

Capacity Planning

Genesys WFM Capacity Planning Documentation

Study Notes

Topic	Description
Capacity Planning	Long-range 2-year staffing forecasts and hiring needs
Hiring Plans	Project required agents based on volume growth
Shrinkage Modeling	Account for breaks, absences, training, meetings
Attrition Planning	Factor in turnover rates (typical 10-15% annual)
FTE Calculation	Full-time equivalent staffing requirements
What-If Scenarios	Model multiple growth/demand scenarios
Multi-Skill Planning	Plan for multiple planning groups and skill sets
Business Unit Level	Create capacity plans per business unit

Navigation

Admin → Workforce Management → Capacity Planning OR Menu → Workforce Management → Planning → Capacity Plans

Capacity Planning Overview

Capacity Planning enables organizations to forecast long-range (up to 2 years) staffing needs based on projected demand, anticipated shrinkage, and expected attrition. It answers the strategic question: "How many agents do we need to hire in the next 6-12-24 months?"

Capacity Planning functions:

- Project future staffing requirements
- Model growth scenarios
- Account for turnover and attrition
- Plan hiring timelines
- Determine training needs
- Support budget planning
- Enable proactive recruitment

Capacity Planning Process

Capacity Planning Workflow:

Input Phase:

- ├ Volume Forecast (2 years forward)
- ├ Service Level Goals
- ├ Average Handle Time (AHT)
- ├ Shrinkage Rate (% unavailable)
- ├ Attrition Rate (% turnover)
- └ FTE Targets (if applicable)

Processing:

- ├ Calculate staffing needed by period
- ├ Apply shrinkage adjustments
- ├ Apply attrition (turnover) adjustments
- ├ Factor in training ramp-up time
- └ Model multiple scenarios

Output Phase:

- ├ Hiring requirements by month
- ├ Training schedule
- ├ Budget projections
- ├ Risk identification
- ├ Recommendation scenarios
- └ Long-term staffing plan

Usage:

- └ HR coordinates recruitment
- └ Budget allocates hiring resources
- └ Training schedules onboarding
- └ Leadership makes staffing decisions
- └ Ongoing refinement based on actuals

Key Concepts

Staffing Calculation Formula

Basic Staffing Calculation:

$$\text{Staffing Required} = (\text{Volume} \times \text{AHT}) / \text{Available Hours}$$

Example:

- └ Volume: 5,000 calls/day
- └ AHT: 300 seconds (5 minutes)
- └ Target SL: 80% in 20 seconds
- | └ Staffing calculation: $(5,000 \times 300) / 3,600 = 416.67$ agent-hours needed
- |
- └ Workday: 8 hours (28,800 seconds available per agent)
- └ Agents needed: $416.67 \div 8 = 52.08$ agents
- └ Rounded: 52-53 agents minimum for stated conditions

Advanced Calculation (with shrinkage):

$$\text{Staffing Required} = ((\text{Volume} \times \text{AHT}) / \text{Available Hours}) \times (1 / (1 - \text{Shrinkage Rate}))$$

With 30% Shrinkage:

- └ Base staffing: 52 agents
- └ Shrinkage factor: $1 / (1 - 0.30) = 1.43$
- └ Total staffing needed: $52 \times 1.43 = 74.36$ agents
- └ Actual: 75 agents (accounting for shrinkage)

Shrinkage

Shrinkage represents the percentage of time agents are unavailable for customer work.

Shrinkage Components (Typical 25-35%):

Paid Time Off:

└ Vacation: 2.5% (20 days ÷ 260 work days)

└ Sick Leave: 1.5% (12 days ÷ 260)

└ Personal Time: 1% (8 days ÷ 260)

└ Subtotal: ~5%

Scheduled Non-Work:

└ Breaks: 8% (2 × 15 min breaks per 8-hr shift)

└ Lunch: 12% (1 hour per 8-hr shift)

└ Subtotal: ~20%

Other Non-Productive:

└ Meetings: 2%

└ Training: 2%

└ Administrative: 1%

└ Unplanned absences: 2%

└ Subtotal: ~7%

Total Shrinkage: ~32% (typical)

This means:

└ 8-hour shift = 5.44 hours available for customer work

└ OR you need 1.47 agents for every 1 customer-facing agent needed

Attrition (Turnover)

Attrition is the rate at which employees leave the organization.

Typical Contact Center Attrition: 10-20% annually

Attrition Impacts:

Monthly Impact Example (100 agents, 15% annual):

- └ 15% ÷ 12 = 1.25 agents/month turnover
- └ Planning for 12 months: 15 agents departing
- └ To maintain 100 agents: Must hire 15 new agents

With Growth (5% growth + 15% turnover):

- └ Current: 100 agents
- └ Target: 105 agents (5% growth)
- └ Turnover expected: 15 agents
- └ Total to hire: $105 - 100 + 15 = 20$ agents
- └ Hiring rate: 1.67 agents/month
- └ Timeline: 12 months to recruit and train

Factors Affecting Attrition:

