

Insite's WFM tools save \$2 million for North America's largest energy and home services provider.

As the largest energy retailer in North America, our client owns 13 brands that provide home warranty and energy and home services to 6 million customers.



\$2 Million

Saved Through Process Optimization

22%

Schedule Adherence Improvement

+9 Points

Increase in Forecasting Accuracy



Challenges

The client wanted to [optimize their WFM approach to reduce operating costs without diminishing service levels](#). They identified a need to develop improved standard operating procedures (SOP) and comprehensive training to establish the proper practice of new SOPs company-wide. Due to the nature of their product, the client experienced an annual spike in service demand during the summer months. Their lack of an accurate forecasting model created staffing challenges during peak season, resulting in fluctuating under and overstaffed schedules.

Additionally, inconsistent messaging and a lack of feedback loops created significant inconsistencies within their knowledge management structure, perpetuating the dissemination of outdated content. [Their domestic and global contact centers struggled to service their customers efficiently and informatively without access to the knowledge they needed](#).

The client partnered with Insite to identify and solution the many areas of opportunity within their technology and process procedures to improve WFM, operating costs, and the customer experience.



Solutions

To identify opportunities within their short-term and long-term forecasting procedures, we comprehensively evaluated the client's workforce management activities across each line of business. Observation and analysis provided insight into the consequences of outdated model prediction techniques and the effects this variability had on financial performance. [Our team discovered the root cause of major inefficiencies within the knowledge management structure, process mapping technique, and staff augmentation practices](#). We made several recommendations for critical improvements to help the client achieve their goal of optimizing operations while reducing cost. experts continued to support and train staff where needed to ensure successful execution of these new initiatives.



Results

By implementing our recommendations, our client saw significant results in a wide range of areas:

- Our schedule adherence methodology, which leverages a transparent and simplified scoring process, fostered an adherence **improvement of 22%, with potential annual savings equating to \$930,000**.
- An internal **database-centered attrition tool** became a source for comprehensive real-time attrition reporting, creating greater accuracy in planning for the need of new hire classes.
- We consolidated, updated, and defined AUX codes in the IEX, **streamlining information and producing standardized reporting** across systems. Our team then retrained the staff to ensure adherence to these processes, enabling accurate queue monitoring.
- Our experts developed a forecasting model to optimize staffing at non-peak intervals, reallocating 78 hours per week to periods of higher volume, **creating the opportunity to save \$300,000 in labor costs**.
- By streamlining 10+ forecasting tools that could not interact into a single, comprehensive capacity planning tool, **we improved forecasting accuracy from -8% (points) to +1% (points) across a 16-week period**. This tool closed the 100% accuracy delta by 7%, enabling the client to staff 4-5% closer to future volume, **creating \$750,000 in savings**.

If you would like to learn more, contact us at connect@callinsite.com

