



FORRESTER®

The Total Economic Impact™ Of Intradiem

Cost Savings And Business Benefits
Enabled By Intradiem

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Table Of Contents

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Executive Summary	1
The Intradiem Customer Journey	6
Key Challenges	6
Solution Requirements/Investment Objectives	7
Composite Organization	7
Analysis Of Benefits	8
Improved Efficiency Of Employee Training (Including Overhead)	8
Increased Customer-Service-Agent Productivity .	10
Improved Administration Efficiency	12
Reduced Employee Attrition	13
Increased Voluntary Time Off	15
Unquantified Benefits	17
Flexibility	18
Analysis Of Costs	19
Planning, Implementation, Licensing, And Success-Management Fee Costs	19
Financial Summary	21
Appendix A: Total Economic Impact	22
Appendix C: Endnotes	23



ABOUT FORRESTER CONSULTING

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Executive Summary

Great customer-service delivery depends on an optimal blend of human skills and technology. Intradium helps contact-center operators increase return on investment with intelligent automation solutions that boost agent productivity, reduce time spent on low-value tasks, and streamline delivery of training and other employee development processes. Intradium delivers measurable gains in efficiency and productivity, which reduces operational costs from attrition and increases customer satisfaction and loyalty.

Intradium offers intelligent automation solutions that increase customer service agent productivity, reduce the time supervisors and workforce management (WFM) teams spend on low-value tasks, and help streamline training delivery.

Intradium commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) enterprises may realize by deploying its solutions.¹ The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of Intradium on their organizations.

To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed four decision-makers with experience using Intradium. For the purposes of this study, Forrester aggregated the interviewees' experiences and combined the results into a single composite organization.

These interviewees said that prior to using Intradium, their organizations' employees struggled to process and react to the right information in a timely manner to support frontline staff and manage the constantly changing conditions in their contact centers. Supervisors lacked the real-time insights to effectively monitor productivity or help on difficult calls. Employees spent too much time on manual tasks, which limited their availability to conduct analysis, support incoming interactions, provide coaching, and deliver training. The interviewees'

KEY STATISTICS



Return on investment (ROI)

342%



Net present value (NPV)

\$19.98M

organizations were challenged to maximize contact center employee productivity while keeping staff engaged and avoiding burnout that drove costly attrition.

Because of their investments in Intradium, the interviewees' organizations:

- Improved the efficiency of scheduling and providing training by automatically delivering training and coaching during low-contact volume intervals.
- Increased the yield of productive work generated by customer service agents.
- Reduced the time employees spent on low-value and less rewarding manual tasks, such as staff scheduling and coding schedule changes and absences.
- Improved the quality of contact-center work environments, which contributed to lower employee attrition rates.

- Provided better alignment of schedules to real-time interaction volumes.
- Improved agent retention.
- Improved the quality of their customer experience (CX).

KEY FINDINGS

Quantified benefits. Risk-adjusted present value (PV) quantified benefits include:

- **Improved efficiency of employee training (including overhead), valued at \$9.4 million.**
The interviewees' organizations utilized Intradiem to automatically deliver training to individual agents during pockets of availability. They saved on overhead time that was previously wasted when multiple agents would be pulled away from phones and need to wait for other attendees to start the sessions. Automating the delivery of instructional sessions also greatly reduced the need to use overtime to delivering agent trainings. The capabilities of Intradiem reduced the amount of time required to schedule or reschedule trainings, and they helped improve the efficiency of trainers by enabling them to deliver more instruction online.
- **Increased customer service agent productivity, valued at \$7.7 million.**
Interviewees' organizations utilized Intradiem to find areas of efficiencies and to improve the productivity of their agents' on- and off-phone tasks. Decision-makers could adjust the rules engine to optimize use cases for the unique environments of their organizations' contact centers.
- **Improved administration efficiency, valued at \$1.0 million.** Intradiem automated much of the time-consuming manual work associated with connecting supervisors with their teams, rescheduling training and coaching, and coding schedule exceptions. Interviewees said their

organizations reduced the supervisor effort spent on scheduling-related tasks by 25%.

- **Reduced employee attrition, valued at \$2.4 million.** The automation capabilities of Intradiem minimized the time contact-center agents, supervisors, WFM analysts, and trainers needed to spend on manual, low-level tasks, and helped them feel more supported and valued by their companies. These benefits helped improve job satisfaction and contributed to significantly lower employee attrition across the organizations' contact centers.
- **Increased voluntary time off (VTO), valued at \$5.3 million.** The interviewees' organizations saved labor costs by utilizing Intradiem to identify when agent capacities exceeded interaction volumes so they could offer blocks of voluntary time off to frontline employees.

Unquantified benefits. Benefits that are not quantified for this study include:

- **Improved employee satisfaction.** Intradiem supported agents and helped them stay connected to their teams. Automation in the platform made work easier for supervisors, WFM analysts, trainers, and managers. As a result, employees became more engaged and satisfied.
- **Improved content retention through shorter training sessions.** Interviewees said their organizations transitioned portions of longer classroom-setting trainings to short, targeted sessions delivered directly to agents. In addition to improving efficiency, this change led to better retention of the instructional materials.
- **Gained the trust of internal stakeholders.** Interviewees said the ROI for the platform and additional use cases added in subsequent years continued to exceed initial expectations. They appreciated being able to leverage this track record when seeking funding for future initiatives.

- **Having valuable customer success resources.**

Interviewees said Intradiem success managers meet with them on a regular basis and provide valuable support in training, optimizing existing use cases, and planning for upcoming innovations.

- **Embracing a culture of ongoing innovation.**

Intradiem introduces new functionalities each year, and this helps organizations continuously improve their operations and increase profits.

