

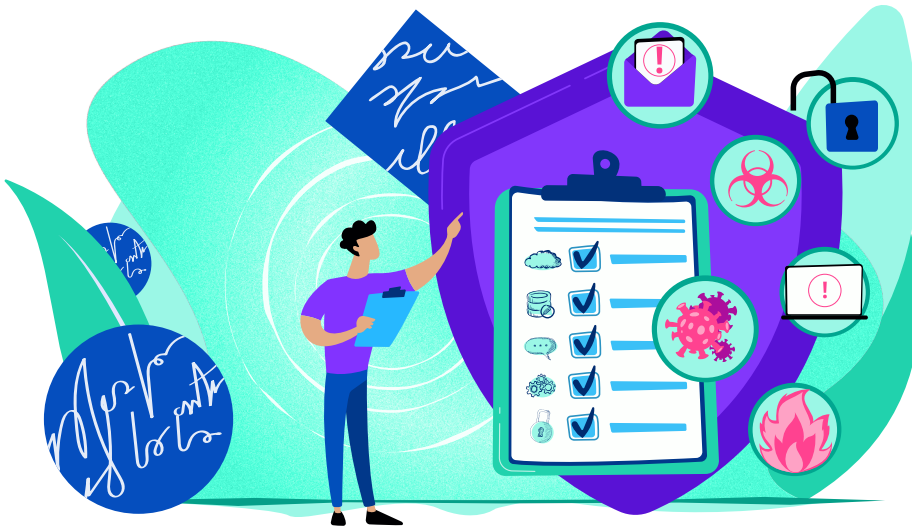
A NEW ERA CALLS FOR A NEW LEVEL OF RESILIENCY

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A NEW ERA CALLS FOR A NEW LEVEL OF RESILIENCY

It's time for a more comprehensive plan that extends beyond traditional BC/DR.

BY LORI BOCKLUND, STRATEGIC CONTACT



I am supposed to be at the Enterprise Connect conference in Orlando. This month's column was going to be about what I learned and share the value of conferences to contact center leaders, encouraging you to put them on your "to-do" list. But here I sit at home, just like everyone else, and I suspect that none of you will be signing up for a conference any time soon. So, let's redirect. We have entered a new era, and preparedness is more important than ever. I want to talk about *resiliency* from two angles—business continuity/disaster recovery (BC/DR) and volume agility.

Chances are you already knew that being prepared for disasters was important. Still, many haven't been able to prioritize that task and properly document, test and refine a formal BC/DR plan. Maybe your company focused on technology infrastructure impacts (e.g., data center or system down, power outage) and recovery (IT's plans). If you were prudent (or vulnerable to hurricanes), maybe you had something about facilities impacts and relocation to another site or service.

As we now know, to be ready and resilient, you need to cover a wide range of scenarios, including a pandemic with impacts beyond anything we could have imagined. For example, maybe your plan needs to simultaneously cover dramatic vol-

My Favorite Resiliency Enablers

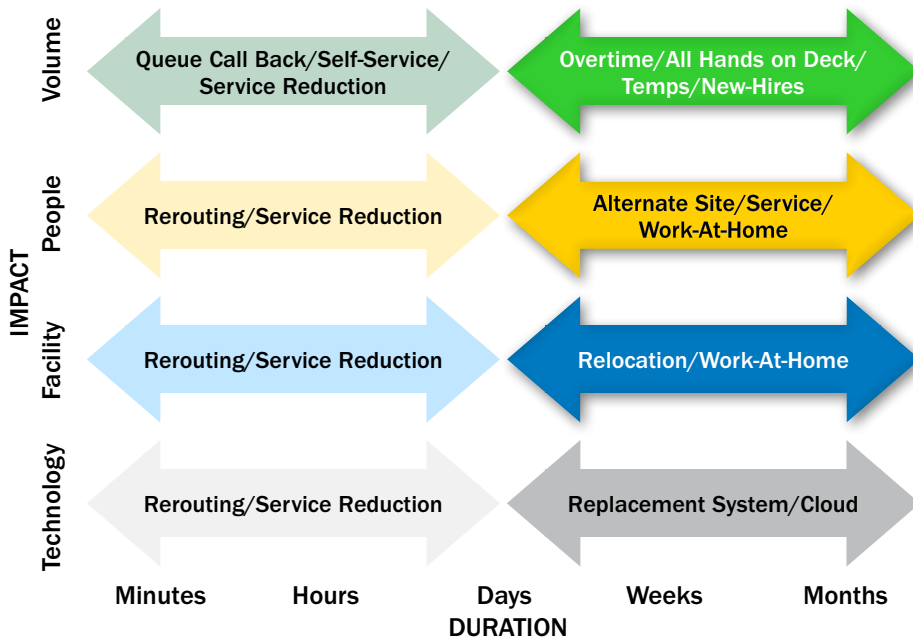
Technology can play a major role in supporting the resilience you need. I want to emphasize the most important ones in today's marketplace:

