Contact Center Capacity Plan

Complete one plan per queue or skill group for each planning period (usually monthly, looking 3 to 6 months ahead). Use the busiest representative interval for the Erlang C check, and weekly totals for the FTE calculation. Record assumptions so the plan can be checked against actual results.

1. PLAN DETAILS

Queue / skill group / line of business

Site(s)

Planning period (month or weeks covered)

Prepared by

Date and version

Hours of operation (days and times)

2. DEMAND FORECAST

Forecast contacts per week

Basis of forecast (history period, growth, seasonality, marketing or billing events)

Peak interval: day and time (e.g. Monday 10:00 to 10:30)

Forecast contacts in peak interval

Interval length (minutes)

☐ 15 ☐ 30 ☐ 60

Average handle time, seconds (talk + hold + after-call work)

Channel mix if blended (voice / chat / email %)

3. SERVICE TARGETS

Service level target (e.g. 80% answered in 20 seconds)

Average speed of answer target (seconds)

Maximum planned occupancy (%)

Abandon rate target (%)

4. AGENTS REQUIRED IN THE PEAK INTERVAL (ERLANG C)

Traffic intensity in Erlangs = contacts x AHT (seconds) / interval length (seconds)

Agents required on phones to meet service level (from Erlang C calculator)

Resulting service level (%)

Resulting average speed of answer (seconds)

Resulting occupancy (%) = Erlangs / agents

5. SHRINKAGE

Planned PTO and holidays (%)

Unplanned absence and tardiness (%)

Breaks (paid) (%)

Training, coaching and meetings (%)

System downtime and other (%)

Total shrinkage (%)

Agents to schedule in peak interval = agents required / (1 - shrinkage)

6. FTE REQUIREMENT FOR THE WEEK

Workload hours = weekly contacts x AHT (seconds) / 3,600

Staffed hours needed = workload hours / planned occupancy

Paid hours needed = staffed hours / (1 - shrinkage)

Paid hours per FTE per week

FTE required = paid hours needed / paid hours per FTE

Schedule efficiency adjustment (%) and adjusted FTE required

7. SUPPLY AND GAP

Current production FTE (excluding agents in training and nesting)

Agents in training / nesting and expected graduation dates

Expected monthly attrition (% and agents)

Planned transfers, promotions or leaves

Projected production FTE at start of planning period

FTE gap (required - projected); negative = surplus

8. HIRING AND ACTION PLAN

Training + nesting length (weeks)

Expected loss during training and nesting (%)

Graduates needed = (FTE gap + attrition during lead time) / FTE per agent

Class size to start = graduates needed / (1 - training and nesting loss)

Offers to make (allow for no-shows and declines)

Class start date(s) and required offer-acceptance date

Other levers if hiring cannot close the gap (overtime, cross-skilling, outsourcing, self-service, schedule changes)

9. ASSUMPTIONS, RISKS AND APPROVAL

Key assumptions and risks

Last period: forecast vs actual volume, AHT and shrinkage

Approved by (operations) Date

Approved by (finance / HR) Date

Date