Costs. Risk-adjusted PV costs include:

- **Planning, implementation, licensing, and success management fee costs of \$5.8 million over three years.**

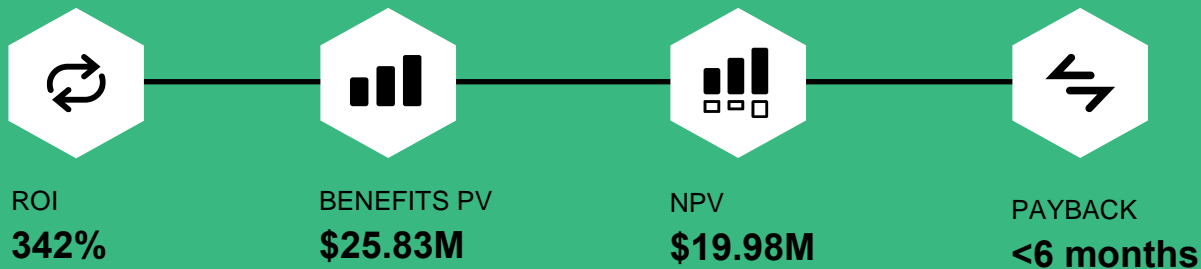
Intradiem determines licensing costs on a per-seat per-month basis according to the number of users and use cases deployed.

Success management fees include training, support, sharing best practices across client bases, and guidance for Intradiem's release roadmap. Intradiem is a software-as-a-service (SaaS)-based solution that interacts with organizations' existing WFM and automatic call distribution (ACD) systems. Interviewees said they didn't need to displace any products and that implementation was focused on integration with those platforms.

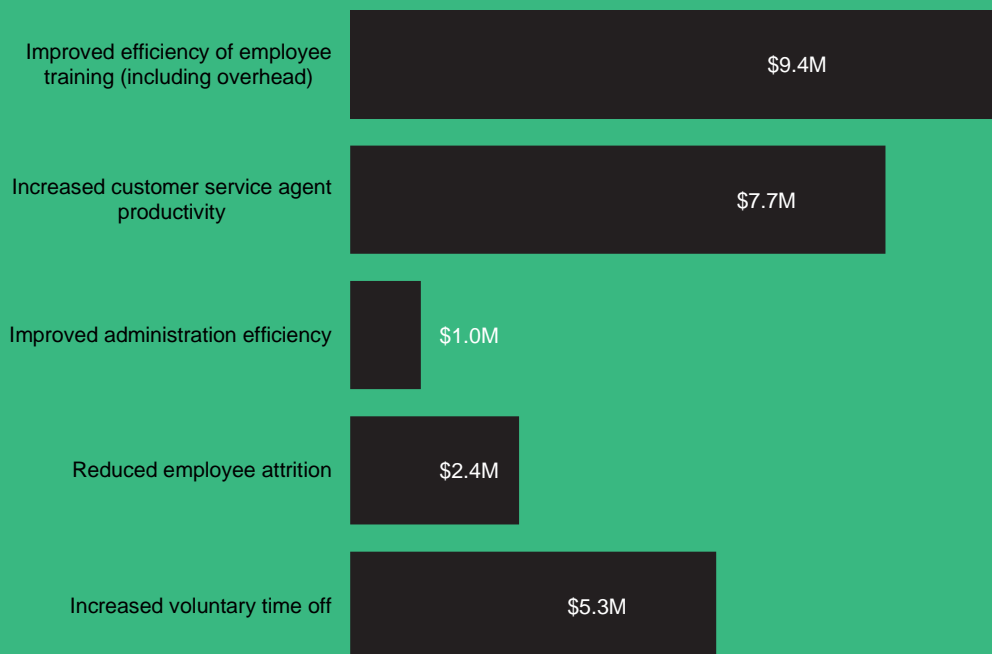
The decision-maker interviews and financial analysis found that a composite organization experiences benefits of \$25.83 million over three years versus costs of \$5.84 million, adding up to a net present value (NPV) of \$19.98 million and an ROI of 342%.

“One of the beautiful things about this tool is you plug it into your existing environment. It’s a relatively light lift from an IT and administration perspective, but the value is significant”

Head of customer experience, media and communications



Benefits (Three-Year)



I wouldn't go into an organization and not consider this application to be table stakes at this point. Intradiem is a critical component to deliver what call center workforce management is supposed to deliver.

Head of customer service, health insurance

TEI FRAMEWORK AND METHODOLOGY

From the information provided in the interviews, Forrester constructed a Total Economic Impact™ framework for those organizations considering an investment in Intradiem.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the impact that Intradiem can have on an organization.

DISCLOSURES

Readers should be aware of the following:

This study is commissioned by Intradiem and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in the Intradiem.

Intradiem reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

Intradiem provided the customer names for the interviews but did not participate in the interviews.



DUE DILIGENCE

Interviewed Intradiem stakeholders and Forrester analysts to gather data relative to the Intradiem.



DECISION-MAKER INTERVIEWS

Interviewed four decision-makers at organizations using Intradiem to obtain data with respect to costs, benefits, and risks.



COMPOSITE ORGANIZATION

Designed a composite organization based on characteristics of the interviewees' organizations.



FINANCIAL MODEL FRAMEWORK

Constructed a financial model representative of the interviews using the TEI methodology and risk-adjusted the financial model based on issues and concerns of the decision-makers.



CASE STUDY

Employed four fundamental elements of TEI in modeling the investment impact: benefits, costs, flexibility, and risks. Given the increasing sophistication of ROI analyses related to IT investments, Forrester's TEI methodology provides a complete picture of the total economic impact of purchase decisions. Please see Appendix A for additional information on the TEI methodology.

The Intradiem Customer Journey

■ Drivers leading to the Intradiem investment

Interviewed Decision-Makers			
Interviewee	Industry	Region	Average number of contact center agents
Head of customer experience	Media and communications	Canada	9,500
Head of customer service	Health insurance	United States	9,000
VP of operations	Financial services	United States	2,650
Senior director of business planning	Education technology	United States	1,000

KEY CHALLENGES

Before investing in Intradiem, the interviewees' organizations managed their contact centers using common industry systems, such as automatic call distributor (ACD) systems, WFM software, and learning management systems (LMS). However, constantly changing conditions and large volumes of real-time data generated in the organizations' contact centers made it challenging to optimize the quality and efficiency of operations. Time spent on manual, low-level tasks limited the ability of supervisors, trainers, and WFM analysts to effectively monitor agent productivity, provide support, deliver training, and find ways to improve contact center operations.