- └ Compensation levels
- └ Work environment quality
- └ Career development opportunities
- └ Schedule flexibility
- └ Work-life balance
- └ Management quality
- └ Job satisfaction
- └ Industry benchmarks

Capacity Plan Creation

Creating a Capacity Plan

Step 1: Define Planning Parameters

Period Definition:

- └ Start Date: January 1, 2026
- └ End Date: December 31, 2027 (24 months)
- └ Intervals: Monthly
- └ Business Unit: Select target BU

Step 2: Input Volume Forecast

Volume Projections:

- └ Month 1: 5,000 calls/day (baseline)
- └ Month 2: 5,100 calls/day (+2%)
- └ Month 3: 5,200 calls/day (+4% YoY)
- └ ... (continue for 24 months)
- └ Can import from existing forecasts or enter manually

Step 3: Configure Service Levels

Service Goals:

- └ Service Level: 80% in 20 seconds
- └ ASA: 18 seconds
- └ Abandon Rate: 5%
- └ AHT: 300 seconds (5 minutes)
- └ Apply to all planning groups or specific ones

Step 4: Set Staffing Parameters

Shrinkage & Attrition:

- └ Shrinkage Rate: 30%
- └ Attrition Rate: 15% annually (1.25% monthly)
- └ Training Ramp-Up: 60% productivity week 1, 80% week 2, 100% week 3
- └ Training Duration: 2 weeks
- └ Seasonal Adjustments: Higher in Q4, lower in Q1

Step 5: Configure Planning Groups

Multi-Skill Planning:

- └ Planning Group 1: Voice Support (60% of volume)
- └ Planning Group 2: Email Support (40% of volume)
- └ Planning Group 3: Chat (optional blended group)
- └ Staffing Groups: Can map multiple skills to handle

Step 6: Review Calculations

System Calculates:

- └ Monthly staffing requirements
- └ Hiring needs accounting for attrition
- └ Training schedule and capacity
- └ Budget impact

- └ FTE projections
- └ Multi-skill distribution
- └ Over/under-staffing risks

Step 7: Scenario Analysis

Create What-If Scenarios:

- └ Copy existing plan
- └ Adjust variables:
 - | └ Modify volume forecast (+/- %)
 - | └ Adjust SL targets
 - | └ Change attrition assumptions
 - | └ Update shrinkage rates
- └ Compare scenarios
- └ Select recommended plan

Real-World Examples

Example 1: Growth Planning (30% Growth Over 12 Months)

Current State (Jan 2026):

- └ Headcount: 100 agents
- └ Daily Volume: 5,000 calls
- └ SL: 80%
- └ Annual Attrition: 15%

Growth Forecast:

- └ Q1: +5% volume (5,250 calls)
- └ Q2: +10% volume (5,500 calls)
- └ Q3: +20% volume (6,000 calls)
- └ Q4: +30% volume (6,500 calls)

Capacity Plan Calculation:

Month 1 (Jan):

- └ Volume: 5,000 calls/day
- └ Staffing needed: 75 (including 30% shrinkage)
- └ Current staff: 100
- └ Status: Over-staffed (+25)

Month 3 (Mar):

- └ Volume: 5,250 calls/day (+5%)
- └ Staffing needed: 79
- └ Attrition: 1.25 agents/month = 3.75 to date
- └ Current staff: 96
- └ Status: Over-staffed, but shrinking

Month 6 (Jun):

- └ Volume: 5,500 calls/day (+10%)
- └ Staffing needed: 83
- └ Attrition YTD: 7.5 agents
- └ Current staff: 92
- └ Status: At capacity

Month 12 (Dec):

- └ Volume: 6,500 calls/day (+30%)
- └ Staffing needed: 98
- └ Attrition YTD: 15 agents
- └ Total to hire: $(98 - 100) + 15 = +13$ agents
- └ Current staff with hires: 113
- └ Status: Meeting demand

Hiring Plan:

- └ Month 1-2: No hiring (use excess)
- └ Month 3-4: Begin recruiting (start with 2-3/month)
- └ Month 5-8: Accelerate hiring (5/month)
- └ Month 9-12: Intensive hiring (4/month)
- └ Total new hires: 28 agents
- └ Training cohorts: 4 groups of 7 agents
- └ Training timeline: 2-week program per cohort

Budget Impact:

- └ Current salary cost: \$4.8M/year (100 × \$48k)

- └ Additional 13 agents: +\$624K/year
- └ Training cost: $28 \times \$2,000 = \$56K$
- └ Equipment/setup: $28 \times \$500 = \$14K$
- └ Total additional cost: ~\$694K over 12 months

Example 2: Scenario Planning (High vs Low Growth)

Base Scenario: 15% Growth

- └ Jan: 5,000 calls/day
- └ Dec: 5,750 calls/day
- └ Staffing Jan: 75 agents
- └ Staffing Dec: 87 agents
- └ Hiring needed: 15 agents (net of attrition)
- └ Annual cost increase: \$720K

Aggressive Scenario: 25% Growth

- └ Jan: 5,000 calls/day
- └ Dec: 6,250 calls/day
- └ Staffing Jan: 75 agents
- └ Staffing Dec: 94 agents
- └ Hiring needed: 22 agents (net of attrition)
- └ Annual cost increase: \$1,056K

