

# Service Goals & Planning Groups

## Genesys WFM Service Goals & Planning Groups Documentation

### Study Notes

Topic	Description
Service Goals	Define SL, ASA, abandon rate targets
Service Level	% of interactions answered within target time
ASA	Average Speed to Answer in seconds
Abandon Rate	% of offered interactions not answered
Planning Groups	Organize workload by media type and route
Media Types	Voice, email, chat, callback, messaging, workitems
Goal Templates	Reusable at business unit level
Staffing Impact	Goals drive forecasting and scheduling

### Navigation

# Service Goals Overview

Service Goals define target performance metrics for contact center operations. They specify acceptable levels for Service Level, Average Speed to Answer, and Abandon Rate, providing the basis for staffing forecasts and schedule creation.

## Goal Components

Service Goal: Premium Support Voice

Performance Targets:

- └ Service Level: 80% in 20 seconds
  - | └ 80% of calls answered within 20 seconds
- └ Average Speed to Answer: 18 seconds average
  - | └ All calls average 18 second wait
- └ Abandon Rate: 5% maximum
  - | └ Maximum 5% of calls not answered

Definition:

- └ Media Type: Voice (inbound)
- └ Planning Group: Support Queue 001
- └ Time Period: Monday-Friday, 08:00-18:00
- └ Applies To: All support agents
  - └ Level: Business Unit level

## Key Metrics

### Service Level (SL)

Definition: Percentage of calls answered within target time

Calculation:

- └ Offered: 1,000 calls

└ Answered  $\leq 20$  seconds: 800 calls

└ Answered  $> 20$  seconds: 200 calls

└ SL =  $(800/1,000) \times 100 = 80\%$

Benchmark:

└ Excellent: 90%+

└ Good: 80-90%

└ Acceptable: 75-80%

└ Poor:  $< 75\%$

## Average Speed to Answer (ASA)

Definition: Average wait time before agent answer

Calculation:

└ Call 1 wait: 12 seconds

└ Call 2 wait: 25 seconds

└ Call 3 wait: 18 seconds

└ Average:  $(12+25+18)/3 = 18.3$  seconds

Benchmark:

└ Excellent:  $< 10$  seconds

└ Good: 10-20 seconds

└ Acceptable: 20-30 seconds

└ Poor:  $> 30$  seconds

## Abandon Rate

Definition: Percentage of calls not answered

Calculation:

└ Offered: 1,000 calls

└ Answered: 950 calls

└ Abandoned: 50 calls

└ Abandon Rate =  $(50/1,000) \times 100 = 5\%$

Benchmark:

└ Excellent:  $< 3\%$

└ Good: 3-5%

└ Acceptable: 5-8%

# Goal Templates

Service Goal Templates are reusable at the Business Unit level, providing standard goals for different work types.

## Template Library:

### Template 1: Premium Support (Voice)

- └ Service Level: 80% in 20 seconds
- └ ASA: 18 seconds
- └ Abandon Rate: 5%
- └ Use Case: VIP customers, escalations
- └ Staffing Impact: High (expensive)

### Template 2: Standard Support (Voice)

- └ Service Level: 75% in 30 seconds
- └ ASA: 25 seconds
- └ Abandon Rate: 8%
- └ Use Case: Typical support queue
- └ Staffing Impact: Medium

### Template 3: Basic Support (Voice)

- └ Service Level: 70% in 60 seconds
- └ ASA: 45 seconds
- └ Abandon Rate: 10%
- └ Use Case: IVR escalations, callbacks
- └ Staffing Impact: Low (cost efficient)

### Template 4: Email Support

- └ Service Level: 95% in 4 hours
- └ ASA: 2 hours (median)
- └ Abandon Rate: N/A
- └ Use Case: Email queue
- └ Staffing Impact: Different (async work)

### Template 5: Chat Support

- └ Service Level: 85% in 30 seconds
- └ ASA: 20 seconds
- └ Abandon Rate: 7%
- └ Use Case: Real-time chat
- └ Staffing Impact: Medium-High

#### Template 6: Callback

- └ Service Level: 90% within 1 hour
- └ ASA: N/A (scheduled)
- └ Abandon Rate: <2%
- └ Use Case: Scheduled callbacks
- └ Staffing Impact: Planned

# Planning Groups Overview

Planning Groups organize workloads by media type and route path, enabling precise forecasting and scheduling for different work types.