The interviewees shared common challenges prior to their organizations' Intradiem investments, including:

- **Inefficient and ineffective training practices.** Interviewees said scheduling overhead time that was wasted on agent trainings often far exceeded the length of the actual instructional content. It was challenging to find available times for agent trainings, and scheduling inefficiencies led to longer sessions. All of this lowered retention of the subject matter.
- **Inability of management to monitor agents in real time.** Decision-makers recognized that being unable to monitor all agents on the contact-

center floor consistently and thoroughly contributed to inefficiencies and missed opportunities to provide timely support. The shift to distributed workforces due to the COVID-19 pandemic only exacerbated the challenge.

- **Time-consuming, manual processes for scheduling and coding staffing levels and training sessions.** Supervisors, WFM analysts, and trainers were bogged down and spent an inordinate amount of time on scheduling-related tasks that were unrewarding and added little value.
- **The expense and loss of experience due to high employee attrition rates.** Interviewees said costs related to finding, hiring, and training staff to replace employees who left, plus the lower productivity of new hires considerably impacted the profitability of their organizations' contact centers.
- **Aligning schedules to meet competing goals of economy and effective service levels.** Planning staffing levels relied on historical data. However, constantly changing conditions meant the organizations' contact centers were often understaffed or overstaffed to handle real-time interaction volumes effectively and efficiently.

SOLUTION REQUIREMENTS/INVESTMENT OBJECTIVES

The interviewees' organizations searched for a solution that could:

- Integrate with its existing WFM and ACD systems.
- Improve agent monitoring and management.
- Increase the productivity of each agent while reducing employee burnout.
- Improve the efficiency of scheduling, training delivery, and other administrative tasks.

COMPOSITE ORGANIZATION

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an ROI analysis that illustrates the areas financially affected. The composite organization is representative of the four decision-makers that Forrester interviewed and is used to present the aggregate financial analysis in the next section. The composite organization has the following characteristics:

Description of composite. The composite organization is based in North America and has contact centers that support global operations. Prior to implementing Intradiem, agents often felt overworked and under-supported. Supervisors, trainers, and WFM teams spent large portions of their time on low-level manual tasks that limited their ability to focus on coaching, teaching, and analysis tasks that are more personally rewarding and beneficial to the company. As a result, high employee turnover for workers in roles across the contact center floor was an ongoing challenge.

The company used ACD and WFM systems, but it was difficult to respond to the large volume of real-time data generated in its contact centers in near real time when the data was most relevant. Scheduling for staffing and trainings heavily depended on historical trending information and required time-consuming

manual recoding to deal with constantly changing conditions.

Deployment characteristics. The composite organization uses Intradiem to find new efficiencies and to optimize operations in its contact centers. It has 5,500 seat licenses, and most of the licenses are for the company's 5,050 agents. The rest are distributed among supervisors, trainers, and WFM analysts. The company starts with several use cases to reduce shrinkage, increase training efficiency, and find other efficiencies, then it utilizes its Intradiem customer-success manager to train employees on system usage, to help optimize use cases, and to select which use cases the company will add in subsequent years to drive further savings.

Key assumptions

- **5,050 contact center agents**
- **Uses ACD, WFM, and LMS systems**
- **Uses classroom-setting trainings**
- **Uses historical data to guide staffing levels**

Analysis Of Benefits

■ Quantified benefit data as applied to the composite

Total Benefits						
Ref.	Benefit	Year 1	Year 2	Year 3	Total	Present Value
Atr	Improved efficiency of employee training (including overhead)	\$3,340,737	\$3,813,750	\$4,305,852	\$11,460,339	\$9,423,943
Btr	Increased customer service agent productivity	\$3,094,139	\$3,094,139	\$3,094,139	\$9,282,418	\$7,694,667
Ctr	Improved administration efficiency	\$409,303	\$409,303	\$409,303	\$1,227,909	\$1,017,876
Dtr	Reduced employee attrition	\$876,000	\$984,000	\$1,092,000	\$2,952,000	\$2,430,023
Etr	Increased voluntary time off (VTO)	\$2,036,160	\$2,121,000	\$2,205,840	\$6,363,000	\$5,261,227
	Total benefits (risk-adjusted)	\$9,756,340	\$10,422,193	\$11,107,135	\$31,285,667	\$25,827,736

IMPROVED EFFICIENCY OF EMPLOYEE TRAINING (INCLUDING OVERHEAD)

Evidence and data. Upon implementing Intradiem, interviewees' organizations increased the efficiency of scheduling and delivering training while greatly reducing nonproductive off-phone time that agents previously incurred as they completed classes. Intradiem used automation to find pockets of availability for trainings, often during times that would not have been possible before. Training delivery was less disruptive to the contact center floor, as fewer CSRs needed to be in training simultaneously. Labor costs were further reduced by minimizing rescheduling and the use of overtime for training delivery.

- Interviewees said saving on training-related activities was their organizations' most significant benefit. Using Intradiem improved the efficiency of scheduling, delivering, and completing trainings.
- Prior to using Intradiem, scheduling-related overhead for contact center agent trainings often exceeded the amount of training content actually

delivered. After implementation, trainings were individually delivered to agents during times of availability, which reduced time wasted while waiting for multiple agents to begin a class. Managers saved additional time by using Intradiem to automatically see who completed classes and monitoring how long agents spent on the training.

"Training is the most valuable benefit. That's what we've been able to bank hard dollars on."

