

WFM Overview & Setup

Genesys Workforce Management (WFM) Overview & Setup Documentation

Study Notes

Topic	Description
WFM Purpose	Manage forecasting, scheduling, intraday management, adherence, and capacity planning
Core Capabilities	AI-powered forecasting, multi-media scheduling, real-time monitoring, adherence tracking
Organization	Business Units contain Management Units contain Sites contain Teams
Key Features	Multi-channel support (voice, email, chat, callback, messaging, workitems)
Integration	Tightly integrated with Genesys Administrator for skills and real-time data
Architecture	Hierarchical org structure with permissions at BU and MU levels

Navigation

WFM Overview

Genesys Workforce Management provides comprehensive tools to manage contact center workforce through forecasting, scheduling, intraday management, real-time adherence monitoring, and capacity planning. WFM enables organizations to create accurate staffing plans accounting for projected volumes, average handle times, agent skills, and business constraints.

Workforce Management is designed for multi-media, multi-site environments, providing optimal schedules for multi-skilled agents handling different interaction types. Agent preferences, skills, proficiency levels, customer segmentation, historical trends, email response times, and outbound call lengths are all considered within forecast, schedule, and adherence components.

Core Modules

- **Forecasting** - AI-powered volume and AHT predictions
- **Scheduling** - Agent schedule creation and optimization
- **Intraday Management** - Real-time monitoring and adjustments
- **Real-Time Adherence** - Live agent status tracking
- **Capacity Planning** - Hiring and long-range planning
- **Time-Off & Trades** - Agent self-service and request management

Key Capabilities

- Multi-media support (voice, email, chat, callback, messaging, workitems)
- AI-powered forecasting with Automatic Best Method
- Optimized scheduling across multiple management units
- Real-time performance monitoring
- Integration with Genesys Universal Routing
- Agent self-service portal (desktop and mobile)
- Comprehensive reporting and analytics

Edition & Module Requirements

Requirement	Details
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Minimum Edition	Genesys Cloud CX 2-4, Digital, or WEM Add-ons
Licensing	Dedicated WFM licensing per organization
Setup	Requires WFM configuration and integration with Genesys Administrator
Multicloud	Available for Genesys Multicloud CX and Genesys Engage
Mobile	Agent self-service available on iOS and Android

WFM Architecture

Genesys Workforce Management Structure

Business Unit (BU)

- └ Max: 5,000 agents
- └ Forecasts created at BU level
- └ Schedules created at BU level
- └ One master schedule per BU active at a time

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└ Management Unit 1 (MU)

- | └ Max: 1,500 agents
- | └ Represents department, site, or location
- | └ Access control at MU level
- | └ Time-off requests managed at MU level

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└ Management Unit 2 (MU)

- | └ Site A
- | | └ Team 1
- | | | └ Agents (10-50)
- | | └ Team 2
- | | └ Agents (10-50)

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| └ Site B

- | └ Agents

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└ Management Unit 3 (MU)

- └ Virtual agents (remote workers)

WFM Workflow Overview

WFM Management Lifecycle:

PLANNING PHASE:

- ├ Define business units and management units
- ├ Set up service goals and planning groups
- ├ Configure staffing groups and contracts
- └ Establish permissions and access controls

FORECASTING PHASE:

- ├ Gather historical interaction data
- ├ Create forecast scenarios
- ├ Use AI (Automatic Best Method) for accuracy
- ├ Validate and publish Master Forecast
- └ Forecast available for scheduling

SCHEDULING PHASE:

- ├ Receive published Master Forecast
- ├ Create schedule scenarios (up to 6 weeks)
- ├ Balance forecasted demand with constraints
- ├ Optimize for service levels and contracts
- ├ Publish to Master Schedule
- └ Schedule available to agents

OPERATIONS PHASE:

- ├ Real-time intraday monitoring
- ├ Adherence tracking vs schedule
- ├ Real-time adjustments as needed
- ├ Capacity management
- └ Performance metrics tracking

FEEDBACK PHASE:

- ├ Capture actual vs forecast variance
 - ├ Gather interaction data
 - ├ Analyze adherence patterns
 - └ Refine future forecasts and schedules
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Edition Comparison

Feature	CX 2	CX 3	CX 4	WEM Add-on
Basic WFM	✓	✓	✓	✓
Forecasting	✓	✓	✓	✓
Scheduling	✓	✓	✓	✓
Intraday Mgmt	✓	✓	✓	✓
Real-Time Adherence	✓	✓	✓	✓
Advanced Analytics	Limited	✓	✓	✓
Capacity Planning	Limited	✓	✓	✓
Agent Self-Service	✓	✓	✓	✓

