

Intraday Management

Genesys WFM Intraday Management Documentation

Study Notes

Topic	Description
Intraday Management	Real-time monitoring of contact center performance
Performance Views	Summarized and detailed grid displays of metrics
Metrics	Volume offered, AHT, service level, staffing, adherence
Activity Codes	Map agent states to schedule states
Thresholds	15, 30, or 60-minute monitoring intervals
Real-Time Adjustments	Add/remove agents, modify activities on-the-fly
What-If Analysis	Project impact of staffing changes

Navigation

Menu → Workforce Management → Performance → Intra-Day OR Supervisor → Performance → Intraday Monitoring

Intraday Management Overview

Intraday Management is the real-time monitoring and adjustment of contact center operations throughout the day. It compares actual performance against forecasted expectations, enabling supervisors to make data-driven decisions about agent staffing, activity assignments, and schedule adjustments in response to fluctuating demand.

Intraday Management allows supervisors to:

- Monitor real-time performance metrics
- Compare actual vs forecasted volumes and AHT
- Identify service level risks
- Add or remove agents from activities
- Make schedule adjustments for unexpected demand
- Project impact of staffing changes
- Maintain service level targets

Intraday Management Objectives

- **Performance Tracking** - Monitor actual vs forecast
- **Risk Detection** - Identify service level at risk
- **Quick Response** - Make rapid staffing adjustments
- **Data-Driven Decisions** - Use metrics to guide choices
- **Service Level Maintenance** - Protect SL targets
- **Cost Optimization** - Minimize unnecessary overtime
- **Workload Balancing** - Redistribute work as needed

Key Metrics Monitored

Real-Time Intraday Metrics:

Current (Actual):

- └ Interaction Volume (Offered)
- └ Average Handle Time (AHT)
- └ Service Level % (achieved)
- └ Average Speed to Answer (ASA)
- └ Abandon Rate %
- └ Agents on Queue
- └ Occupancy %
- └ Interactions Handled

Forecasted (Predicted):

- └ Expected Volume (remainder of day)

- └ Projected AHT
- └ Predicted Service Level
- └ Staffing Requirements
- └ Expected ASA
- └ Coverage Gap Analysis

Variance Analysis:

- └ Volume Variance (Actual vs Forecast)
- └ AHT Variance
- └ Service Level Status (On Track/At Risk/Critical)
- └ Staffing Gap (Over/Under)
- └ Trend Direction (↑ improving / ↓ declining)

Performance Intraday View

The Intraday View displays real-time and forecasted performance metrics in a detailed grid format, updated continuously throughout the day.

Intraday View Structure:

Performance Intraday View Grid:

Time Step	Offered	AHT	SL %	ASA	Agents	Status
08:00-09:00	45	280s	82%	18s	6	✓ On Track
09:00-10:00	68	290s	79%	22s	8	✓ On Track
10:00-11:00	95	310s	75%	28s	11	⚠ At Risk
11:00-12:00	88	305s	77%	26s	10	⚠ At Risk
12:00-13:00	52	270s	85%	16s	6	✓ On Track
13:00-14:00	65	285s	81%	20s	8	✓ On Track
14:00-15:00	72	300s	78%	24s	9	⚠ At Risk
15:00-16:00	58	295s	80%	21s	7	✓ On Track

Legend:

- ✓ On Track = SL within 2-3% of goal (goal 80%)
- ⚠ At Risk = SL within goal but trending down, or 1-2% below goal
- ☐ Critical = SL >2% below goal, immediate action needed

Current Status (as of 13:15):

- └ Offered Today: 543 calls
- └ Average AHT: 292 seconds
- └ Current SL: 79.5%
- └ Service Goal: 80%
- └ Status: On Track (within acceptable range)

View Refresh Intervals:

- **15-minute intervals** - Most frequent, impacts system performance
- **30-minute intervals** - Balanced (recommended)
- **60-minute intervals** - Less frequent, lower system impact

Data Display Options:

- **Summarized View** - High-level overview by hour
- **Detailed View** - Granular metrics with all statistics
- **Graphical View** - Charts showing trends over time