Head of customer service, health insurance

- Employee effort on the low-level task of scheduling trainings was redirected to other value-added activities. Prior to using Intradiem, coordinating one training required supervisors or WFM analysts to spend 20 to 30 minutes manually scheduling and another 15 minutes rescheduling employees who missed the class. With Intradiem, scheduling time was reduced to just a couple of minutes, and rework was eliminated because the platform automatically

looped back on employees who missed a training.

- Intradiem's automation reduced the labor demand on trainers for planning and delivering instruction. The impact of this benefit increased year over year as interviewees' organizations transitioned more classes to the platform, encouraged broader use of Intradiem capabilities, and optimized the rules engine governing the training use case.
- Improved efficiency of training delivery encouraged trainers and supervisors to increase the volume of instructional and coaching sessions provided to contact center agents. A head of customer service at a health insurance company stated: "The real value we got out of Intradiem is delivering literally thousands and thousands of on-demand trainings, and it just kept growing. We're doing more training sessions along with group huddles and coaching."

"The hardest challenge to providing a really great customer experience is to have frontline team members who are current, knowledgeable, engaged, motivated, and focused on delivering great experiences. Intradiem really helps drive that because we can speed information to agents in near real time and in an easy-to-consume way."

Head of customer experience, media and communications

- Interviewees' organizations started their implementations by focusing on training savings and then expanded into other applications. A VP of operations in financial services said, "Training was the big one when we first started, but then we started to layer in other task-oriented use cases."

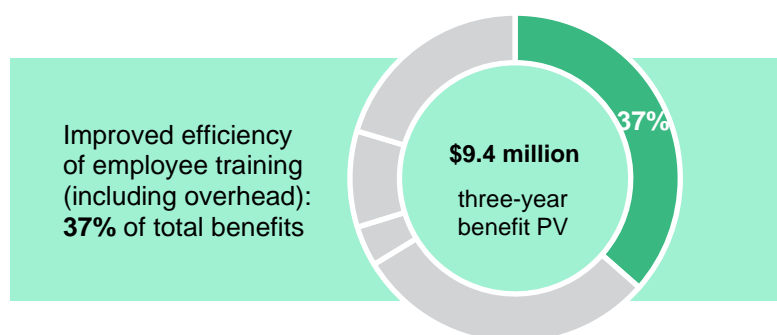
Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Trainers shift an increasing percentage of trainings to automatic delivery each year.
- The overall volume of trainings provided increases each year due to newfound efficiencies.
- The average fully burdened compensation rate for a contact center agent is \$21 per hour.

Risks. The impact of this benefit may vary depending on:

- The overall volume of training hours the organization provides contact center agents.
- The extent and pace at which the organization automates training scheduling and delivery.
- Labor rates, which will vary based on the organization's industry, region, and market conditions.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$9.4 million.



Improved Efficiency Of Employee Training (Including Overhead)					
Ref.	Metric	Source	Year 1	Year 2	Year 3
A1	Number of customer service agents	Composite	5,050	5,050	5,050
A2	Customer-service agent training-related time per year including training and scheduling overhead (hours)	Composite	38	40	42
A3	Customer-service agent training-related shrinkage reduction	Interviews	70%	75%	80%
A4	Customer-service agent hourly cost	TEI standard	\$21	\$21	\$21
A5	Subtotal: Customer-service agent in-class training shrinkage reduction and compression	$A1 \times A2 \times A3 \times A4$	\$2,820,930	\$3,181,500	\$3,563,280
A6	Number of trainers	Composite	50	50	50
A7	Trainer burdened salary	TEI standard	\$66,000	\$66,000	\$66,000
A8	Trainer labor reallocation	Interviews	25%	30%	35%
A9	Subtotal: Trainer labor cost reduction	$A6 \times A7 \times A8$	\$825,000	\$990,000	\$1,155,000
A10	Number of staff members with training-scheduling activities	Composite	20	20	20
A11	Training-scheduling activities labor demand	Interviews	10%	10%	10%
A12	Training-scheduling labor reduction	Interviews	50%	50%	50%
A13	Training scheduler burdened salary	TEI standard	\$66,000	\$66,000	\$66,000
A14	Subtotal: Training-scheduling productivity improvement	$A10 \times A11 \times A12 \times A13$	\$66,000	\$66,000	\$66,000
At	Improved efficiency of employee training (including overhead)	$A5 + A9 + A14$	\$3,711,930	\$4,237,500	\$4,784,280
	Risk adjustment	↓10%			
Atr	Improved efficiency of employee training (including overhead) (risk-adjusted)		\$3,340,737	\$3,813,750	\$4,305,852
Three-year total: \$11,460,339			Three-year present value: \$9,423,943		

INCREASED CUSTOMER-SERVICE-AGENT PRODUCTIVITY

Evidence and data. Interviewees' organizations applied Intradiem's intelligent automation capabilities to improve the efficiency of agents' off-phone tasks, such as training and after-call work (ACW). Decision-makers modified the flexible rules engine governing Intradiem use cases to best support their organizations' environments. Agents' on-phone work productivity increased by minimizing schedule-related

distractions, providing reminders, and delivering timely support.

- Interviewees said large volumes of real-time data generated in contact centers made it challenging to focus on value-adding tasks. Decision-makers said they appreciated that Intradiem intelligently automated many managers' and WFM teams' low-value tasks so they could focus on value-adding actions, such as improving processes and providing immediate support for difficult calls.

- Intradiem enabled interviewees' organizations to increase the productivity of their existing pools of agents. These gains lessened the need to hire additional agents and helped improve margins in contact centers.

“Intradiem increases the available work time or the yield realized from the resources that we have. It’s about a 5% gain in what I call ‘workforce effectiveness.’ In the call-center world, that’s massive.”