Initial Setup Steps

Step 1: Organizational Structure Design

1. Define Business Units
 - Group by operational objectives
 - Each BU forecasts/schedules together
 - Max 5,000 agents per BU
2. Define Management Units (within each BU)
 - Represent departments/sites/locations
 - Max 1,500 agents per MU
 - Enable permission boundaries
3. Define Sites (within each MU)
 - Physical locations or virtual groups
 - Agents assigned to sites

Step 2: Configure WFM Settings

1. Navigate to Admin → Workforce Management
2. Set default time zones
3. Configure week start day
4. Set up planning period (typically 26 weeks)
5. Enable required modules

Step 3: Create Planning Groups

1. Define by media type and queue/route
2. Configure service goals
3. Set staffing requirements
4. Establish activity/skill mappings

Step 4: Configure Agents

1. Assign skills and proficiency levels
2. Assign to teams and sites
3. Set contracts and work rules
4. Configure preferences

Step 5: Set Permissions

1. Assign WFM roles:
 - Administrator (full access)
 - Supervisor (forecasting/scheduling)
 - Analyst (reporting/analytics)
 - Agent (self-service)
2. Grant at Business Unit level:
 - Forecasting permissions
 - Schedule creation/editing
3. Grant at Management Unit level:
 - Time-off approvals
 - Team-specific schedules

Step 6: Integration

1. Connect to Genesys Administrator
 2. Enable real-time statistics via Stat Server
 3. Configure Data Aggregator
 4. Set up Universal Routing integration
 5. Enable agent portal (web and mobile)
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Key Terminology

Term	Definition
Business Unit (BU)	Group of Management Units sharing common operational objectives
Management Unit (MU)	Group of agents within a BU (max 1,500)
Site	Physical location or virtual grouping within an MU
Team	Collection of agents within a site
Activity	Type of work (inbound calls, emails, chats, etc.)
Planning Group	Workload organized by media type and route
Service Goal	Target metrics (SL, ASA, abandon rate)
Master Forecast	Published forecast scenario used for scheduling
Master Schedule	Published schedule scenario used by agents
Work Plan	Definition of shifts, breaks, meals, contracts
Staffing Group	Cluster of agents with similar skills
Adherence	Agent's actual activity vs scheduled activity

Multi-Channel Support

WFM manages workloads across:

- **Voice** - Traditional phone interactions
- **Email** - Asynchronous email support
- **Chat** - Real-time chat conversations
- **Callback** - Scheduled return calls
- **Messaging** - SMS, web messaging, social messaging
- **Workitems** - Tasks routed to agents

Each media type:

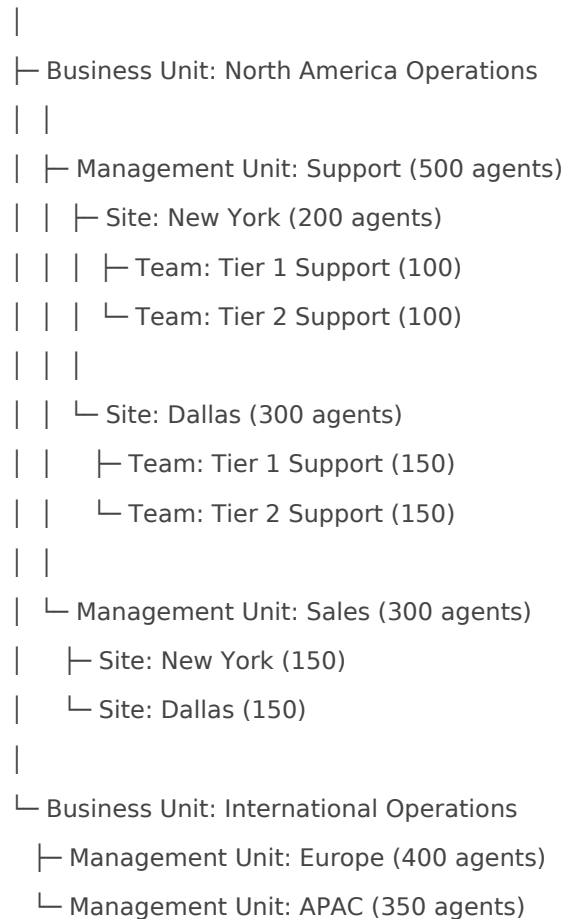
- Has distinct forecasting requirements
 - Supports different interaction patterns
 - Requires appropriate planning groups
 - Contributes to overall agent workload
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Real-World Example

