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WORKFORCE PLANNING MASTERCLASS

Channel Planning, End to End

Planning each channel on its own terms — voice, outbound, email, chat, async and social — and combining them honestly

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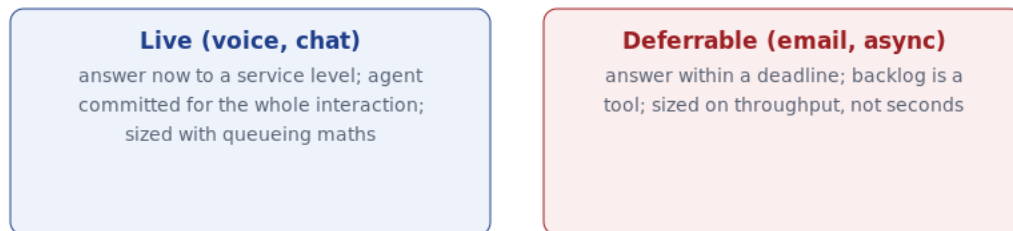
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1. Most planning theory is about phone calls

Almost all classic planning was built for the inbound voice call. The first job of channel planning is to notice that bias and refuse it — because each channel needs its own lens.

Erlang, service level in seconds, the intraday profile: brilliant tools, all shaped by the assumptions of a ringing phone. Five things change channel to channel — who starts the contact, whether it is live or deferrable, how many an agent handles at once, how long it lasts and whether that is even measurable, and what “good service” means. Change those and the maths, the metrics and the staffing all change with them.

A “contact” means a different thing on each channel



Run them all through the call-centre playbook and you mis-plan every one.

Voice maths sizes a queue; it does not size an inbox. Each channel needs its own lens.

Two axes do most of the sorting. **Direction** — inbound versus outbound — and **timing** — real-time versus deferrable. Those alone put voice, outbound, chat, email and social in very different boxes, each with its own planning approach. The unifying discipline is to ask of every channel: who starts it, is it live or deferrable, what is the concurrency, and what does good look like? Those answers, not voice-shaped habit, should drive the plan.

The most common multi-channel mistake is running everything through the call-centre playbook. It fails on every channel at once.

2. Outbound and the dialler

Inbound, you wait for work; outbound, you create it. The work is a list you choose to call, and the constraint is connecting agents to live, useful conversations efficiently. Most dials never reach a person, so you plan on the funnel — dials to connects to **right-party contacts** to outcomes — and right-party connect rate is the number that matters, because it varies hugely by time of day, list age and data quality and must be forecast, not assumed.

Predictive diallers ring more numbers than there are free agents, betting most won’t answer; when too many do, the call is abandoned on the customer. That is not just a commercial trade-off — in the UK, Ofcom caps predictive-dialler abandoned calls at 3% of live

calls over 24 hours, with a mandatory message. It is a legal ceiling, not a target. And the list is finite: connect rates fall as the easy-to-reach people are used up, so plan for a depleting, ageing list, and blend with inbound to mop up troughs.

3. Email and back-office

Email and case work run on two clocks — arrival and completion — and staffing is keeping completion ahead of arrival enough to clear each item within its promised time. That is production-line thinking, not Erlang. Because the work can wait, a backlog is a tool, not a failure: hold it through a peak and clear it in the trough, staffing to the average rather than the peak.

Measure age and deadline conformance — the oldest open item, the percentage cleared within the promise, backlog versus capacity — not service level in seconds. And route the work oldest-first, because left to choose, agents cherry-pick the quick items and the hard ones age into breach. A slow backlog also generates inbound: let email age and customers chase by phone, turning one deferred contact into two live ones.

4. Webchat and async

Chat is live but concurrent — one agent runs two, three or four at once — so you cannot use plain voice Erlang. And concurrency is not a clean multiplier: switching has overhead, two customers type at once, and each chat's wall-clock handle time stretches the more you juggle, so capacity rises with concurrency but **less than proportionally**. Push it too high and response times lengthen, quality drops and agents burn out. Staff on a realistic concurrency factor, or simulate.

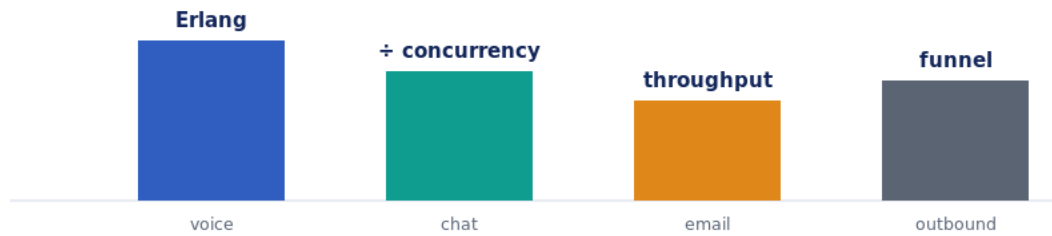
Async messaging — WhatsApp, SMS, in-app — behaves like neither. A conversation can stay open for days while consuming only a few minutes of agent effort in bursts, so you staff the **active handling minutes**, not the open-conversation count, against a per-use-case response-time promise. One agent can hold dozens because most are idle — until several reply at once, which is where service breaks.

5. Social, and the blended operation

Social is public, so the stakes per contact differ: a bad reply or an unanswered complaint is seen by thousands. Volume is spiky and viral-prone, so the plan that matters is the surge-and-escalation playbook for the day your forecast is useless. Target speed-to-acknowledge and sentiment, not handle time, and extend coverage windows — the public does not keep office hours.

Get every channel to one currency: required agent-hours

same demand, five channels



Convert each with the right model, then combine — never add raw contacts together.

Only in a common unit can you see total demand and decide the universal-vs-dedicated split.

Finally, recombine. Plan each channel on its own terms, convert all of them into the same currency — required agent-hours by interval — and only then combine. The size of the blended number depends on one honest question: can the same person actually switch between channels? Universal agents pool capacity and need fewer people; dedicated teams don't — and routing is the control surface that makes whichever you choose actually hold.

Forecast each channel apart, convert to a common unit, and blend only where staff truly flex. Adding raw contacts together is the fast road to a plan that is wrong in both directions at once.

About the author

John Casey has spent more than 30 years in contact-centre workforce planning, including roles as a workforce-planning manager and operations director, and now writes and teaches at ccplanning.net. The views in this paper are his own. It represents general professional experience and is not affiliated with, nor does it represent, any current or former employer.

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