

How a Fortune 500 financial services company transformed workforce planning with Aspect



At a glance

The Challenge

A Fortune 500 global financial services and insurance company needed to modernize workforce management for more than 2,600 employees across phone-facing and back-office teams. Manual schedule exceptions, an ineffective shift-bidding process, and fragmented Outlook and SharePoint calendars created administrative work, limited visibility, and frustrated employees.

Customer

Fortune 500 global
financial services and
insurance company

Number of agents

2,600+

Aspect Solutions

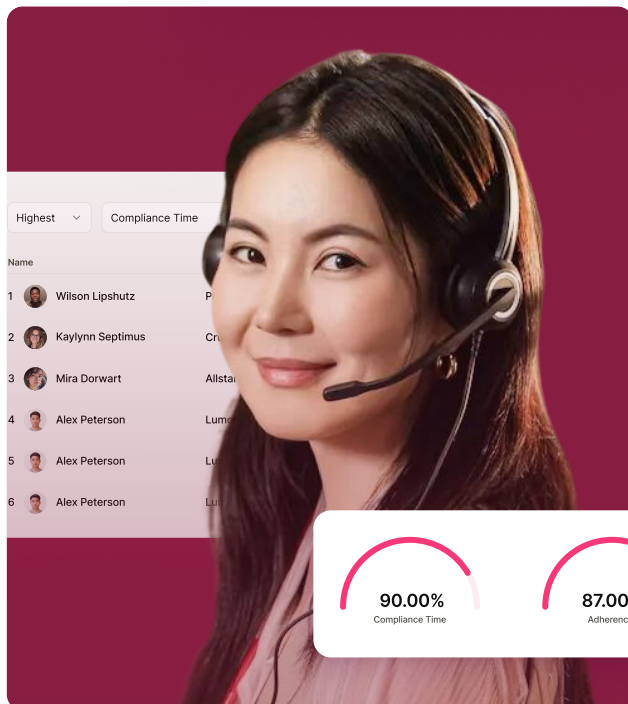
Aspect Cloud Workforce

Industry

Financial services and
insurance

The Solution

The company expanded its use of Aspect Workforce and moved to Aspect Cloud Workforce. The team automated schedule-exception processing, introduced preference-based scheduling, and centralized back-office scheduling and time-off management using established business rules and intraday performance data.



The Impact



Fewer schedule exceptions

Monthly exceptions fell from more than 10,000 for 1,200 employees to 4,000 for 2,600 employees.



Higher schedule satisfaction

The percentage of employees working their ideal schedule increased from 46.5% to 83.37%.



Lower administrative workload

Real-time data and automated workflows significantly reduced manual exception processing.



Fairer back-office scheduling

Centralized time-off management replaced disconnected calendars with a consistent, rules-based process.

The organization

A Fortune 500 global financial services and insurance company helps individuals and businesses around the world access the financial tools, resources, and information they need to achieve their goals.

Its workforce management system—known internally as Engagement Center WFM—supports more than 2,600 employees across five locations, 18 phone-facing business units, and 12 back-office groups. The WFM team also includes two data analysts and two technology analysts.