Conservative Scenario: 5% Growth

- └ Jan: 5,000 calls/day
- └ Dec: 5,250 calls/day
- └ Staffing Jan: 75 agents
- └ Staffing Dec: 79 agents
- └ Hiring needed: 8 agents (net of attrition)
- └ Annual cost increase: \$384K

Comparison:

- └ Cost Range: \$384K to \$1,056K
- └ Headcount Range: 8 to 22 new hires
- └ Timing Impact: Early hires for high growth, delayed for conservative
- └ Recommendation: Plan for base case, stay flexible for scenarios

Example 3: Multi-Skill Planning

Scenario: Voice + Email Blended Team

Planning Group Distribution:

- └ Voice Support: 60% of workload
- └ Email Support: 40% of workload
- └ Single agent team handling both

Staffing Calculation:

Voice Staffing:

- └ Volume: 3,000 calls/day
- └ AHT: 300 seconds
- └ Base: 45 agents (with shrinkage)

Email Staffing:

- └ Volume: 2,000 emails/day
- └ AHT: 600 seconds
- └ Base: 30 agents (with shrinkage)

Blended Approach (Single Planning Group):

- └ Combined workload: $45 + 30 = 75$ agent-hours
- └ Blended team: 60 agents (20% efficiency gain)
- └ Staffing needed: 60 agents (vs 75 separate)
- └ Savings: 15 agents / \$720K annually

Requirements:

- └ All 60 agents trained in voice
- └ All 60 agents trained in email
- └ Ability to switch between during shift
- └ Proper activity coding for tracking
- └ Balanced workload distribution
- └ Adequate systems for both channels

Benefits:

- └ Cost savings: 20% staffing reduction
- └ Flexibility: Can shift agents to high-demand channel
- └ Agent satisfaction: Work variety

└ Efficiency: Prevents over-staffing one channel

└ Resilience: Handle channel imbalances

Best Practices

Forecasting Accuracy

- **Use Historical Data** - ABM requires 90+ days minimum
- **Account for Seasonality** - Q4 peaks, Q1 valleys typical
- **Plan for Growth** - Include business growth plans
- **Conservative Approach** - Better to over-hire than under-staff
- **Ongoing Refinement** - Adjust monthly based on actuals
- **Scenario Planning** - Model multiple growth scenarios

Hiring & Training

- **Lead Time** - Start recruiting 3-6 months before need
- **Batch Training** - Group new hires into cohorts
- **Ramp-Up Plan** - Account for 2-4 week productivity ramp
- **Retention Focus** - Lower attrition through engagement
- **Budget Planning** - Include hiring and training costs
- **Skill Planning** - Ensure multi-skill coverage

Staffing Decisions

- **Monitor Actuals** - Track actual vs planned monthly
- **Adjust Early** - Don't wait for crisis to hire
- **Communicate** - Keep HR and leadership informed
- **Flexibility** - Plan for contingencies
- **Cost Control** - Balance service level with cost
- **Continuous Improvement** - Review and refine quarterly

Interview Cheat Sheet

Question	Answer
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What's capacity planning?	Long-range (2-year) workforce staffing forecasts
Why capacity planning?	Project hiring needs months in advance
Key inputs?	Volume forecast, SL goals, AHT, shrinkage, attrition
What's shrinkage?	% unavailable time (breaks, meetings, training ~30%)
What's attrition?	Employee turnover rate (typical 10-20% annually)
How calculate staffing?	$(\text{Volume} \times \text{AHT}) / \text{Available Hrs} \times (1 / (1 - \text{Shrinkage}))$
Planning horizon?	Up to 2 years forward
FTE?	Full-time equivalent (one agent = 1 FTE)
Multi-skill planning?	Plan for agents handling multiple channels
What-if scenarios?	Model high/low growth alternatives
Training ramp-up?	New agents reach 100% productivity over 2-4 weeks
Hiring timeline?	Start recruiting 3-6 months before need
Cost calculation?	Salary + benefits + training + equipment
Over-staffing issue?	Wasted labor cost, low occupancy
Under-staffing issue?	Service level failure, agent burnout

Key Takeaways

- **Strategic Planning** - Look ahead 2 years for staffing
- **Growth Alignment** - Match hiring to business growth
- **Turnover Factor** - Account for normal attrition rates
- **Shrinkage Modeling** - Realistic availability calculations
- **FTE Tracking** - Monitor full-time equivalent staffing
- **Scenario Flexibility** - Plan for multiple growth paths
- **Lead Time** - Start recruiting before you need agents
- **Cost Planning** - Budget hiring and training expenses
- **Multi-Skill** - Plan for blended team capabilities
- **Continuous Refinement** - Adjust monthly based on actuals

Additional Resources

Official Documentation

- Capacity Plans: help.mypurecloud.com/articles/capacity-plans-overview/
- Planning: help.genesys.cloud/articles/plan-workforce-management/
- Staffing: help.genesys.cloud/articles/about-workforce-management/

Support & Training

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