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WHY WORKFORCE PLANNING FAILS IN THE POST MORTEM

HOW TO MAKE
DEFENSIBLE
DECISIONS IN
MODERN
CONTACT
CENTERS

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PLANXPRESS

THE PULSE OF THE CONTACT CENTER

By Gary Boucher
35-year Contact Center Veteran & Founder of
110 Global, LLC.

Why Workforce Planning Fails in the Post-Mortem

Executive Summary

Workforce planning decisions are rarely judged at the moment they are made. They are judged **after outcomes are visible**, when service levels miss, costs rise, or leadership asks difficult questions.

Most workforce management (WFM) tools are designed to help teams *plan*. Far fewer help teams *explain*.

This gap creates a hidden but significant risk: operational leaders are expected to justify outcomes using tools that were never built for post-mortem accountability. Forecasts, schedules, and staffing models may be “good enough” going in, but offer little defensibility coming out.

This paper argues that workforce planning must evolve from a focus on prediction accuracy alone to a broader standard: **defensible decision-making**. Organizations that adopt this mindset reduce operational risk, improve leadership confidence, and make better decisions under uncertainty.

1. The Reality of Workforce Decision-Making

In theory, workforce planning follows a clean sequence:

Demand → Forecast → Staffing → Schedule → Execution

In practice, it looks very different.

- Forecasts are imperfect but accepted
- Schedules are constrained by labor rules and reality
- Tradeoffs are made implicitly, often under time pressure
- Risk is absorbed quietly by frontline leaders

Most organizations do not formally model alternatives. Decisions are shaped by experience, intuition, and precedent as much as math. This is not negligence—it is how planning works in real environments.

The problem is not that decisions are imperfect. The problem is that **the rationale behind them is rarely preserved.**

2. The Post-Mortem Moment

The true test of a workforce decision does not occur during planning. It occurs later.

Examples are familiar: - A service level dip during a training rollout - Overtime spikes after a volume surge - Customer complaints tied to understaffed intervals

When this happens, leadership asks questions like: - “Why didn’t we see this coming?” - “What assumptions were made?” - “What alternatives did we consider?”

At this moment, teams often discover that their tools can show *what* was planned—but not *why*.

The result is a defensive conversation rather than an analytical one.

3. Why Accuracy Alone Is Not Enough

Forecast accuracy is important. But accuracy alone does not protect organizations from scrutiny.

A 95% accurate forecast does not answer: - Why a specific decision was chosen - What other options were evaluated - What risks were knowingly accepted

Nor does it explain counterfactuals: - What if we had delayed training? - What if we had staffed to a different service level? - What if we had used a different shift mix?

Without the ability to answer these questions, organizations are forced to rely on hindsight explanations rather than evidence-based narratives.

4. The Missing Capability: Counterfactual Modeling

At the heart of most post-mortems is a counterfactual question:

“What would have happened if we had done something else?”

Traditional WFM tools are not designed to answer this.

They typically provide: - A single forecast - A single staffing plan - A single schedule

What they rarely provide is a **structured comparison of alternatives.**

Counterfactual modeling—systematically testing “what-if” scenarios—allows teams to: - Compare outcomes before decisions are made - Quantify tradeoffs between cost and service - Preserve a record of evaluated options

This capability transforms planning from an act of prediction into an act of risk management.

5. A New Standard: Defensible Workforce Planning

Defensible planning does not mean perfect outcomes. It means **transparent, explainable decisions**.

A defensible planning process has four characteristics:

1. **Deterministic logic** – Given the same inputs, results are reproducible
2. **Scenario comparison** – Alternatives are explicitly evaluated
3. **Explainable tradeoffs** – Impacts are quantified and understandable
4. **Auditability** – Decisions can be traced back to assumptions and versions

Under this standard, post-mortems change tone.

Instead of: > “We didn’t know this would happen.”

Teams can say: > “We evaluated this outcome, understood the risk, and chose the best option available.”

6. What Modern WFM Tools Must Provide

To support defensible planning, tools must evolve beyond static outputs.

At a minimum, modern WFM systems should: - Link forecasts directly to staffing and schedules - Allow controlled what-if simulations - Quantify impacts on service, cost, and coverage - Produce narrative explanations, not just tables - Preserve decision context over time

These capabilities are not about automation for its own sake. They are about **decision support under uncertainty**.

7. Implications for Practitioners

For workforce planners and operations leaders, defensible planning: - Reduces personal and organizational risk - Improves credibility with leadership - Enables proactive rather than reactive conversations - Supports continuous learning and improvement

Most importantly, it allows teams to move from “explaining failures” to “demonstrating judgment.”

8. Implications for Executives

For executives, defensible planning: - Improves confidence in operational decisions - Creates transparency into tradeoffs - Reduces reliance on hindsight explanations - Strengthens accountability without blame

Organizations that invest in decision defensibility tend to make **fewer surprises and better tradeoffs**.

Conclusion

Workforce planning will never be perfect. Uncertainty is unavoidable.

But unexplainable decisions are not.

The next evolution of workforce management is not higher accuracy alone—it is **defensible decision-making**.

Organizations that embrace this shift will spend less time justifying outcomes and more time improving them.

This paper is intended to advance thinking on workforce decision-making and operational accountability. It is not a product specification or sales document.

About the Author

With 35 years of hands-on experience in contact center management, Gary has led Workforce Management and control desks at top companies like MCI WorldCom, Gateway, and Acer. He has directed call center operations and shaped Customer Experience strategy for global organizations. Gary’s insights are grounded in real-world leadership, and a deep understanding of the challenges contact centers face every day. Gary is now the Founder and CEO of 110 Global, LLC, the makers of PLANXPRESS, an ai-driven WFM solution.

Contact Gary on email at: gary.boucher@110global.com.