Business & Management Units

Genesys WFM Business & Management Units Documentation

Study Notes

Topic	Description
Business Unit	Organizational unit grouping management units sharing objectives
Management Unit	Sub-unit containing agents (max 1,500 per MU)
Agent Capacity	5,000 max per BU, 1,500 max per MU
Hierarchy	BU → MU → Site → Team → Agent
Permissions	Granted at BU level for forecasting, MU level for local control
Multi-MU Scheduling	Forecasts/schedules run across all MUs in a BU simultaneously

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Navigation

Admin → Workforce Management → Business Units OR Admin → Workforce Management → Management Units

Business Units Overview

In workforce management, business units enable customers to organize their agents and leverage permissions to meet business needs. Business units allow customers to configure agents who share queues into more than one management unit. The agent capacity for management unit is 1,500 agents; however, business units help alleviate this limitation by providing support for up to 5,000 agents per business unit.

Business units enable cross-management unit scheduling and forecasting within the same business unit. Forecasts and schedules run at the business unit level, and administrators can create the most efficient schedules by factoring in coverage from all agents in more than one management unit within the business unit.

Business Unit Characteristics

- **Agent Capacity**: Max 5,000 agents per business unit
- **Forecast Scope**: Entire BU (all MUs included)
- **Schedule Scope**: Entire BU (all MUs included)
- **One Master Schedule**: Only one active master schedule per BU at a time
- **Time Zone**: Default time zone set at BU level (applies to all MUs)
- **Week Start Day**: Set at BU level (applies to all sites)
- **Common Objective**: Group MUs that share operational objectives

Business Unit Use Cases

- **Geographically dispersed sites** - Multiple locations serving same function
- **Skill-based organization** - Different teams with complementary skills
- **Multi-shift operations** - 24/7 coverage across multiple time zones
- **Blended internal/outsourced** - Internal staff + third-party partners
- **Virtual operations** - Remote work + office-based agents
- **Growth planning** - Prepare for future headcount expansion

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Management Units Overview

Management Units are groups of agents within a business unit. They can represent a department, site, or geographic location within the same business unit. Management units provide organizational flexibility and permission boundaries.

Management Unit Characteristics

- **Agent Capacity**: Max 1,500 agents per management unit
- **Purpose**: Represent dept/site/location within BU
- **Permissions**: Local control of time-off, team management
- **Organization**: Agents grouped for local management
- **Flexibility**: Multiple MUs per BU enable large-scale operations
- **Cross-MU Work**: Agents in different MUs can share queues/skills

Management Unit Use Cases

- **Site-based organization** - Each office location = 1 MU
- **Department organization** - Support/Sales/Billing each = 1 MU
- **Shift-based organization** - Morning/Evening/Night shift = 1 MU
- **Skill-based teams** - Technical/Billing/Sales each = 1 MU
- **Outsourced partners** - Third-party vendor = 1 MU
- **Virtual agent groups** - Remote workers = 1 MU

Hierarchy Structure

```
Organizational Hierarchy Example:

Business Unit: North America (4,800 agents)
│
├─ Management Unit: New York Operations (1,200 agents)
│  ├─ Site: Manhattan (600 agents)
│  │  ├─ Team: Support Tier 1 (150 agents)
│  │  ├─ Team: Support Tier 2 (150 agents)
│  │  ├─ Team: Sales (150 agents)
│  │  └─ Team: Billing (150 agents)
│  │
│  └─ Site: Brooklyn (600 agents)
│     └─ 4 teams (150 each)
│
├─ Management Unit: Dallas Operations (1,200 agents)
│  ├─ Site: Downtown (600 agents)
│  └─ Site: Suburb (600 agents)
```

```
│
├─ Management Unit: Remote Operations (1,200 agents)
│   └─ Virtual site (1,200 remote agents)
│
└─ Management Unit: Outsourced Partners (1,200 agents)
    └─ Partner site (1,200 vendor agents)

Agent Distribution:
├─ MU1: 1,200 agents (25%)
├─ MU2: 1,200 agents (25%)
├─ MU3: 1,200 agents (25%)
├─ MU4: 1,200 agents (25%)
└─ Total BU: 4,800 agents (80% of 5,000 capacity)
```

Permission Model

Business Unit Level Permissions

Permissions granted at BU level apply to entire business unit:

- **Forecasting** - Create, edit, publish forecasts for all MUs
- **Schedule Generation** - Create schedules across all MUs
- **Service Goals** - Define service goals for BU
- **Planning Groups** - Create planning groups for BU
- **Reporting** - Cross-MU reports and analytics
- **Configuration** - BU-wide settings and policies

Management Unit Level Permissions

Permissions granted at MU level apply only to that MU:

- **Time-Off Approvals** - Approve time-off requests
- **Schedule Details** - View/edit MU-specific schedules
- **Team Management** - Manage teams within MU
- **Activity Configuration** - MU-specific activities
- **Reporting** - MU-only reports
- **Agent Management** - Add/remove agents from MU

Permission Matrix

Feature	BU Level	MU Level
Forecasting	✓ Full	✗ No
Schedule Generation	✓ Full	✗ No
Intraday Management	✓ Full	✓ View
Real-Time Adherence	✓ Full	✓ View
Time-Off Approvals	✗ No	✓ Full
Team Management	✗ Limited	✓ Full
Agent Assignment	✓ Full	✓ Limited
Reporting	✓ Full	✓ Limited
Configuration	✓ Full	✓ Limited

Capacity Planning

Agent Capacity Calculations

Example 1: Single MU Organization

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Business Unit: Small Contact Center
├─ Management Unit: Support (800 agents)
│  └─ Capacity Used: 800/1,500 (53%)
└─ Business Unit Total: 800/5,000 (16%)

Growth Plan:
├─ Year 1: Add 200 agents → 1,000 total
├─ Year 2: Add 300 agents → 1,300 total
└─ Year 3: Need to split → Create 2nd MU
```

Example 2: Multi-MU Organization

```
Business Unit: Enterprise Contact Center
├─ Management Unit 1: NYC (1,400 agents) - 93%
├─ Management Unit 2: Dallas (1,350 agents) - 90%
├─ Management Unit 3: Remote (1,200 agents) - 80%
```

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├─ Management Unit 4: Outsourced (950 agents) - 63%
└─ Business Unit Total: 4,900/5,000 (98%)

Challenge: Almost at BU capacity
Solution:
├─ Option 1: Create new BU for new location
├─ Option 2: Split existing MU to another BU
└─ Option 3: Reduce headcount in lowest-performing MU
```

Exceeding Capacity

If MU exceeds 1,500 agents:

- Cannot add more agents to that MU
- Must create new MU or split agents
- Requires reorganization of teams

If BU exceeds 5,000 agents:

- Cannot add more agents to that BU
- Must create new business unit
- Existing MUs remain operational but frozen

Configuration

Creating a Business Unit

1. Navigate to Admin → Workforce Management → Business Units
2. Click Create Business Unit
3. Configure:
   - **Name** - Unique within WFM environment
   - **Time Zone** - Default for all sites
   - **Week Start Day** - Monday-Sunday default
   - **Data Aggregator** - Specify DA instance
   - **Stat Server** - Auto-populated from DA
   - **Tenant** - Genesys environment name
   - **Tenant Password** - Required for connection
4. Add Sites
   - Associate multiple sites if needed

    - Each site belongs to one MU
    - Sites can have multiple teams
5. Finalize and Save

Creating a Management Unit

1. Navigate to Admin → Workforce Management → Management Units
2. Click Create Management Unit
3. Configure:
    - **Name** - Unique within WFM
    - **Business Unit** - Select parent BU
    - **Description** - Optional (recommended)
    - **Team Structure** - Define teams if needed
4. Add Sites
    - Assign existing sites
    - Or create new sites
    - Max 1,500 agents per MU
5. Assign Agents
    - Add individual agents
    - Or bulk import from CSV
    - Set agent properties
6. Finalize and Save

Real-World Scenarios

Scenario 1: Scaling Beyond 1,500 Agents

Current State:

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Business Unit: Support Operations
└─ Management Unit: Support Team
   └─ 1,500 agents (at capacity)

New Hire Requirements: +200 agents needed
```

Solution: Split into Two MUs

```
Business Unit: Support Operations
├─ Management Unit: Support - Group A (1,350 agents)
│  └─ Location: NYC + Boston
├─ Management Unit: Support - Group B (1,200 agents)
│  └─ Location: Dallas + Remote
└─ Business Unit Total: 2,550/5,000 (51%)

Benefits:
├─ Accommodates growth
├─ Local team management at MU level
├─ Still shared forecasting/scheduling
└─ Room for future expansion
```

Scenario 2: Multi-Location Organization

Company Structure:

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Financial Services - 3,600 employees in support

Business Unit: Global Support
├─ Management Unit: North America (1,500)
│  ├─ Site: New York (750)
│  └─ Site: Dallas (750)
├─ Management Unit: Europe (1,200)
│  ├─ Site: London (600)
│  └─ Site: Dublin (600)
└─ Management Unit: Outsourced (900)
   └─ Site: Philippines (900)

Forecasting:
├─ Single global forecast across all 3 MUs
├─ Factors in time zone differences
├─ Optimizes scheduling for 24/7 coverage
└─ Published to master schedule covering all locations

Agent Movement:
├─ Can't move agents between MUs automatically
├─ Must manually reassign for temporary overflow
├─ Permanent transfers require admin action
```