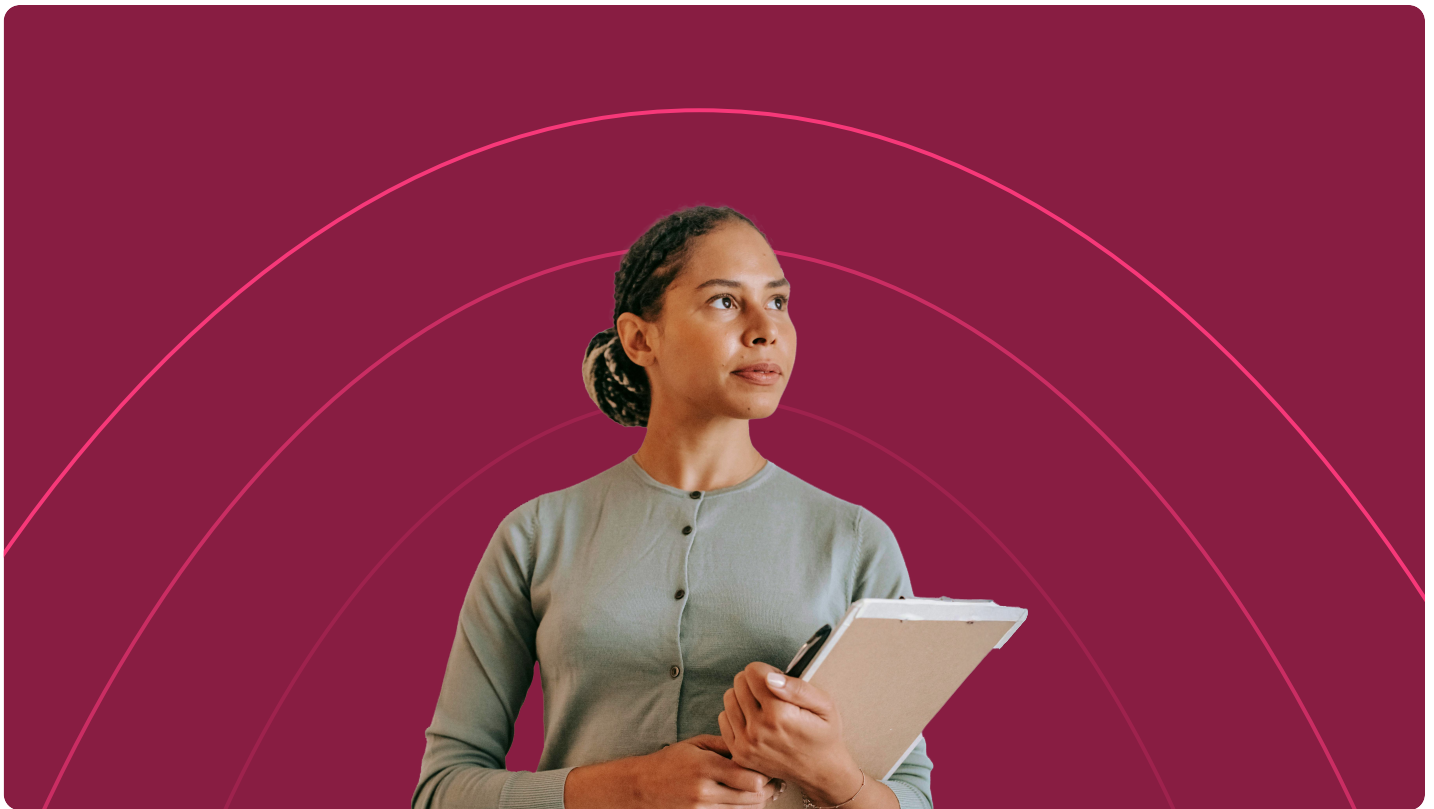
The company has been an Aspect customer since 2005. Over that time, its WFM team has continued to find new ways to use technology to improve operational efficiency, employee satisfaction, and customer service.

Motivation for change

As the organization grew, three workforce management challenges became increasingly difficult to sustain:

- ✓ **Manual schedule-exception processing**
Deviations of just five minutes required manual updates—at peak, over 10,000 exceptions/month for ~1,200 employees, using a custom tool built outside Aspect.
- ✓ **Low confidence in shift bidding**
Bidding on a new schedule returned an employee's current schedule to the pool, so unhappy employees often avoided bidding at all—leaving many stuck in schedules they didn't want.
- ✓ **Fragmented back-office scheduling**
~400 back-office employees managed time off via Outlook/SharePoint calendars tied to work type. Moving roles could orphan approved time off on old or deleted calendars, and approvals were inconsistent depending on leader availability.





Why Aspect

The company continued to invest in Aspect because the platform supported its goal of becoming more proactive and less reactive.

Rather than simply forecasting demand and creating schedules, the WFM team wanted to automate repetitive work, respond to intraday conditions, give employees more control, and help operational leaders make better-informed decisions.

