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NC Retirement Systems Counseling Center

Consultancy Service Overview

January 29, 2025

Project Purpose And Methodology

October – December 2025

Mission Statement:

To provide exceptional service efficiently; respecting other's time, so we may serve more

Assessment Focus Areas

The assessment examines organizational structure, staffing, scheduling, leadership visibility, culture, communication, workflow, and technology tools.

Goal of the Assessment

Aim is to identify systemic challenges to improve member experience, stabilize staffing, and enhance performance.

Focus on Systemic Solutions

Provide actionable insights to support strategic decisions and enhance service delivery for sustainable future operations.

Data was collected with these primary methods:

- **Documentation Review:** call reviews, monthly scorecards, evaluations, coaching forms, performance, attendance policy, HR policies.
- **Staff Interviews:** Executive Director, Director of Member services, Business Systems & Staff Development Manager, four Supervisors, four Team Leads, two Trainers, and four Counselors of different tenures.
- **Observations:** call shadowing, onsite interviews, tour of center, working at vacant desk, Mystery Caller evaluations, review of telephony dashboards, counselor use of resources, escalation workflow, Member Services Requests (MSREQs).
- **Multiple datasets extracted** from the NICE inContact platform and internal operational records covering May through October 2025.
- Includes **benchmarking industry standards**, analyzing performance metrics, and prioritizing issues by impact and urgency.



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Data Analysis Key Findings

Root Cause Phase: Pattern Stability

Call Demand Was Not the Villain, AHT Remained Consistent

Time series analysis results confirm internal instability drivers. There is no link to demand variability or handling time fluctuations.

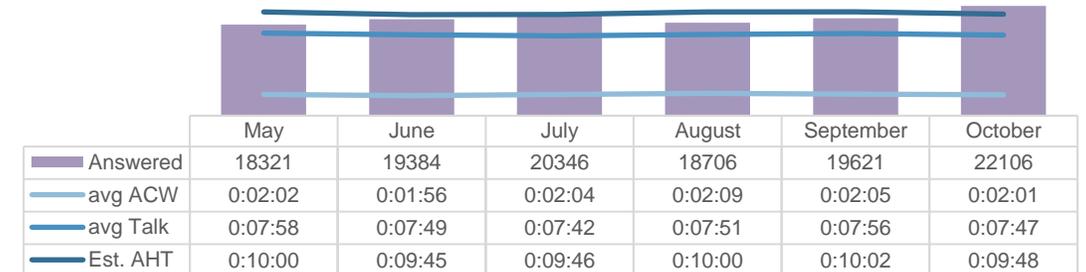
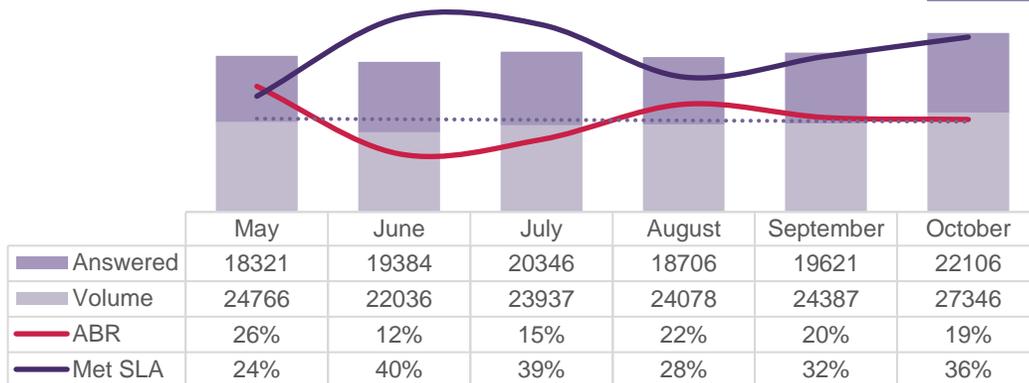
Call Volume Fluctuation