## Planning Group Structure

### Planning Group: Support - Voice Queue 001

#### Organization:

- └ Name: Support - Voice Queue 001
- └ Business Unit: Support Operations
- └ Media Type: Voice (Inbound)
- └ Queue/Route: Support\_Queue\_001
- └ Service Goal: Premium Support
- └ Staffing Group: Support\_Agents\_Tier\_2

#### Configuration:

- └ Agent Skills Required: Support Level 2+
- └ Agents Available: 50
- └ Agent Availability: Scheduled
- └ Activity Code: SUPPORT\_VOICE
- └ Multi-Activity: Can blend with other activities

#### Scheduling:

- └ Work Plans: Standard Full-Time, Part-Time Flex
- └ Hours Available: 09:00-17:00 Mon-Fri
- └ Staffing Model: Load-based (forecast-driven)
- └ Peak Coverage: 10:00-14:00 (highest demand)

## Multi-Media Planning Groups

#### Planning Group 1: Blended Support (Voice + Email)

##### Media Types:

- └ Voice (Inbound) - 60% of time
- └ Email (Responses) - 40% of time
- └ Single planning group spans both

##### Service Goals:

- └ Voice: 80% SL, 20s ASA
- └ Email: 95% 4-hour response
- └ Blended staffing meets both

##### Agent Assignment:

- └ Agents skilled in both voice and email
- └ Can switch between during shift
- └ Occupancy: Total work load
- └ Adherence: Tracks combined

##### Benefits:

- └ Flexibility (switch between work types)
- └ Efficiency (right sizing)
- └ Cost effective (fewer agents needed)
- └ Better work variety

##### Example:

- └ Agent on call: 5 minutes (voice)
- └ Agent responds to emails: 2 minutes each (email)
- └ Total work + availability = occupancy

# Planning Group Creation Checklist

## Step 1: Define Fundamentals

- Planning Group Name
- Business Unit
- Media Type(s)
- Queue/Route Assignment
- Description & Purpose

## Step 2: Associate Service Goals

- Service Level %
- ASA Target
- Abandon Rate
- Performance Interval

## Step 3: Assign Resources

- Select Staffing Group
- Define Skill Requirements
- Specify Agent Availability
- Configure Blending (if multi-media)

## Step 4: Configure Scheduling

- Work Plans
- Available Hours
- Days Operational
- Staffing Flexibility

## Step 5: Test & Activate

- Validate skill assignments
- Test with sample forecast
- Confirm staffing calculations
- Activate for use

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# Goal Setting Best Practices

### SL Target Selection:

#### Considerations:

- └ Industry Standard: 80% for voice typical
- └ Customer Expectations: What do customers expect?
- └ Staffing Cost: Higher SL = more agents
- └ Competition: What competitors offer
- └ Current Performance: Realistic improvement path
- └ Business Objectives: Strategic alignment

#### Decision Matrix:

##### Volume Level | Industry SL | Typical SL | Cost Impact

Volume Level	Industry SL	Typical SL	Cost Impact
Low (<500/day)	80%	85-90%	-
Medium (500-2k)	80%	80-85%	Baseline
High (2k+)	75-80%	75-80%	High (many agents)

#### Recommendation:

- └ Start with 80% in 20 seconds (industry standard)
- └ Adjust based on customer feedback
- └ Increase gradually as team improves
- └ Only decrease if cost absolutely prohibitive
- └ Communicate goals to team

# Real-World Examples

## Example 1: Single Planning Group (Voice Only)

Organization: Small Contact Center

Team: Support Only

Volume: 5,000 calls/day

Planning Group Setup:

- └ Name: Support - Voice Queue
- └ Media Type: Voice Inbound
- └ Queue: Support\_Main
- └ Service Goal: Standard Support
  - | └ SL: 75% in 30 seconds
  - | └ ASA: 25 seconds
  - | └ Abandon: 8%
- └ Staffing Group: Support Agents (40 total)
- └ Scheduling: Load-based with forecast

Impact:

- └ Single forecast for all support calls
- └ All agents cross-trained in support
- └ Flexible scheduling across team
- └ Straightforward staffing calculations
- └  $5,000 \text{ calls} \div 40 \text{ agents} = 125 \text{ calls/agent/day}$

## Example 2: Multi-Planning Group (Segmented)

Organization: Enterprise Contact Center

Team: Support (Tiered) + Sales

Volume: 50,000 calls/day

Planning Group 1: Support Tier 1 (Inbound Voice)

- └ SL: 70% in 60 seconds (lower priority)
- └ Agents: 100
- └ Volume: 20,000 calls/day
- └ Complex calls escalated to Tier 2

Planning Group 2: Support Tier 2 (Inbound Voice)

- └ SL: 85% in 20 seconds (VIP/escalations)
- └ Agents: 40
- └ Volume: 10,000 calls/day (escalated + complex)
- └ Expert agents with higher skill

Planning Group 3: Support - Email

- └ SL: 95% in 4 hours
- └ Agents: 25
- └ Volume: 8,000 emails/day
- └ Async work, different staffing model

#### Planning Group 4: Sales - Outbound

- └ Outbound calls
- └ Agents: 30
- └ Volume: 3,000 calls/day (dialing ratio)
- └ Non-traditional SL (contact rate goals)

