



Intraday Management at Northwestern Mutual

Jeremy Lewandowski shared Northwestern Mutual's command center's intraday management routine and the business outcomes that they drive.

Daily Activities:

Northwestern Mutual's command center's daily activities include:

- **Morning huddles.** Managers of the operation and the command center meet each morning to prepare for the upcoming day, discuss yesterday's results and look at what the outlook for the day is.
- **Proactive alerts to leadership.** By using a real-time adherence tool, the command center watches at a bird's-eye view so that leaders can focus on other tasks. The command center is able to see what agents across all centers are doing and inform the agent's leadership team if an agent reaches a predetermined threshold for instances such as time away from their desk, long phone calls or hold times. Once alerted, the leadership team decides what action they would like to take or not.
- **Proactive schedule smoothing.** When schedule changes arise, such as people calling in sick, website crashes or call-log back-up, the command center is already in the scheduling software and can make the necessary changes to still meet daily goals.
- **Schedule optimization.** When there are requests to add meetings to the schedule or there is existing backlog, the command center can be proactive and plan out days in advance by smoothing schedules along the way instead of being reactive the day of.
- **Monitor queue performance.** The command center also watches how each work group in all queues are performing across all centers. This includes monitoring staffing within queues to make sure there are no gaps that require pulling resources. If high call volume or system issues arise, the command center can activate per-queue messaging to notify callers of potential delays.
- **Monitor variance to forecast.** The command center monitors the forecast and lets leadership know when a forecast needs to be adjusted and change their plan for the upcoming day. They also work to make adjustments to the rest of the week based on the changes in the forecast.
- **Pulling levers to hit service level and cycle time goals.** The command center is constantly moving agents in and out, work overtime or sending them home early in order to meet service level and cycle time goals on a regular basis.
- **Ad hoc questions and reporting.** The command center is the central hub for call center operations information. Therefore, the command center answers questions and provides reports daily to assist agents and leadership when issues arise.



Practice
Director
Perspective

"Northwestern Mutual is unique in their process of looking at the percentage of intervals hitting service level goals. This is not a common practice and an innovative idea that I believe other member companies would find useful to implement as well."

For more information:



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Business Outcomes:

Business outcomes that the command center is driving on behalf of the businesses they support as a shared service include:

- **Consistently hit service level.** The command center monitors not only if they are hitting the service level goals but also what the service level consistency is, a metric that Northwestern Mutual has developed over the last few years. This metric does not look at one number at the end of the day but how consistent customer service representatives are throughout the day at hitting the service level. The command center looks at how many intervals throughout the day they are hitting the service level goal. This ensures the experience is consistent throughout the day for both employees and clients.
- **Customer service representative occupancy.** The command center monitors how busy the customer service representatives are when logged onto the phone with the goal of hitting the sweet-spot of 80-90 percent occupancy. The command center works to find the balance of hitting the service level while maintaining a proper occupancy that keeps representatives busy without burning them out .
- **Back office cycle time goals met.** Northwestern Mutual representatives also have back office work as a break from calls. This also gives the company burst capacity when it's needed. If there is a spike in calls in the queue, they can pull staff in that were processing transactions. The command center works to make sure there is a balance between processing cases and taking new calls in order to prevent status calls.
- **Process improvement.** The command center is uniquely positioned to see opportunities to improve business and provide recommendations to leadership for better planning, execution and overall operations of the company. Based on these suggestions, leadership can make the necessary changes in order to continue to hit service goals.