- Overall volume stable, no notable monthly or weekly spikes
- No seasonal or payroll/retirement cycle surges
- Intraday distribution varies day-to-day, but not in monthly averages
- No consistent or recurring peak-hour pattern

Agent Handle Time (AHT)

- AHT remains steady at around 10 minutes
- ACW and Hold time components are also stable
- AHT and handling components on target with no performance drift

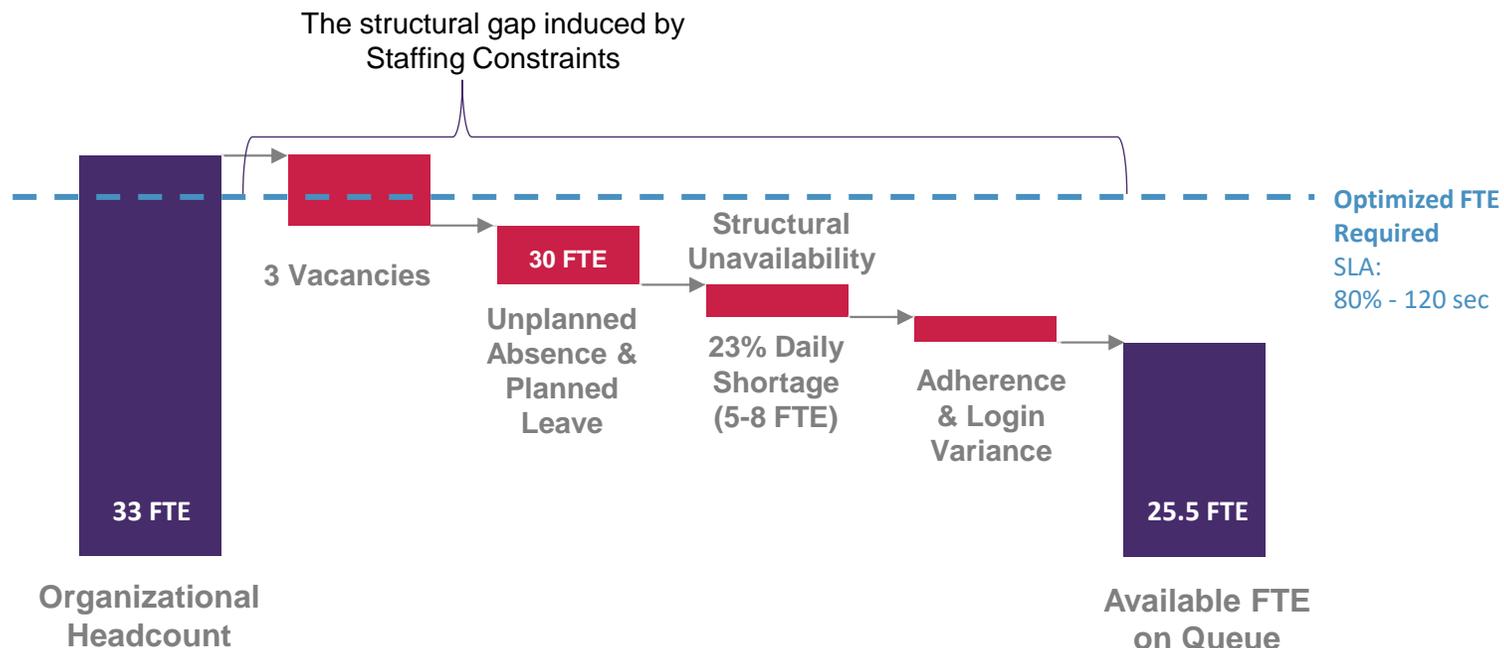
Average Number of calls per month: 24,425 (~1110 calls/day)
Average ABR% per month: 19%
53% caller hang up within 2 minutes; 41% in 5 minutes



Chronic Capacity Deficit

Root Cause: Workforce Availability creating a bottleneck

Nominal vs Effective Staffing Capacity: Phantom Workforce Deadlock



- Required staffing is met in theory but not in practice.
- Effective FTE is materially lower than nominal due to structural unavailability.
- Traditional shrinkage models underestimate actual capacity loss.
- Absences, partial days, and adherence gaps create non-convertible FTE.
- SLA attainment depends on aligning schedules and availability with real demand.