Scenario 3: Outsourced Partner Integration

Setup:

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Business Unit: Multi-Channel Support (2,500 agents)
├─ Management Unit: Internal Team (1,500)
│  └─ Full control over scheduling/policies
├─ Management Unit: Outsourced Partner (1,000)
│  └─ Integrated into unified forecasting
└─ Benefits:
   ├─ Single forecast across internal + outsourced
   ├─ Unified scheduling window
   ├─ Coordinated service goals
   └─ Partner agents included in adherence

Challenges:
├─ Different contracts/rules per MU
├─ Partner availability limitations
├─ Communication across organizations
```

Best Practices

Organization Design

- **Right-size MUs** - Keep at 1,000-1,300 agents for growth room
- **Clear separation** - Align with business structure
- **Future-proof** - Plan for 2-3 years of growth
- **Skill groups** - Use for agent assignment, not org structure
- **Geographic logic** - Use locations/sites for MU boundaries

Permission Management

- **Principle of least privilege** - Grant only needed permissions
- **Role-based access** - Create roles for common scenarios

- **Audit regularly** - Review who has what access
- **Documentation** - Maintain permission matrix
- **Approval workflow** - Require BU-level for major changes

Agent Assignment

- **Consistent naming** - Use standard naming conventions
- **Skill accuracy** - Ensure skills match actual capabilities
- **MU assignment logic** - Clear criteria for placement
- **Cross-MU skills** - Agents can have skills across queues
- **Regular audits** - Verify assignment accuracy

Growth Planning

- **Capacity monitoring** - Track MU usage quarterly
- **Headcount forecasts** - Plan additions in advance
- **Reorganization planning** - Prepare for splits/merges
- **Communication** - Inform stakeholders of changes
- **Test in non-prod** - Always validate changes first

Common Issues & Solutions

Issue	Cause	Solution
Can't add agent to MU	MU at 1,500 limit	Create new MU or split existing
Schedule won't generate	Agents in multiple MUs missing	Ensure all agents properly assigned
Permission denied for forecast	Not BU-level permission	Grant Forecast permission at BU level
Agents can't trade across MUs	Not configured	Enable cross-MU trading in settings
Time-off approval pending	Wrong approval level	Ensure MU-level approver assigned
Wrong time zone	Inherited from parent	Change at BU level or override at Site

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Interview Cheat Sheet

Question	Answer

What's a Business Unit?	Group of MUs sharing operational objectives, max 5,000 agents
What's a Management Unit?	Sub-unit within BU representing dept/site/location, max 1,500 agents
How does hierarchy work?	BU → MU → Site → Team → Agent
Where are forecasts created?	Business Unit level (includes all MUs)
Where are schedules created?	Business Unit level (includes all MUs)
What permissions at BU level?	Forecasting, scheduling, service goals, reporting
What permissions at MU level?	Time-off approvals, team management, local scheduling
Can agents work across MUs?	Yes, if they have required skills for queues
Can one agent be in two MUs?	No, each agent assigned to one MU only
Max agents per BU?	5,000 agents
Max agents per MU?	1,500 agents
How many master schedules per BU?	One active master schedule per BU
How to handle growth over 1,500?	Create additional MU within same BU
How to exceed 5,000 agents?	Create new business unit
Can MUs share queues?	Yes, agents across MUs can handle same queues

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Key Takeaways

- **Hierarchical Organization** - BU organizes multiple MUs for shared forecasting
- **Capacity Planning** - 5,000 agents per BU, 1,500 per MU
- **Unified Forecasting** - Single forecast across all MUs in BU
- **Unified Scheduling** - One master schedule for entire BU
- **Permission Boundaries** - BU level for strategic, MU level for operational
- **Scalability** - Split MUs when exceeding 1,500 agents
- **Flexibility** - Agents can work across MUs if skilled
- **Management Clarity** - Clear org structure for delegation
- **Growth-Ready** - Design with future expansion in mind
- **Cross-MU Optimization** - Forecasting balances coverage across locations

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Additional Resources

Official Documentation

- Business Units: help.genesys.cloud/articles/business-units-overview/
- Management Units: help.genesys.cloud/articles/management-units-overview/
- WFM Configuration: help.genesys.cloud/articles/workforce-management-and-divisions-overview/
- Permissions: help.genesys.cloud/articles/workforce-management-permissions/

Support & Training

- Genesys University: genesys.com/training
- Community Forums: https://community.genesys.com
- Technical Support: https://support.genesys.com

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