- CLOUD TECHNOLOGY:** While a premise-based solution can support remote workers, it's not inherently set up for anywhere, anytime operations like a cloud solution. Cloud has been rising for a while, and we can bet the pandemic has made it a preferred choice for even some of the most resistant buyers. In fact, many companies have scrambled over the last month to set up remote working, and the cloud vendors have pulled off some heroic feats. I encourage you to find the webinars and various other communications they've produced to show what is possible. Cloud offers agility on where people sit to do the work (including at home) and can quickly ramp up and down the number of users. And, a good cloud vendor has built-in redundancy in their systems and networks, providing inherent protection for technology impacting events.

- SELF-SERVICE:** Self-service, whether via IVR, web or mobile app, can aid the center and customers on a typical day and be a lifesaver in extreme circumstances. Combine it with cloud solutions that enable you to flex in capacity and you have a win-win.

- BOTS:** Artificial intelligence is all the rage and holds much promise for both customer-facing and agent-facing capabilities. A bot can readily boost that self-service capability, even adapting to the current situation (e.g., frequent questions about new government programs). And a bot aiding agents can help when less experienced people need to pitch in to handle the volume presented ("all hands on deck!"). If you don't have bots yet, focus on things like traditional self-service (per previous bullet) and **KNOWLEDGE MANAGEMENT**.

FIGURE 1: The Scope a Resiliency Plan Should Address



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ume swings and relocation of staff to home offices. You may have done that on the fly, and kudos to you! Going forward, everyone needs to be ready to respond to whatever

gets thrown at us with a formal, structured plan in place.

Formalize Your Resiliency Plan

Let's call the new plan a "Resiliency Plan" because it covers more than BC/DR. It can tap some of the same technologies and operational practices for unusual peak volumes and can provide the confidence that you have the agility you need for a variety of situations. This comprehensive plan will address events that can impact **facilities** (e.g., power outage, fire, storm, flood), **people** (e.g., virus, evacuation) and **technology** (e.g., network, systems and/or power failure), while also addressing volumes that exceed your monthly or seasonal patterns. The plan should address events of various durations, from minutes to months. (SEE FIGURE 1.)

The goals of a plan are:

- Minimize disruptions caused by events.
- Continue operations when events occur.
- Recover operations after catastrophic events.

As Figure 1 shows, short-lived events may be absorbed with a slight reduction in service, and chances are customers will understand. The longer events, like the one we're living in now (compounded by uncertain duration), can be make-or-break for a business and

its customer relationships. Things you do for day-to-day optimization, like self-service, can help in an emergency. And what you do with technology matters more than ever as you build resiliency into your infrastructure and applications. (SEE THE SIDEBAR, "My Favorite Resiliency Enablers.")

As you develop a Resiliency Plan, make sure it addresses a complete set of objectives:




- Identify and address the full range of business-impacting events with a level of prioritization based on probability and impact.
- Define Resiliency Team members (across IT and operations) and their roles.
- Provide a guide for the Team by defining procedures and identifying resources needed to assist in a timely response and recovery for the various scenarios.
- Identify employees and vendors that must be notified and engaged in the event of a disruption.
- Store and secure adequate backup materials off-site (including the plan itself!).
- Train assigned personnel on various aspects of the Plan, including adequate cross-training to reduce reliance on key personnel.
- Guide comprehensive tests of the Plan and modify/update the Plan as a result of the tests.
- Enable everyone to respond effectively and consistently, even perhaps training on event-driven changes (like work-at-home) as part of new-hire training and/or ongoing reminders.