Head of customer experience, media and communications

- Interviewees' organizations used Intradiem to monitor agent actions and to create reminders for productive behaviors, such as minimizing the time spent on ACWs or in other nonproductive states. A head of customer experience in the media and communications industry said, “There was a lot of unmanaged shrinkage or lost capacity, and one of the biggest drivers to get Intradiem was to get to the point where we could easily manage it.”
- Decision-makers appreciated having rules to minimize schedule-related distractions that drove efficiency while still helping agents to feel supported. A senior director of business planning at an education technology company said: “Agents really love that Intradiem reminds them of a break coming in 10 minutes. They also love the rule that if they’re not on a phone call 5 minutes before the break, the system puts them on their break early so they don’t miss it. Now they don’t try avoiding calls before the break.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite implements use cases to maximize agent availability for incoming interactions.

- The composite implements use cases to increase off-phone task efficiency.
- The average fully burdened salary for a contact-center agent is \$43,600 annually.

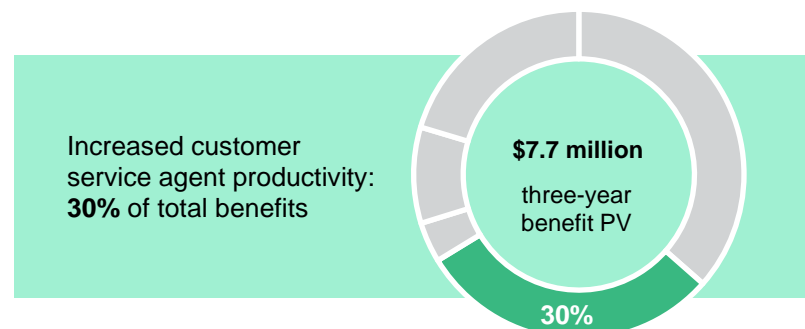
Risks. The impact of this benefit may vary depending on:

- The Intradiem use cases implemented and the degree of utilization and optimization by the organization.
- Organization industry, and prevailing labor rates.
- Market or industry conditions that influence the volume, length, or complexity of interactions.

Results. To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV of \$7.7 million.

“Good employees will actually latch onto the system and use it for their benefit. ... Employees who are trying to make careers really value the tool, and they try to utilize it to its most potential.”

Senior director of business planning, education technology



Increased Customer-Service-Agent Productivity					
Ref.	Metric	Source	Year 1	Year 2	Year 3
B1	Customer-service-agent productivity demand (FTE)	B2 _{py} *1.05	5,303	5,303	5,303
B2	Customer-service-agent count	Composite	5,050	5,050	5,050
B3	Customer-service-agent hires avoided (FTE)	B1-B2	253	253	253
B4	Percent of avoided hires attributable to Intradiem	Interviews	33%	33%	33%
B5	Customer-service-agent burdened salary	TEI standard	\$43,600	\$43,600	\$43,600
Bt	Increased customer-service-agent productivity	B3*B4*B5	\$3,640,164	\$3,640,164	\$3,640,164
	Risk adjustment	↓ 15%			
Btr	Increased customer-service-agent productivity (risk-adjusted)		\$3,094,139	\$3,094,139	\$3,094,139
Three-year total: \$9,282,418			Three-year present value: \$7,694,667		

IMPROVED ADMINISTRATION EFFICIENCY

Evidence and data. Interviewees said their organizations used Intradiem to inject automation into previously manual processes for coding absences and other scheduling-related contact-center tasks. Upon deploying Intradiem, the organizations reduced the labor spent on administrative and scheduling-related tasks by 25%.

“I’ve seen a lot of technologies come along and make a lot of big promises, so when Intradiem came along, I was very skeptical. But they met and exceeded every metric. I went from extraordinarily skeptical to won over within the first year.”

Senior director of business planning, education technology

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Prior to using Intradiem, coding absences and other scheduling-related activities were

predominately manual tasks and supervisors or employees in similarly compensated roles were typically responsible for them.

- The average fully burdened salary for a contact center supervisor is \$66,150 annually.

Risks. The impact of this benefit may vary depending on:

- The volume and labor cost of employees responsible for scheduling-related tasks.
- The extent and pace at which the organization adds automation from Intradiem to streamline scheduling.
- The level of automation previously applied to the organization’s scheduling-related activities.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV of \$1.0 million.

Improved Administration Efficiency

Ref.	Metric	Source	Year 1	Year 2	Year 3
C1	Number of supervisors	Composite	275	275	275
C2	Supervisor burdened salary	TEI standard	\$66,150	\$66,150	\$66,150
C3	Scheduling activities labor demand	Interviews	10%	10%	10%
C4	Scheduling labor reduction	Interviews	25%	25%	25%
Ct	Improved administration efficiency	C1*C2*C3*C4	\$454,781	\$454,781	\$454,781
	Risk adjustment	↓10%			
Ctr	Improved administration efficiency (risk-adjusted)		\$409,303	\$409,303	\$409,303
Three-year total: \$1,227,909			Three-year present value: \$1,017,876		

REDUCED EMPLOYEE ATTRITION

Evidence and data. Interviewees said that upon implementing Intradiem, their organizations' employee attrition rates in contact centers declined. They said Intradiem minimized the time employees needed to spend on their more tedious tasks, provided informational pop-up notifications, facilitated coaching and support, and helped employees feel more connected to their teams and supported by their company. These benefits improved job satisfaction for agents, supervisors, WFM analysts, and trainers, which played a role in reducing employee turnover.

- Interviewees noted that high turnover rates are endemic to the contact-center industry and that they are significant drivers of expenses. As a result, reducing the need to find, hire, and train employees and dealing with lower productivity from new employees is a particularly appealing benefit. A head of customer experience in the media and communications industry said, "The impact of having lower attrition — even half a point lower — is huge."

- Frontline teams appreciated the automated reminders, easier access to information and exception support, increased training and coaching opportunities, and offers of surprise breaks or voluntary time off. A head of customer service in the health insurance industry said: "The agents are huge advocates. The delivery of off-phone time is still a great thing to all of the agents."
- Intradiem automated much of the work that supervisor and WFM teams previously completed manually. Turnover in these roles dropped as employees shifted focus to tasks such as coaching and analysis that were more valuable to their organizations and more personally rewarding. A senior director of business planning in the education technology industry said: "Our annualized attrition rate in the real-time group is 8%. I haven't seen any environment run anywhere close to that; it is usually at least 20% or so."