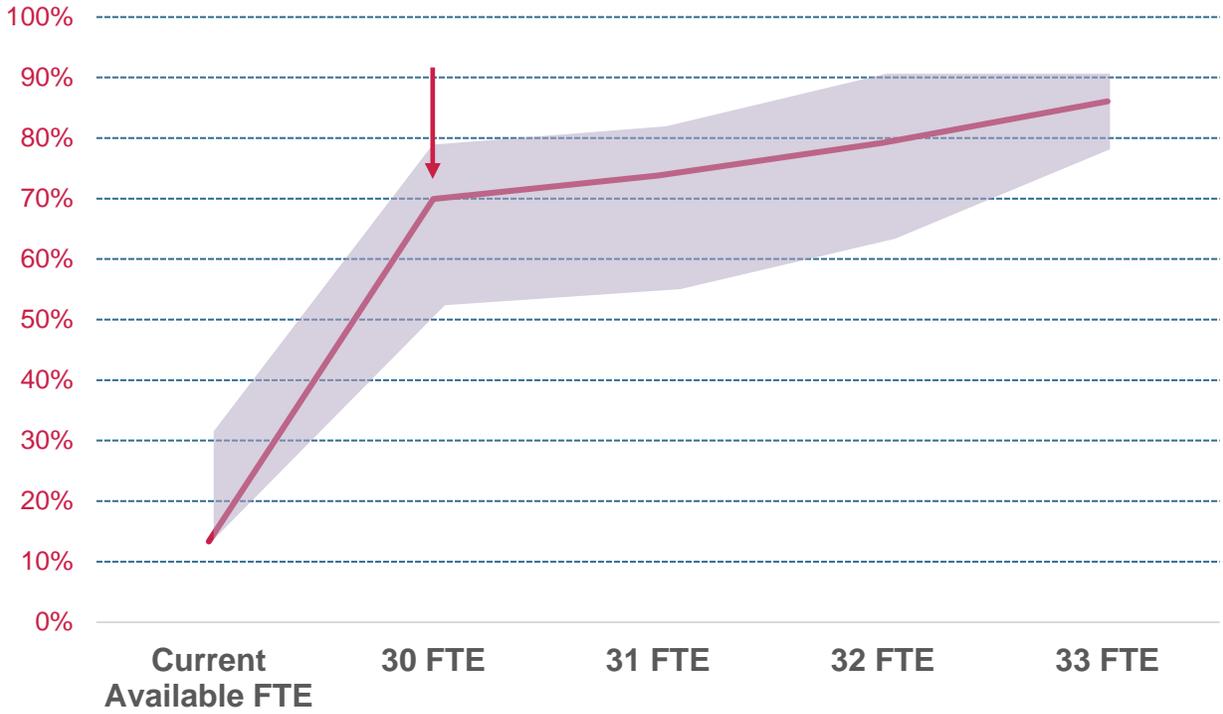


Reverse Engineering

When the chart shows 33 FTE, it means that we guarantee the availability of 33 FTE in every hour. The minimum and maximum values in the purple area represent the range of possible SLA achievement when call volume fluctuates and when some of the 33 FTE are unavailable during that time