If you don't have a plan or want a guide to updating the plan you have, we have a table of contents to help you get started (www.strategiccontact.com/tools/resiliency-plan/).

Keys to Success

The keys to success we have identified through lessons learned in writing, testing and executing plans include the following:

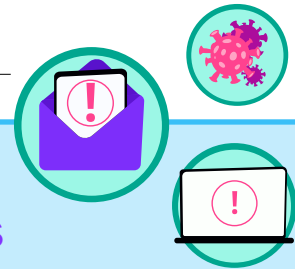
- Strong **sponsorship**. Success requires a culture that values (and sees the value in) these plans. That means allocating resources, investing in technology, and taking the time to test and update.
- A **cross-functional team** that makes decisions and can lead execution. IT and business leaders and trusted "in the trenches" staff work together to address technology, operations and staff needs.

Options to Enhance Capacity, Continuity and Recovery

Contact centers have many options to enhance resiliency, such as:

- Extra capacity
- Multiple sites that back each other up
- Self-service—IVR, web, mobile (including voice- or chatbots)
- Redundant technology
- Network routing options
- Cloud solutions
- Remote/home-based agents and/or satellite sites
- Alternate temporary sites
- Third-party services
- Reciprocal agreements between complementary centers



Home-Agent Approaches Deserve Special Attention

Many centers had previously ruled out home agents, fearing security risks, lacking the tools and processes for operational oversight, or just plain declaring it was not a cultural match. That all changed with the new world of social distancing and the lockdown edicts in various parts of the country. Even without government-driven declarations, many companies knew they had to do something to keep employees safe.

There's a good chance you scrambled to put home agents in place, maybe accepting risks you never would have under other circumstances. Regardless, as soon as you can muster the resources, you should review and refine any processes, technology and HR/legal policies you have in place, or if you don't have them, create them. We provide the following checklist to help you consider how to optimize this part of your resiliency plan.



TECHNOLOGY FOR FRONTLINE AGENTS

- Cloud or premise solutions approach
- Voice path (e.g., VoIP, WebRTC, phones or no phones, types of phones, headsets)
- Queue/performance visibility
- Data/systems access (e.g., Virtual Desktop Infrastructure such as Citrix, or all web-based)
- Core applications—including CRM, KM, email/IM/collaboration, etc.
- Network—capacity (e.g., minimum bandwidth required) and connectivity (including VPN requirements)
- Security (including sign-on, encryption)
- Licensing



TECHNOLOGY FOR SUPERVISORS AND OVERSIGHT

- Contact recording and quality monitoring
- Performance management tools (e.g., analytics, scorecards and dashboards)
- Instant messaging, communication and collaboration (e.g., persistent chat, video)



TECHNOLOGY MANAGEMENT

- Security/compliance/privacy policies and procedures
- Encryption requirements
- Technology Support



FACILITIES POLICIES

- Access controls
- Exclusivity of space (e.g., children, pets)
- Setup and supplies required/provided



HR, SUPERVISION AND OPERATIONS SUPPORT

- Job descriptions
- Hiring/qualifying for remote work
- Training—initial and ongoing
- Performance goals and reviews
- Coaching & development
- Scheduling
- Ergonomics
- Home-working policies and agreements



- A **comprehensive perspective** that considers all elements—people, technology, processes, facilities—and the role of all parties (including vendors).
- Detailed, thorough documentation routinely updated, accompanied by effective **communications** across the organization.
- Perhaps most importantly, consider **people first**, and recognize that they will think of their families first.

When Things Are Back to “Normal”

Hopefully, your center was able to respond

to the coronavirus situation without too much impact on your customers and staff. Chances are, things could have gone better. We don't know what the new normal looks like, or when it will be here, but we can't assume that things will ever be the same. I suspect these plans will take on a new importance. That being said, planning for unlikely events has been shoved down the priority list for years, and we must be cautious against that same complacency creeping in again. I've always viewed BC/DR plans like insurance: Nobody likes to pay for it, but you are really glad you have it when it's needed!

This new era demands a new level of preparedness and resiliency. Whether you have an existing plan that needs refreshing, or never had a formal one and became painfully aware of it, there has never been a better time to develop or update your plan. Put it at the top of your “to-do” list when we emerge from this unprecedented time. ☎



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