- Decision-makers established rules in Intradiem that helped reduce the volume of agent attrition by preventing queue hopping or other call-avoidance actions. Notifications sent to supervisors or WFM teams allowed them to catch and address many of the behaviors that might have otherwise led to termination.
- Customers recognized that controlling the rate of employee attrition was especially valuable due to pandemic-related disruption. Interviewees indicated that their hiring rate this year may be higher than normal to off-set attrition spurred by the shift to remote working and potential staffing impacts from noncompliance with any vaccine mandates.

“We have a very, very high employee engagement score. Despite the role being more complex than most other sorts of contact center customer service roles. And so, the things that we’ve done to simplify, or to make it easier for agents, Intradiem being one of those, have a lot of resonance.”

Head of customer experience, media and communications

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

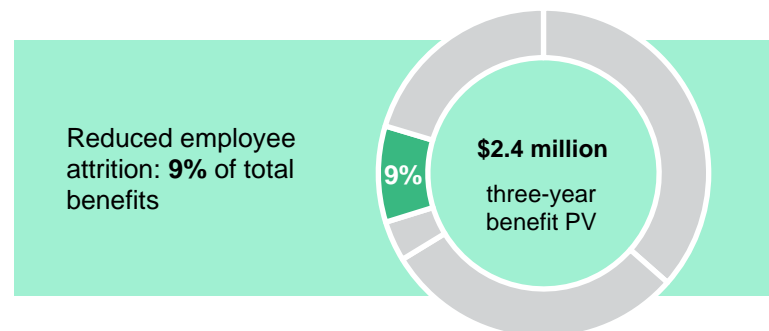
- Intradiem helps lower the employee attrition rate at multiple employee levels across the contact center, including agents, supervisors, workforce management agents, trainers, and other roles.
- Implementation of Intradiem is often accompanied by other initiatives that may also contribute to reducing employee attrition.
- 5,500 employees, 20% turn over=1,100 in chart below
- The cost estimate of \$15,000 for onboarding a contact center employee includes expenses

related to talent pool maintenance, hiring, and training, as well as an initial employee ramp-up period of lower productivity.

Risks. The impact of this benefit may vary depending on:

- Labor-market competitiveness in the organization’s industry or region.
- The proportion of requisitions that are filled via internal promotions.
- How effectively the organization communicates potential changes and how beneficial employees believe they are.
- The length and depth of professional training and certification required for the organization’s contact center roles.
- Costs attributed to maintaining a talent pool to quickly fill losses.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV of \$2.4 million.



Reduced Employee Attrition

Ref.	Metric	Source	Year 1	Year 2	Year 3
D1	Employee turnover prior to Intradiem	Composite	1,100	1,100	1,100
D2	Reduced turnover	Interviews	20.0%	22.5%	25.0%
D3	Percent of reduction attributed to Intradiem	Interviews	33%	33%	33%
D4	Reduction in turnover (FTE)	D1*D2*D3	73	82	91
D5	Cost of talent pool maintenance, recruiting, hiring, training per employee	Interviews	\$15,000	\$15,000	\$15,000
Dt	Reduced employee attrition	D4*D5	\$1,095,000	\$1,230,000	\$1,365,000
	Risk adjustment	↓20%			
Dtr	Reduced employee attrition (risk-adjusted)		\$876,000	\$984,000	\$1,092,000
Three-year total: \$2,952,000			Three-year present value: \$2,430,023		

INCREASED VOLUNTARY TIME OFF

Evidence and data. The Intradiem staffing use case monitored contact-center interaction volumes and staffing levels to automatically identify labor saving opportunities. Interviewees said they valued the ability to lower labor expenses and the ease with which they could identify VTO opportunities. Agents also appreciated the flexibility of having unexpected but voluntary time off.

- Intradiem provided real-time visibility into agent capacity and interaction demand. It sometimes found labor-saving opportunities just minutes after a shift started.
- Decision-makers said the staffing use case is a valuable tool for maintaining a lean contact center. A senior director of business planning in the education technology industry said: “It’s a business challenge to run most operationally efficiently during our low periods. Intradiem enables us to run at low staffing numbers and increase the amount of time agents voluntarily

take off as we find pockets of availability in the day.”

- Interviewees’ organizations achieved significant labor savings in Year 1, and decision-makers recognized the potential to increase the benefit through further optimization of the use case. A senior director of business planning in the education technology industry said their organization’s contact center with 1,000 agents saved between \$300,000 and \$350,000 in the first year. They said: “VTO pay is about 50% automated. By the time that we get the fully automated version up and running, we will probably increase VTO even further.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Contact-center employees are hourly wage earners, which enables corporate savings for accepted VTO.

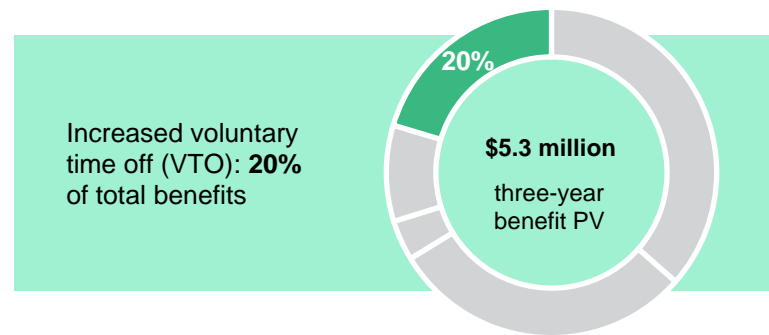
- Trust in the demand and capacity intelligence of Intradiem enables the composite's decision-makers to offer VTO to agents.
- Savings generated by providing VTO increase as the composite continues to optimize the rules engine of the staffing use case.
- As manager confidence in Intradiem capabilities increases, utilization of the staffing use case to find opportunities to offer VTO rises.