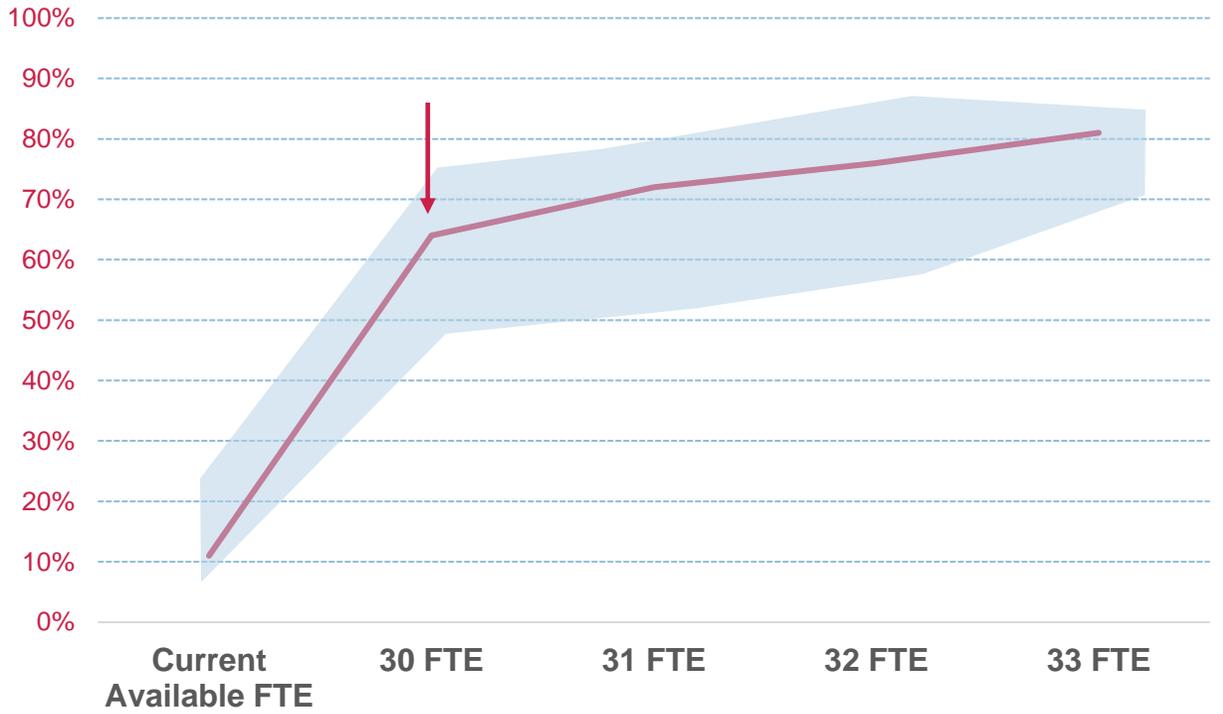
Estimated achievement of the 80% **within 4 minutes** SLA based on actual available FTE and projected FTE scenarios.

Projected SLA Compliance at Varying FTE Levels



Estimated achievement of the 80% **within 2 minutes** SLA based on actual available FTE and projected FTE scenarios.

Projected SLA Compliance at Varying FTE Levels



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Operational Assessment

Operational Assessment: TL Phone Coverage

Perception that TLs are on phones 60-70% of their day

TLs were unclear on current requirements for going on calls

Other duties cannot be done because constant interruption by their counselor's questions

Table 1

	May	June	July	August	September	October
TL 1	1.00%	0.40%	0.40%	0.30%	0.20%	0.10%
TL 2	1.10%	0.30%	0.30%	0.30%	0.10%	0.00%
TL 3	1.10%	0.20%	0.40%	0.40%	0.10%	0.10%
TL 4	0.70%	0.20%	0.20%	0.30%	0.10%	0.10%

Table 2

	May	June	July	August	September	October
New ABR	21.80%	8.00%	11.20%	18.50%	15.90%	15.90%
Actual ABR:	26.00%	12.00%	15.00%	22.30%	19.50%	19.20%

Table 1: Total % of calls TL handled per month

Our data show that TL's handled approximately 10 calls per day in May, but in subsequent months, their activity averaged closer to 5 calls per day.