Real-Time Metrics

Interaction Volume (Offered)

Definition: Total number of interactions offered to the contact center

How Calculated:

- └ Sum of all inbound interactions (calls, emails, chats, etc.)
- └ Per time interval
- └ Across selected planning group(s)
- └ Real-time count + forecast for remainder of day

Example:

- └ 10:00-10:15: 25 calls offered
- └ 10:15-10:30: 28 calls offered
- └ 10:30-10:45: 22 calls offered
- └ 10:45-11:00: 20 calls offered
- └ Hour Total: 95 calls offered

Variance from Forecast:

- └ Forecasted: 92 calls
- └ Actual: 95 calls
- └ Variance: +3 (3.3% higher than forecast)

Average Handle Time (AHT)

Definition: Average duration of each interaction (call, email, chat)

Components:

- └ Talk Time (conversation)
- └ Hold Time (customer on hold)
- └ After Call Work (processing after call)
- └ Wrap-up Time (notes, documentation)

Example (Voice Interactions):

- └ Call 1: 5 min 30 sec
- └ Call 2: 4 min 45 sec
- └ Call 3: 6 min 15 sec
- └ Call 4: 5 min 00 sec
- └ Average: 5 min 22 sec (322 seconds)

Variance Tracking:

- └ Forecasted AHT: 300 seconds (5 min)
- └ Actual AHT: 322 seconds (5:22)
- └ Variance: +22 seconds (+7.3% higher)
- └ Impact: Requires more agents for same volume

Service Level (SL)

Definition: % of interactions answered within target time

Calculation:

- └ Target: 80% of calls answered in 20 seconds
- └ Actual: 82% of calls answered in 20 seconds
- └ Status: ✓ Exceeding target

Examples:

- └ 1,000 calls offered
- └ 800 calls answered ≤ 20 seconds
- └ 200 calls answered > 20 seconds
- └ SL = $(800/1000) \times 100 = 80\%$ ✓ Target met

Real-Time Example:

- └ Hour 10:00-11:00
- └ Offered: 95 calls
- └ Answered ≤ 20 s: 71 calls
- └ Answered > 20 s: 24 calls
- └ SL: $(71/95) \times 100 = 74.7\%$
- └ Goal: 80%
- └ Status: \triangle Below target (5.3% gap)

Average Speed to Answer (ASA)

Definition: Average time from call offered to agent answer

Calculation:

- └ Sum of all answer wait times
- └ Divided by number of answered calls
- └ Result in seconds

Example:

- └ Call 1: 12 seconds wait
- └ Call 2: 18 seconds wait
- └ Call 3: 25 seconds wait
- └ Call 4: 22 seconds wait
- └ Average: $(12+18+25+22) / 4 = 19.25$ seconds ≈ 19 s

Relationship to Service Level:

- └ SL: 80% in 20 seconds = at least 80% ≤ 20 s
- └ ASA: 19 seconds = average across all calls
- └ Both track speed, different perspectives
- └ SL is goal-focused, ASA is performance-focused

Real-Time Adjustments

Adding Agents to Activity

Scenario: Service level dropping (75% vs 80% goal), trend declining

Step 1: Identify Risk

- └ Monitoring shows SL at 75% (below 80% goal)
- └ Trend shows -2% per 15 minutes
- └ Current staffing: 8 agents on support queue
- └ Remaining shift: 3 hours

Step 2: Analyze Options

- └ Option A: Pull 2 agents from lower-priority activity
- └ Option B: Authorize overtime for available agents
- └ Option C: Use on-call backup agents
- └ Decision: Option A (least cost impact)

Step 3: Make Adjustment

- └ Modify schedule manually
- └ Assign 2 agents from "Idle" activity to "Support"
- └ Update system in real-time
- └ Effect: Immediate

Step 4: Monitor Impact

- └ Next 15 minutes: SL improves to 78% (trend reversed)
- └ Next 30 minutes: SL reaches 81% (goal achieved)
- └ After 1 hour: Decision made to keep additional agents