“If things were quiet and we were outperforming on service levels, we would have Intradiem deliver opportunities for people to take some time off. We would say, ‘Would you like to take the rest of the day off?’ That was nicely received during nonpeak periods. ... There are a lot of positives there.”

VP of operations, financial services

- The organization's distribution of hourly workers versus salaried workers across its contact centers.
- Manager training and confidence in the ability of Intradiem to accurately assess opportunities to offer VTO.
- The organization's ability to maintain adequate contact-center staffing levels.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV of \$5.3 million.



Risks. The impact of this benefit may vary depending on:

- The organization's compensation rate for agents and other employees offered VTO.

Increased Voluntary Time Off

Ref.	Metric	Source	Year 1	Year 2	Year 3
E1	Number of customer service agents	Composite	5,050	5,050	5,050
E2	Increased VTO per customer service agent, per year (hours)	Interviews	24	25	26
E3	Customer service agent hourly cost	TEI standard	\$21	\$21	\$21
Et	Increased voluntary time off	$E1 \times E2 \times E3$	\$2,545,200	\$2,651,250	\$2,757,300
	Risk adjustment	↓20%			
Etr	Increased voluntary time off (risk-adjusted)		\$2,036,160	\$2,121,000	\$2,205,840
Three-year total: \$6,363,000			Three-year present value: \$5,261,227		

UNQUANTIFIED BENEFITS

Additional benefits that Intradiem customers experienced but were not able to quantify include:

- **Improved employee satisfaction.** Interviewees said employees throughout their organizations' contact centers saw benefits powered by Intradiem. The platform's automation allowed workforce management analysts to support exception management and to focus on process improvements in real time. Likewise, supervisors and managers could spend more time coaching and developing their teams. The efficiency of training delivery encouraged learning and development teams to produce more content. Agents felt supported and became better at their jobs.

"You can't overstate the value of transitioning from transactional button pushing to be more analytical and thinking and interacting with people. It's much more satisfying at the end of the day when you solved problems, rather than just pushed a bunch of buttons."

Senior director of business planning, education technology

- **Improved content retention through shorter training sessions.** Interviewees said that prior to implementing Intradiem, the scheduling overhead needed to coordinate classroom training for multiple agents prohibited the use of short instructional sessions. Once the organizations could send individualized training directly to agents during pockets of availability, they were able to deliver short and targeted sessions. In addition to gaining flexibility, decision-makers also found that agents retained instructional materials better when they consumed them in smaller portions.

- **Having training traceability.** Interviewees said video-based trainings done outside of Intradiem were less effective than trainings with Intradiem. Agents would sometimes not see that training videos were emailed to them, so supervisors wasted time sending reminders and the agents wasted time searching for the missed emails. Using Intradiem, decision-makers easily confirmed when agents completed trainings and saw the amount of time spent on each session.
- **Secured the trust of internal stakeholders.** Several interviewees said the financial ROI for Intradiem exceeded their projections year after year. This track record helped the contact center during annual budget approvals. A head of customer experience in the media and communications industry said: "When I ask for capital to drive efficiencies, I get it. We've been doing a good job on things, and Intradiem is big part of that."
- **Having valuable customer success resources.** Interviewees said Intradiem customer success managers meet with them on a regular and recurring basis to help add new features, optimize existing use cases, and plan for upcoming innovations.

"We've had the same Intradiem relationship manager from the very beginning, and she's just been absolutely phenomenal. She has an excellent understanding of our business nuances, and she has been really good with guiding us."

VP of operations, financial services

- **Gaining Intradiem as a partner.** Interviewees said they value their relationships with Intradiem and the company's positive culture. A head of customer service in the health insurance industry said: "I don't even look at Intradiem as a vendor. I really look at it as an ongoing business partner."

- **Fostering a culture of ongoing innovation.** Intradiem introduces new use cases each year, and it continues to help its customers maximize the value of their investments. Interviewees said they appreciate Intradiem's commitment to ongoing evolution.

FLEXIBILITY

The value of flexibility is unique to each customer. There are multiple scenarios in which a customer might implement Intradiem and later realize additional uses and business opportunities, including:

- **Enabling the shift to remote working.** The pandemic upended the contact center industry, and Intradiem's SaaS-based solution facilitated a swift shift to remote work. The platform helped agents who were working from home to feel connected, it empowered supervisors to continue monitoring and coaching their teams, and it allowed organizations to deliver training to remote employees. Interviewees said minimizing the impacts of the disruption was invaluable to their organizations because they had to manage the remote-working shift while simultaneously supporting clients that faced radical changes to their own businesses.

technology integrated with automatic call distribution and learning management systems the organizations already had in place, so they didn't need to remove any programs. Intradiem also allowed decision-makers to identify which conditions would trigger particular business rules so they could nimbly respond to the constantly changing conditions in their organizations' contact centers.

- **Having automation-fueled agility.** The automation in Intradiem significantly reduced the amount of time that managers, trainers, and WFM teams spent on low-level manual tasks, and this provided them with the flexibility to focus on other value-add activities. Similarly, automation allowed agents to focus on the callers in front of them versus obsessing over the timing of breaks and the ends of shifts.

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in [Appendix A](#)).

“Our contact volume doubled, handle times increased, and our people were stressed out by the shift to a work from home environment. They lost face-to-face support they relied on, and it all happened within a matter of weeks. It was terrifying, but the fact we had Intradiem made the transition possible.”