#### Planning Group 5: Blended - Email + Chat

- └ Email + Chat handling
- └ Agents: 20
- └ Volume: 9,000 interactions/day
- └ Flexible blended staffing

#### Total:

- └ Planning Groups: 5
- └ Agents: 215 total
- └ Calls/Emails/Chats: 50,000 total daily
- └ Complexity: High (requires separate forecasts for each)

#### Benefits:

- └ Skill segmentation (Tier 1 vs 2)
- └ Appropriate goals per tier (70% vs 85%)
- └ Specialized handling (email vs voice)
- └ Cost optimization (right agents for right work)
- └ Performance clarity (each group tracked separately)

## Example 3: Multi-Channel Blended

Organization: Financial Services

Team: Support (Multi-Channel)

Channels: Voice, Email, Chat

Planning Group: Support - Omnichannel

- └ Media Types: Voice + Email + Chat
- └ Volume Mix:

- | └ Voice: 50% (5,000 calls/day)
- | └ Email: 35% (3,500 emails/day)
- | └ Chat: 15% (1,500 chats/day)
- |
- └ Service Goals:
  - | └ Voice: 80% SL, 20s ASA, 5% abandon
  - | └ Email: 95% in 4 hours response
  - | └ Chat: 85% SL, 25s response
- |
- └ Staffing: 50 agents
  - | └ All trained in voice
  - | └ Most trained in email
  - | └ Some trained in chat
- |
- └ Scheduling:
  - | └ Agents switch between channels during day
  - | └ Chat staffing peak 10-14:00
  - | └ Email staffing even throughout day
  - | └ Voice staffing follows volume curve
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- └ Benefits:
  - | └ Flexibility (agents move where needed)
  - | └ Efficiency (prevent over-staffing one channel)
  - | └ Agent variety (less repetitive)
  - | └ Cost effective (fewer total agents needed)

#### Staffing Calculation:

- └ Voice 5,000 calls: Need ~12-15 agents
- └ Email 3,500/day: Need ~8-10 agents
- └ Chat 1,500: Need ~4-6 agents
- └ If separate: ~25-30 agents total needed
- └ If blended: ~18-20 agents sufficient
- └ Savings: ~25% headcount reduction through blending

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# Service Goal Alignment

## Cascading Goals:

### Business Strategy

- ├ Customer experience excellence
- ├ 95% customer satisfaction target
- └ Competitive advantage

### Operations Goals

- ├ Support SL: 80%
- ├ Sales SL: 75%
- ├ Email Response: 4 hours
- └ Chat Response: 25 seconds

### Team Goals

- ├ Agent individual targets
- ├ Team performance tracking
- ├ Coaching opportunities
- └ Recognition for achievement

### Individual Goals

- ├ Adherence to schedule
- ├ Quality metrics
- ├ Compliance
- └ Development

### Measurement & Feedback

- ├ Daily intraday metrics
- ├ Weekly/monthly reports
- ├ Coaching sessions
- ├ Performance reviews
- └ Adjustments to goals

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# Best Practices

## Goal Setting

- **Realistic** - Achievable with reasonable staffing
- **Challenging** - Push for improvement
- **Industry Aligned** - Competitive with peers
- **Communicated** - Clear to all agents
- **Measured** - Tracked consistently
- **Flexible** - Adjust based on business changes

## Planning Group Design

- **Clarity** - Clear purpose and scope
- **Skill Alignment** - Match agents to requirements
- **Balance** - Not too granular, not too broad
- **Scalability** - Grows with business
- **Maintenance** - Regular updates
- **Documentation** - Maintain mappings

## Interview Cheat Sheet

Question	Answer
What's service goal?	Target metrics for SL, ASA, abandon rate
What's SL?	% of calls answered within target time
What's ASA?	Average wait time before answer
Typical SL?	80% in 20 seconds (industry standard)
What's planning group?	Workload organized by media type and route
Planning group purpose?	Separate forecasting and scheduling
How many planning groups?	1-5 typical (depends on complexity)
Media types?	Voice, email, chat, callback, messaging, workitems
Goal templates?	Reusable at business unit level
Why segment?	Cost optimization, skill alignment, clear metrics
Multi-channel?	Agents handle multiple media types
Benefits blending?	Flexibility, efficiency, cost savings
SL formula?	$(\text{Answered within target}) / \text{Total offered} \times 100$

# Key Takeaways

- **Goals Drive Staffing** - SL goals determine forecast and schedules
  - **Segment Wisely** - Use planning groups for precision
  - **Templates** - Reusable at BU level for consistency
  - **Realistic** - Achievable goals drive motivation
  - **Communicate** - Clear goals to all staff
  - **Track** - Measure and report regularly
  - **Adjust** - Modify as business changes
  - **Multi-Channel** - Blend for efficiency
  - **Industry Standard** - 80% SL in 20 seconds typical
  - **Measurement** - Daily tracking drives improvement
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