

# [ Case Study No.1 ]



**CALL CENTER  
SCHEDULER**  
TIME FOR BUSINESS



## Southwest Airlines Reservations Saves Millions While Improving Customer Satisfaction, Retention

### [ Background ]

Southwest Airlines (SWA), the fourth largest U.S. domestic carrier in terms of customers boarded. The airline has nine reservations call centers totaling 4,700 reservations agents in seven states who answer 65 million calls annually. Southwest Airlines Reservations maintains a 24-hour operation, but no individual centers are open 24 hours. The centers vary in terms of operational hours, but all are open seven days a week. As part of its customer service commitment, Southwest answers all reservations calls with live agents. The agents are represented by the International Association of Machinist and Aerospace (IAM) workers union.

### [ Business Problem ]

SWA's reservations centers operated independently and, as a result, employee over-time costs, consistent coverage and service level objectives were a constant battle to manage. In addition, the customer experience in terms of hold time varied depending on the call center handling the call.

"We wanted to reduce the abandon rate by establishing a more consistent customer experience. That meant unifying our approach to call handling and scheduling," said Rob Lalim, Director of Automation.

The airline determined it needed to schedule all reservations centers as one virtual center and assigned a team to review the major workforce management solutions on the market. They found that none met SWA's business objectives due to union rules and a complex shift bidding process. To solve the workforce management problem, SWA relied on the expertise of Call Center Scheduler founders Wayne Shaw and Bill Wax.

### [ Solution ]

"The strategy was to match division-wide scheduling with a new call allocation process, enabling Southwest to maximize resources and reduce communications costs," said Shaw.

"Inefficient use of resources is costly," said Lalim. "At Southwest, it is seven times more expensive to have an agent available than a call holding. However, if we abandon too many calls, the cost of lost revenue or customer satisfaction far outweighs salary costs. We had to balance the two."

Over a six-month period, Call Center Scheduler's team gathered feedback from all of the centers' management and created a software solution and processes that met union rules and SWA's business needs. To roll out the new system, the Call Center Scheduler team met with all call center employees and discussed how the staffing processes would change their work environment.

"We addressed what it would mean to each employee personally, so they could fully realize the benefits of consistent work pace and centralized scheduling," said Shaw.

Initially SWA introduced the workforce management system in a single call center; then added a call center a month, with three the last month. All centers were operating under the new workforce management system within six months.

Call Center Scheduler also created a shift assignment process that allowed agents to submit "bids" based on their personal work preferences and seniority.

"This automated approach accelerated the assignment process significantly. What once was a month long process, a central group now accomplishes for each center in a matter of hours," says Ellen Torbert, Vice President of Reservations.

SWA also introduced the new processes and software to the union early in the adoption schedule, so they could completely understand how it worked and could answer memberships' questions about new scheduling practices.

## [ Benefits ]

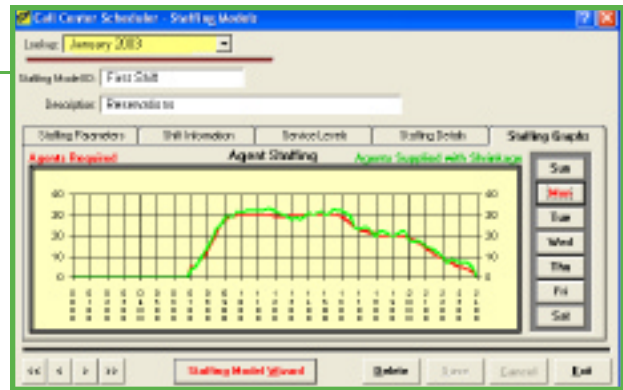
Call Center Scheduler developed a workforce management system that enables SWA to identify its customers' calling habits and effectively schedule all call centers from a central scheduling facility.

At SWA Reservations, agent salaries account for over 60% of the budget. So effective scheduling has significant impact.

"The Call Center Scheduler solution addresses business objectives and our collective bargaining agreement issues. As a result, we have saved millions while improving customer service and employee morale," says Torbert.

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**Rob Lalim, Director of Automation  
Southwest Airlines**



Call Center Scheduler shows exactly how many agents are required to meet service levels throughout the day.

- ▶ **[Reduced overtime expenses]** – By improving forecasting and scheduling practices with Call Center Scheduler, SWA adjusted its staffing mix to be more efficient – improving service levels while reducing salary costs.
- ▶ **[Shorter hold times]** – Customer average wait changed from 45 seconds to 3 seconds. This greatly reduced communications costs.
- ▶ **[Greater revenue opportunities]** – SWA was able to answer more calls and book more reservations with the same number of employees.
- ▶ **[Higher customer loyalty]** – The customer experience became consistent center to center, resulting in better service and more repeat business.
- ▶ **[Better internal budgeting capabilities]** – Because SWA reservations could predict its staffing needs a year in advance, they overcame inconsistencies and became a model of budget compliance.
- ▶ **[Effective use of time]** – Managers and admin work groups now have more time to focus attention on other areas.
- ▶ **[Millions saved]** – Call Center Scheduler reduced communication costs significantly by reducing hold times and scheduling the right staffing mix.
- ▶ **[Improved hiring practices]** – SWA could now create a hiring and training plan based on forecasted staffing needs. This meant new hires would be ready to receive calls at the same time volume was on the rise.
- ▶ **[Happier employees]** – A consistent work pace was created and employees could better predict their schedule and work scenario.



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## [ Contact us today ]

Call Center Scheduler delivers the most affordable, practical solution to workforce management in your call center. You'll strengthen employee morale and improve customer relationships while you see a significant return on investment. Call today for more information, **1-866-222-2363**. We look forward to helping solve your workforce scheduling challenges.

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