Table 2: Reduction in Abandonment*

Scheduling team leads on the phone would result in 30 to 40 more calls handled a day. This would improve ABR and improve customer satisfaction. The overall SLA would improve. Other benefits would be faster resolutions, fewer escalations, and improve FCR by 10-15%. The plan schedules each TL for ~2 hours/day of uninterrupted phone time (≈ 10 calls at ~10 minutes AHT). This is enough to stabilize peaks without consuming their whole day and any additional tasks

*Based on historical data and if each TL was able to complete 10 calls a day to total 40 calls



Team Lead Phone Coverage Recommendations

	08:00:00	09:00:00	10:00:00	11:00:00	12:00:00	13:00:00	14:00:00	15:00:00	16:00:00
Monday	0.7%	3.3%	5.1%	1.9%	1.2%	3.5%	5.4%	5.6%	1.4%
Tuesday	0.7%	2.1%	4.3%	1.8%	0.9%	2.7%	3.6%	4.4%	1.7%
Wednesday	0.8%	2.4%	3.9%	1.5%	0.9%	2.2%	3.3%	4.0%	1.3%
Thursday	0.6%	1.5%	2.5%	1.0%	0.6%	1.9%	2.6%	3.1%	1.0%
Friday	0.5%	1.6%	2.8%	1.0%	0.7%	1.7%	2.6%	2.9%	0.7%

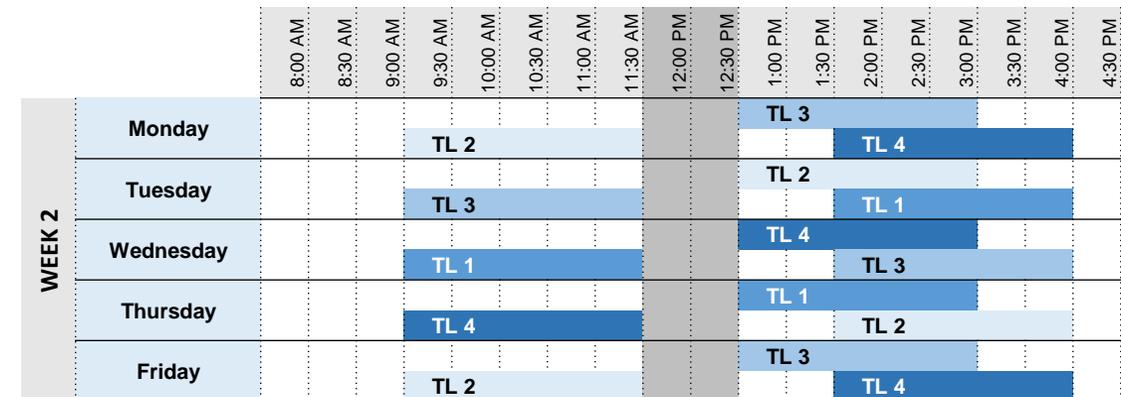
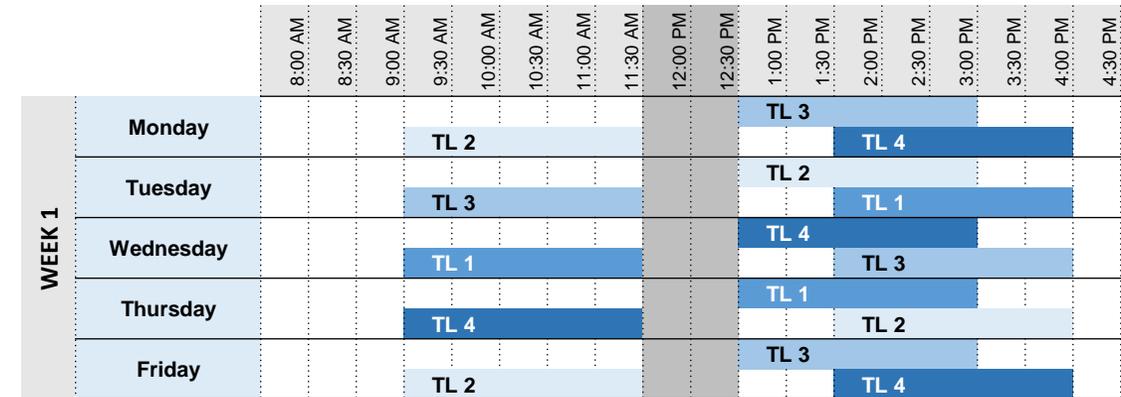
Need Phone Coverage

TLs need time to complete other job requirements

Solution:

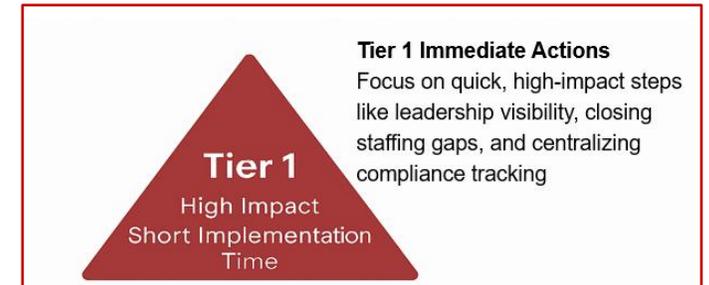
- Schedule 3 TLS to cover phones 2 hours at peak times
 - *Approx: 30 additional calls per day handled*
- Once their phone time is over, they are on “admin” time rest of the day to complete other tasks
 - They complete all the reporting that is needed
 - Do call reviews, meet with counselors
 - Handle escalations and call backs
 - Reassigns MSREQs
 - QA and coaching
 - Training and refreshers

Team Leads Phone Coverage



Critical Issues Requiring Immediate Attention

- **Address Staffing Gaps:**
 - Implement Team Lead coverage rotations, utilize centralized FMLA tracking for proactive planning, hire workforce manager for schedule management.
- **Increase Leadership Visibility & Cultural Cohesion:**
 - Accountability and tracking of assigned duties
 - Structured floor presence, unified communication channels, and engagement programs to break silos and boost morale.
 - Weekly shadowing sessions by supervisors to improve engagement, confidence, and retention and assist in QA duties
- **Clarify Team Lead Roles:**
 - Define expectations for phone support and QA responsibilities to reduce ambiguity and improve efficiency.
 - Enforce uninterrupted blocks for QA and reporting; explore automation and shared responsibilities.
- **Dashboards:**
 - Implement skills and agent status dashboards for everyone. Use automated reporting to reduce manual workload and free supervisors for coaching.
- **Retention:**
 - High risk of burnout and loss of team members
 - Introduce gamification and short-term recognition programs.
 - Develop career paths (SMEs, peer coaches, assistant team leads, Senior Team Lead, etc.)
 - Consolidate communication channels and add a “virtual breakroom.”
- **Recruitment:**
 - Lengthy screening and onboarding
 - Expediate screening using skill-based assessments, quick phone screens, update job descriptions
 - Keep a continuous job posting and automate screening steps to maintain a pre-screened candidate pool
 - Leverage contract roles during peak periods.



Recommendations

Address Critical Staffing Shortage

- FMLA leaves 12 of current 29 employees needs to be tracked for scheduling
- Possible ways to provide immediate resources:
 - 3 Permanent vacancies;
 - 2-5 Contract Employees
 - Consider Part-Time Employees
 - Add TLs to phone to cover peak times

Need Weekly Workforce Management Support

- 10hr/week
- Manage Work Schedule, Breaks, Planned Vacancies, FMLA tracking, unplanned absences, forecasting, and capacity planning

Move to Interactive Knowledge base tool

- AI powered search tool



Expected Outcomes

Foster a healthier environment supporting sustainable performance and reduce burnout

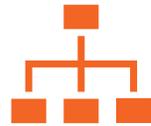


Staffing Stabilization Benefits

MOD and scheduled phone coverage ensures availability during high volume times and boosts morale

Adding contractors to fill gaps

Distribution of workload



Leadership and Culture

Enhanced leadership visibility fosters a cohesive, engaged, and positive organizational culture.

Enhanced performance management and accountability for deliverables

Visible leadership and clear roles

Recognition programs boost engagement



Improved Service Levels and Member experiences

Align SLA, reduce ASA, ABR, and streamline MSREQs

Enhanced QA, coaching



Long term Operational Efficiency

Centralized FMLA tracking will streamline operations and reduce compliance risks.

Reduces Occupancy rates improving retention, schedule adherence

Workforce management allows data analysis to quantify improvements