Step 5: Cleanup

- └ Removed agents: Return to original activity
- └ Overtime: Document and approve as needed
- └ Analysis: Record what worked for future reference

Modifying Activity Assignments

Scenario: Email queue backing up, response times extending

Current State:

- └ Email queue: 250 emails waiting
- └ Average response time: 2.5 hours
- └ Goal: 1.5 hours response
- └ Staffing: 4 agents on email

Decision: Temporarily assign chat agents to email

Action:

- └ Identify 2 available chat agents
- └ Reassign to email activity
- └ Update their work assignment in real-time
- └ System recalculates workload

Result:

- └ Email staffing: 4 → 6 agents
- └ Queue starts processing faster
- └ Response time improves to 1.8 hours
- └ Chat queue slightly longer but acceptable

Reversal:

- └ When email clears, chat agents reassigned
- └ Return to normal staffing model

Schedule Intraday Rebuild

WFM can regenerate schedules for specific days based on updated demand:

Use Case: Unexpected surge in volume

Morning (09:00):

- └ Forecast: 2,000 calls for day
- └ Actual by 09:30: 500 calls already (ahead of pace)
- └ New projection: 3,000 calls (50% surge)
- └ Current schedule: Insufficient

Action: Intraday Schedule Rebuild

- └ Select days: Today (rest of day)
- └ Recalculate staffing: Based on new forecast

- └ Generate new schedule: For current time forward
- └ Adjust Agent assignments: For remainder of shift
- └ Publish changes: To affected agents

Result:

- └ Schedule optimized for actual demand
- └ Additional agents added to peak periods
- └ Prevents service level failure
- └ Agents notified of schedule changes

What-If Analysis

The What-If calculator allows supervisors to project impact of staffing changes before implementing them.

What-If Process:

Current State:

- └ Volume offered: 95 calls/hour
- └ AHT: 300 seconds
- └ Staffing: 10 agents
- └ Projected SL: 81%

Question: What if we add 2 more agents?

What-If Calculation:

- └ Input: Staffing = 12 agents (instead of 10)
- └ Calculate new SL: 87%
- └ Calculate new ASA: 15 seconds (instead of 18)
- └ Calculate new occupancy: 72% (instead of 80%)

Question: What if volume increases 20%?

What-If Calculation:

- └ Input: Volume = 114 calls/hour (95×1.2)
- └ Calculate new SL: 76% (with 10 agents)
- └ Calculate new ASA: 23 seconds
- └ Calculate new occupancy: 95%

Conclusion:

- └ Need to add 3-4 agents to maintain SL
- └ 20% volume increase requires ~30% staffing increase

What-If Variables:

- Staffing levels (agents on activity)
- Interaction volume (offers per hour)
- Average handle time (seconds per interaction)
- Service level goal (% in seconds)
- Occupancy target
- Shrinkage rate

Activity Code Management

Activity codes map agent states to schedule states for adherence and reporting. They represent what agents are doing at any given time.

Common Activity Codes:

On-Queue Activities (Customer-Facing):

- └ Inbound Call - handling incoming calls
- └ Inbound Email - responding to emails
- └ Inbound Chat - managing chat conversations
- └ Outbound Call - making outbound calls
- └ Callback - handling scheduled callbacks
- └ Workitem - handling task-based work
- └ Multi-Activity - performing multiple types

Off-Queue Activities (Non-Customer):

- └ Break - scheduled break time
- └ Meal - lunch or meal period
- └ Training - formal training session
- └ Meeting - team or coaching meeting
- └ Administrative - paperwork, documentation
- └ Idle - waiting for next interaction
- └ After Call Work - call follow-up work
- └ Time Off - approved absence

Special Activities:

- └ Exception - unscheduled activity
- └ Overtime - additional hours
- └ Shift Trade - schedule swap
- └ Unavailable - temporarily not available
- └ Coaching - one-on-one coaching session
- └ Quality - call monitoring

Activity Code Mapping:

Schedule State Group: On-Queue Voice

Maps to Real-Time States:

- └ WaitingForNextCall → Idle/Available
- └ Connected → Connected/Call
- └ Held → Held/Call
- └ AfterCallWork → ACW/Post-Call
- └ Reason Codes:
 - └ "C100": Connected call
 - └ "BRK": Break (if mapped)
 - └ "TRN": Training (if mapped)

For Adherence:

- └ Agent scheduled: On-Queue Voice 10:00-15:00
- └ Agent actual: Connected (Connected call)
- └ Mapping: Connected maps to On-Queue ✓ Adherent
- |
- └ Agent actual: Break (taking break)
- └ Mapping: Break mapped to On-Queue? If yes ✓ Adherent
- |
- └ If no ✗ Non-adherent

Monitoring Views

Summary View (By Time Interval)

Hourly Summary View - Support Planning Group

Hour | Offered | AHT | SL % | Staffing | Occupancy | Status

Hour	Offered	AHT	SL %	Staffing	Occupancy	Status
08:00-09	42	280s	84%	5	68%	✓ Good
09:00-10	68	290s	81%	8	79%	✓ Good
10:00-11	95	310s	75%	11	87%	△ Risk
11:00-12	88	305s	77%	10	85%	△ Risk
12:00-13	52	270s	86%	6	62%	✓ Good
Daily Avg	349	293s	80.6%	8	76%	✓ On Target

Detailed View (By Agent)

Agent-Level Intraday View - Current Time 14:30

Agent Name | Activity | Duration | SL Target | Status | Notes

Agent Name	Activity	Duration	SL Target	Status	Notes
Agent_001	Connected	4:23	Speaking	✓ OK	Handling call
Agent_002	ACW	1:05	After CW	✓ OK	Wrapping up
Agent_003	Available	0:00	Available	✓ OK	Ready for next
Agent_004	Break	8:30	On Break	✓ OK	Scheduled break
Agent_005	Connected	5:47	Speaking	△ Long	Extended call
Agent_006	Training	1:15:00	Training	✓ OK	Product training
Agent_007	Off	OFF	Time Off	✓ OK	Approved absence
Agent_008	Idle	2:15	Available	✓ OK	In queue

Summary:

- └ Agents Available: 3
- └ Agents Connected: 2
- └ Agents Off-Queue: 3
- └ Total Team: 8 agents

Performance Scenarios

Scenario 1: Volume Spike

Tuesday 11:00 AM - Unexpected Surge

Timeline:

10:00:

- └ Forecasted: 85 calls this hour
- └ Actual: 82 calls (on track)
- └ SL: 81%
- └ Staffing: 10 agents

10:30: Alert! Volume Spike Detected

- └ Trend: +35% above forecast
- └ Current: 60 calls in 30 min (120/hour pace)
- └ Projected: 115 calls for 11:00 hour
- └ Impact: SL likely to drop to 72% (below 80% goal)

11:00: Supervisor Takes Action

- └ Analysis: Need +3 agents to maintain SL
- └ Action: Pull 2 agents from email queue + 1 from callback
- └ New Staffing: 13 agents on support
- └ Notify agents: Immediate activity change
- └ Update schedule: Reflect change

11:30: Monitor Impact

- └ Actual: 118 calls for hour (matched projection)
- └ SL achieved: 79.5% (close to goal)
- └ Occupancy: 91% (high but acceptable)
- └ Status: ✓ Crisis averted

11:45: Plan Staffing Reversal

- └ Volume trend: Normalizing
- └ Project: Peak ending at 13:00
- └ Plan: Return agents to original activities at 13:15
- └ Communication: Notify agents of planned change

Result:

- └ Service level maintained through spike
- └ Agents reassigned with notice
- └ Customer experience protected

Scenario 2: Service Level Failure

Thursday 15:00 - Service Level Deteriorating

14:00:

- └ SL: 82%
- └ Trend: Stable
- └ Action: Monitor

14:15:

- └ SL: 81%
- └ Trend: -1%
- └ Action: Watch closely

14:30:

- └ SL: 80%
- └ Trend: -1%
- └ Action: Prepare contingency

14:45:

- └ SL: 78%
- └ Trend: Worsening
- └ Action: IMMEDIATE RESPONSE NEEDED

Analysis:

- └ Root Cause: 2 agents called in sick
- └ Current: 9 agents (down from scheduled 11)
- └ Current SL: 78%
- └ Needed SL: 80%
- └ Solution: Add 2-3 agents within 30 min

Options:

- └ A) Callback on-call agents (20 min lag)
- └ B) Offer voluntary overtime (immediate)
- └ C) Pull from other activities (immediate)
- └ Selected: A + C (both)

Action Taken:

- └ Authorize voluntary overtime (3 agents offered)
- └ Pull 1 agent from lower-priority activity
- └ Call on-call agent (ETA 20 min)
- └ Temporary staffing: 10 agents

Result by 15:30:

- └ Additional agent arrives
- └ Staffing: 12 agents
- └ SL recovers to 81%
- └ Goal achieved

Closeout:

- └ Paid overtime to 3 volunteers
- └ Approved additional staffing for rest of week
- └ Reviewed scheduling process for gaps
- └ Cost impact: ~\$400 additional labor

Best Practices

Real-Time Monitoring

- **Constant Vigilance** - Watch trends, not just snapshots
- **Threshold Management** - Set alerts for SL drop (e.g., -2%)
- **Trend Awareness** - Declining trends warrant early action
- **Granular Intervals** - 15-30 min intervals catch problems early
- **Regular Review** - Check every 15-30 minutes during peak

Decision Making

- **Data-Driven** - Use what-if calculator before acting
- **Proportional Response** - Match staffing change to demand
- **Communication** - Notify agents of changes promptly
- **Documentation** - Record actions and reasons
- **Learning** - Review decisions post-shift for improvement

Staffing Adjustments

- **Minimize Disruption** - Use lowest-impact sources first
- **Early Action** - Add agents before crisis, not during
- **Reversal Planning** - Plan removal of extra agents early
- **Cost Awareness** - Balance service vs overtime cost
- **Agent Care** - Provide notice of changes when possible

Interview Cheat Sheet

Question	Answer
What is intraday management?	Real-time monitoring and adjustment of operations
Key metrics monitored?	Volume, AHT, SL, ASA, abandon rate, occupancy
What's intra-day view?	Grid display of real-time and forecasted metrics
Monitor intervals?	15, 30, or 60-minute intervals
What's AHT?	Average handle time - duration per interaction
What's SL?	Service level - % answered within target time
What's ASA?	Average speed to answer - wait time average
What's occupancy?	% of time agents spend handling interactions
What-if calculator?	Projects impact of staffing/volume changes
Activity codes?	Map agent states (on-queue, break, etc.)
When add agents?	SL dropping, trend negative, volume spike
Intraday rebuild?	Regenerate schedule based on new demand
Real-time adjustment?	Reassign agents between activities immediately
Yellow/red status?	Yellow = non-adherent, Red = severely non-adherent
How respond to spike?	Monitor, calculate need, reassign agents

Key Takeaways

- **Real-Time Visibility** - Constant monitoring of actual vs forecast
- **Data-Driven Decisions** - Use metrics to guide staffing changes
- **Quick Response** - Make adjustments within minutes of risk detection

- **Service Protection** - Prevent SL failures before they occur
 - **What-If Planning** - Project impact before implementing changes
 - **Activity Flexibility** - Dynamically assign agents to needs
 - **Trend Awareness** - Declining trends warrant proactive action
 - **Communication** - Notify agents of changes promptly
 - **Cost Balance** - Optimize service level vs labor cost
 - **Continuous Learning** - Review and improve daily decisions
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Additional Resources

Official Documentation

- Intraday Monitoring: help.genesys.cloud/articles/intraday-monitoring-overview/
- Performance Views: all.docs.genesys.com/PEC-WFM/Current/Supervisor/PrfmIntrDyVw
- Activity Codes: help.genesys.cloud/articles/activity-codes-overview/

Support & Training

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