior to predict when the organization is at risk of missing SLAs

• A way to compare actual agent break-taking behavior to an ideal schedule to ensure offering unscheduled breaks does not harm the ability to meet SLAs and customer needs

The Home Depot has seen improvements in employee outcomes, such as:

• 18% improvement in Voice of the Associate (VOA) scores specific to agent satisfaction with their schedule and work-life balance.

• 95% of agents felt more productive when helping customers.

• 83% of agents felt less anxiety about managing and adhering to break/lunch time.

• 93% of agents felt empowered to take care of personal needs.

It’s also seen operational improvements, such as:

• 2% improvement in agent absenteeism

• No discernable loss in schedule conformance in aggregate across one month


Case in Point: On-Demand Well-Being Breaks (Anglian Water Group)

Anglian Water Group (AWG) offers their reps a 20-minute break they can take on demand to recover from emotionally draining situations. Reps can take as many well-being breaks as they need, and these well-being breaks are provided in addition to regularly scheduled breaks.

While reps can take these breaks any time they need to, AWG enables reps to make informed decisions about when to take well-being breaks by offering a transparent view into the forecast call volumes each day through their workforce management system. AWG color codes 20-minute intervals as green or orange to signal that call volumes are expected to be low or high relative to available staff. Once a rep decides to take a well-being break, they use a specific care code to begin their break. This allows AWG to monitor outliers using a disproportionately higher amount of well-being breaks relative to their peers, which helps supervisors identify reps in need of additional support or coaching.

AWG has a safeguard that allows them to suspend or delay well-being breaks if the number of reps taking breaks at any given time threatens their ability to hit their SLAs. This takes the form of an automated email, configured within a real-time analysis system, which is sent to managers to alert them of high levels of break use at one time. However, none of its teams has ever needed to pause well-being breaks.

The capabilities required are:

• A way to display real-time forecasts of busy and slow call periods to reps
• Automatic approvals of well-being breaks
• The ability for managers to analyze current usage of well-being breaks to determine if their teams can still comfortably meet SLAs

AWG has seen improvements in employee outcomes, such as:

• 38% decrease in number of sick days taken between August 2020 and March 2021
• 8% decrease in attrition between August 2020 and March 2021.

It’s also seen operational improvements, such as:

• 52% reduction in unavailable hours per month between July 2020 and March 2021; the majority of unavailable hours remaining are well-being breaks
• No change in SLA adherence between August 2020 and March 2021
Increased Flexibility Benefits Reps Without Harming the Service Organization

Offering flexibility beyond work-from-home arrangements improves work-life balance and enables service organizations to become more competitive employers. While it may seem challenging to provide flexibility in the customer service context, there are ways to increase flexibility without incurring unnecessary cost or negatively impacting the customer experience and operations. Best-in-class organizations move beyond flexible shift types and give reps the power to make in-the-moment decisions about their workday, such as by offering unscheduled breaks or dynamic shift-change opportunities. These organizations have all seen improvements in agent satisfaction and well-being without harming operational efficiency.
Actionable, objective insight

Explore these additional complimentary resources and tools for customer service & support leaders:

Research
Reduce Call Center Attrition
Learn what drives rep disengagement and set strategies to reduce your call center attrition.

Research
Build a Long-Term WFH Strategy
Understand the key elements of a successful customer service WFH program.

Research
Metrics to Monitor for Lasting WFH Success
Change how the service function is measured to account for new realities.

Article
Future of Work From Home for Service and Support Employees
Understand employee desires on key aspects of work from home to help shape strategy moving forward.

Already a client?
Get access to even more resources in your client portal. Log In
Connect With Us

Get actionable, objective insight to deliver on your most critical priorities. Our expert guidance and tools enable faster, smarter decisions and stronger performance. Contact us to become a client:

**U.S.:** 1 855 811 7593

**International:** +44 (0) 3330 607 044

**Become a Client**

Learn more about Gartner for Customer Service & Support
gartner.com/en/customer-service-support

Stay connected to the latest insights ▼ ▼