Mid-Market Financial Services Contact Center

Organization Structure:

Financial Services Company



Media Types:

- └ Voice (70% of volume)
- └ Email (15% of volume)
- └ Chat (10% of volume)
- └ Callback (5% of volume)

Planning Groups:

- └ Support - Inbound Voice
- └ Support - Email (3-4 hour response)
- └ Support - Chat
- └ Sales - Outbound Calls
- └ Sales - Sales Chat

Service Goals:

- └ Support: 80% SL, 20 sec ASA, 5% abandon
- └ Sales: 75% SL, 30 sec ASA, 10% abandon

Staffing Model:

- └ Full-time agents (40 hrs/week, 5 days)
- └ Part-time agents (20 hrs/week, 3 days)
- └ Flex agents (variable hours)
- └ Remote agents (work-from-home)

Best Practices

Organization Design

- Align BUs with business operations
- Keep MUs at manageable size (<1,500 agents)
- Use sites for geographic separation
- Use teams for skill-based grouping

Access Control

- Grant minimal necessary permissions
- Use BU-level for forecasting/scheduling control
- Use MU-level for time-off and local scheduling
- Audit permissions quarterly

Data Quality

- Ensure accurate agent configurations
- Keep skills current and proficiency honest
- Validate historical interaction data
- Regular imports of new data

Configuration

- Document organizational structure
- Establish naming conventions
- Create backup configurations
- Test changes in non-prod first

Common Setup Issues

Issue	Cause	Resolution
Can't create forecasts	Missing BU-level permissions	Grant Forecast > Create permission at BU
Agents not in scheduling	Not assigned to sites/teams	Configure agent site/team assignments
Inaccurate forecasts	Poor historical data	Clean data, ensure 90+ days available
Schedule conflicts	Contract violations	Review contract rules, adjust availability
Adherence issues	Unclear activity codes	Simplify, train agents on correct codes
Permission problems	Incorrect scope (MU vs BU)	Verify permission level and scope

Interview Cheat Sheet

Question	Answer
What is WFM?	Software for forecasting, scheduling, intraday monitoring, and adherence
What's a Business Unit?	Group of MUs sharing operational objectives, forecasts/schedules at BU level
What's a Management Unit?	Group of agents within BU (max 1,500), enables permission boundaries
How many agents per BU?	Max 5,000 agents per business unit
How many agents per MU?	Max 1,500 agents per management unit
Where are forecasts created?	At Business Unit level
Where are schedules created?	At Business Unit level
How many schedules per BU?	One master schedule per BU at a time

Question	Answer
What channels does WFM support?	Voice, email, chat, callback, messaging, workitems
What's a planning group?	Workload organized by media type and route
What's the forecasting basis?	Volume (Offered) and Average Handle Time (AHT)
What's Service Goal?	Target metrics (Service Level, ASA, abandon rate)
Where are permissions granted?	At BU level for forecasting, at MU level for time-off
How long is scheduling window?	26 weeks prior and 26 weeks future from current
What's a work plan?	Definition of shifts, breaks, meals, contracts

Key Takeaways

- **Hierarchical Structure** - Business Units contain Management Units which contain Sites and Teams
 - **Agent Limits** - 5,000 per BU, 1,500 per MU
 - **Multi-Channel** - Supports 6 media types (voice, email, chat, callback, messaging, workitems)
 - **AI-Powered** - Uses Automatic Best Method for optimal forecasting
 - **Real-Time** - Live monitoring and adherence tracking
 - **Integrated** - Tight integration with Genesys Administrator and routing
 - **Self-Service** - Agent portal on desktop and mobile devices
 - **Scalable** - Supports large, multi-site contact centers
 - **Flexible** - Multiple scheduling methods and contract types
 - **Data-Driven** - Continuous improvement through metrics and analytics
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Additional Resources

Official Documentation

- WFM Overview: all.docs.genesys.com/PEC-WFM
- Genesys Cloud WFM: help.genesys.cloud/articles/about-workforce-management/
- Business Units: help.genesys.cloud/articles/business-units-overview/
- Scheduling: help.genesys.cloud/articles/work-with-workforce-management-schedules/

Support & Training

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

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