With Aspect Cloud Workforce, real-time data became available directly within the database. This allowed the company to move beyond its custom reporting process and automate more of its schedule-exception workflow.

The team's goals were to:

- ✓ Automate schedule-exception processing
- ✓ Reduce reliance on external reports, databases, and queries
- ✓ Give employees schedules that better reflected their preferences
- ✓ Centralize back-office scheduling and time-off management
- ✓ Create a fairer approval process based on consistent business rules
- ✓ Use real-time information to make more proactive workforce decisions

The Results



Reduced monthly schedule exceptions by 60%

With Aspect Cloud Workforce, real-time adherence data became available directly within the database, eliminating the need to manually run and export RTA reports. The automated workflow can collect real-time data, push it into the database, load exception information into the Aspect segment worksheet, and save the updates with one click.



Monthly exceptions fell from more than **10,000** to **4,000**



The reduction was achieved while the supported workforce grew from **1,200** to **2,600 employees**



The team reduced manual processing despite supporting more than twice as many people



Increased ideal-schedule attainment to 83.37%

Traditional shift bidding discouraged employees from pursuing better schedules because participating meant giving up their existing schedules without certainty that the replacement would be more desirable. The company addressed this by introducing preference-based scheduling within Aspect Workforce.



Under traditional shift bidding, **46.5%** of employees said they worked their ideal schedule



After adopting preference-based scheduling, that figure rose to **83.37%**



Employees gained a clearer path to schedules that better matched their needs and preferences



Created a fairer back-office scheduling process

Using the Aspect Workforce back-office performance capabilities, leaders no longer have to manage schedules and time-off requests through disconnected Outlook and SharePoint calendars.

The centralized system provides greater visibility and applies established business rules more consistently. Leaders can also use intraday performance information to evaluate requests based on expected workloads.



Replaced fragmented Outlook and SharePoint calendars



Improved visibility into previously approved time off



Enabled workload-informed approval decisions



Established a more consistent and equitable process



Reduced frustration for employees and operational leaders

What stood out

- ✓ **Substantial automation at scale**
The team reduced schedule exceptions while more than doubling the number of employees supported.
- ✓ **Measurable improvement in employee satisfaction**
Preference-based scheduling increased ideal-schedule attainment by nearly 37 percentage points.
- ✓ **More proactive workforce management**
Real-time data allowed the WFM team to spend less time reacting to exceptions.
- ✓ **Fairer, more consistent decisions**
Established business rules replaced fragmented and potentially inconsistent approval processes.
- ✓ **Better support for back-office operations**
Intraday performance data helped leaders align time-off decisions with actual workload patterns.



Looking ahead

With a more automated and centralized workforce management foundation, the company can continue exploring ways to make work easier for employees, operational leaders, and WFM teams.

Its proactive approach extends beyond forecasting and scheduling. The organization continues to look for new ways to use Aspect technology to improve efficiency, strengthen employee satisfaction, and provide better experiences for customers around the world.

“

The biggest shift was moving from manual, reactive processes to a more proactive approach. With Aspect, we can support more employees, give them greater control over their schedules, and help leaders make more informed decisions.”

— Assistant Director, Engagement Center WFM

About Aspect

Total amount saved
annual by some
enterprise-level clients

\$9.5M

Fewer schedule
change requests

40%

Hours saved
annually in manual
admin work

4,500

About Aspect

At Aspect, people come first. That's why we created powerful, intuitive workforce management solutions with humans at the forefront. Built upon more than 50 years of industry-leading experience, we're shifting sights to redefine workforce management.

Our Technology

With Aspect, you will transform your contact center with our enterprise workforce management. Plan smarter and act faster with enterprise workforce management powered by real-time intelligence — unifying AI forecasting, dynamic scheduling, and performance analytics.

About Aspect Intelligence™

At Aspect, we believe AI should empower people, not replace them. Our vision for AI reflects a simple but powerful idea: technology should strengthen workforce capabilities, reduce friction, and deliver measurable improvements to every aspect of workforce engagement management (WEM) — all while maintaining the human connection that is at the heart of exceptional experiences.