Sr. director of business planning, education technology

- **Gaining a flexible technology solution and vendor.** Interviewees said they are impressed with the degree of flexibility with which their organizations could configure Intradiem to support their unique environments. Intradiem's

Analysis Of Costs

■ Quantified cost data as applied to the composite

Total Costs							
Ref.	Cost	Initial	Year 1	Year 2	Year 3	Total	Present Value
Ftr	Planning, implementation, licensing, and success management fee costs	\$605,000	\$1,925,000	\$2,142,800	\$2,288,000	\$6,960,800	\$5,844,917
	Total costs (risk-adjusted)	\$605,000	\$1,925,000	\$2,142,800	\$2,288,000	\$6,960,800	\$5,844,917

PLANNING, IMPLEMENTATION, LICENSING, AND SUCCESS-MANAGEMENT FEE COSTS

Evidence and data. The cost of Intradiem is comprised of licensing and a yearly success-management fee that includes training, support, and guidance on upcoming use cases on Intradiem's release roadmap. The initial cost includes a one-time implementation fee plus costs for internal planning and integration expenses for initial installation.

- Interviewees said implementation was smooth and straightforward and that prepackaged integrations with their organizations' existing ACD and WFM systems reduced the complexity of configuring Intradiem for their IT teams.
- Interviewees said adequate messaging about Intradiem's capabilities and how it supports agents, WFM analysts, and supervisors is key to ensuring full usage and maximizing ROI.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite incurs minimal yearly planning and implementation costs as new use cases are selected.
- Consistently hitting or achieving saving projections encourages decision-makers to increase the composite's investment by

implementing additional use cases in subsequent years.

- Initial planning and implementation costs include internal planning and IT costs for integration to the contact-center management system and other applications.
- The composite incurs ongoing implementation expenses as the company adds new use cases.

Risks. The impact of this cost may vary depending on:

- The cost of licensing, which will vary based on negotiated terms.
- Success-management fees and licensing costs, which will vary based on volume discounting or special arrangements.
- Integration and implementation costs, which will vary depending on the number and complexity of applications to be integrated.
- Planning and implementation costs, which will vary based on labor the organization dedicates to rule-engine design and optimization.

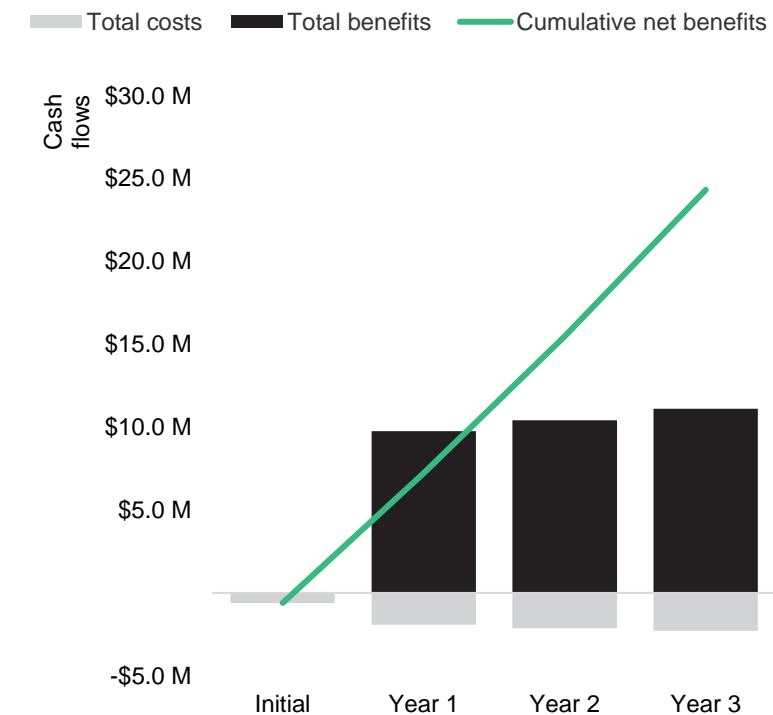
Results. To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$5.8 million.

Planning, Implementation, Licensing, And Success Management Fee Costs						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
F1	Success management fee (including training) and licensing	Composite	\$0	\$1,710,000	\$1,908,000	\$2,040,000
F2	Planning and implementation	Composite	\$550,000	\$40,000	\$40,000	\$40,000
Ft	Planning, implementation, licensing, and Success Management Fee costs	F1*F2	\$550,000	\$1,750,000	\$1,948,000	\$2,080,000
	Risk adjustment	↑10%				
Ftr	Planning, implementation, licensing, and Success Management Fee costs (risk-adjusted)		\$605,000	\$1,925,000	\$2,142,800	\$2,288,000
Three-year total: \$6,960,800			Three-year present value: \$5,844,917			

Financial Summary

CONSOLIDATED THREE-YEAR RISK-ADJUSTED METRICS

Cash Flow Chart (Risk-Adjusted)



The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.

These risk-adjusted ROI, NPV, and payback period values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

Cash flow analysis (risk-adjusted estimates)						
	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	(\$605,000)	(\$1,925,000)	(\$2,142,800)	(\$2,288,000)	(\$6,960,800)	(\$5,844,917)
Total benefits	\$0	\$9,756,340	\$10,422,193	\$11,107,135	\$31,285,667	\$25,827,736
Net benefits	(\$605,000)	\$7,831,340	\$8,279,393	\$8,819,135	\$24,324,867	\$19,982,819
ROI						342%
Payback period						<6 months

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Appendix A: Total Economic Impact

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders.

TOTAL ECONOMIC IMPACT APPROACH

Benefits represent the value delivered to the business by the product. The TEI methodology places equal weight on the measure of benefits and the measure of costs, allowing for a full examination of the effect of the technology on the entire organization.

Costs consider all expenses necessary to deliver the proposed value, or benefits, of the product. The cost category within TEI captures incremental costs over the existing environment for ongoing costs associated with the solution.

Flexibility represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. Having the ability to capture that benefit has a PV that can be estimated.

Risks measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on "triangular distribution."

The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.



PRESENT VALUE (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feed into the total NPV of cash flows.



NET PRESENT VALUE (NPV)

The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made, unless other projects have higher NPVs.



RETURN ON INVESTMENT (ROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.



DISCOUNT RATE

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.



PAYBACK PERIOD

The breakeven point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

Appendix C: Endnotes

¹ Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders.

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