

Contact Center Remote Workforce “Best Practices”

Contact center managers look to industry “best practices” as they establish and grow home agent programs. There is no single recipe for success, as each center must account for its distinct business context, goals, and cost and resource constraints. Nonetheless, we offer the following considerations based on successful home agent programs across a broad array of clients. Use this list to stir your thinking on how to plan for or improve your remote workforce.

Strategy: The remote/home workforce program is aligned with and supports the contact center operations strategy

- The program advances the goals of the operations strategy through one or more of the following:
 - Expand the recruiting base
 - Access higher caliber applicants
 - Retain valuable employees (and therefore reduce recruiting and training costs)
 - Lower the wage scale
 - Reduce facilities costs or future requirements
 - Enhance scheduling flexibility and agility
 - Support disaster recovery
- An executive sponsor drives cross-functional buy in and ensures appropriate priorities are established
 - HR adjusts recruiting, hiring, and general employee training practices
 - Legal addresses policies and procedures, including agreements
 - IT implements and supports the enabling technology and addresses security concerns
- Contact type and media channels are appropriate for the remote/home workforce
 - Remote/home agents have access to the requisite applications, databases, and knowledge sources to meet customer requirements while protecting corporate interests

Personnel Selection: Remote workers have the appropriate skills and temperament as well as a suitable work environment

- The recruiting process reaches applicants for whom the convenience and flexibility of remote/home office work are valued
 - Target applicants may be more experienced with higher levels of education than their “brick and mortar” counterparts
- The screening and hiring processes select trustworthy individuals who are capable of functioning with limited oversight
 - Self-disciplined and organized
 - Capable of being their own first line of support for technical issues
 - Demonstrate the capacity to protect confidential information per company policies
 - Self-motivated and self-sufficient
- Each remote worker understands and signs a formal “remote worker” agreement that specifies:
 - Eligibility for remote/home office assignments
 - On-site time requirements
 - Required equipment, voice/data services, and office set-up with responsibilities for which party provides them
 - Off-hours system downtime policies and procedures including provisions for personal use (if any) and logout requirements
 - Data security requirements and availability/use of peripheral devices policy
 - Remote office requirements
 - Free of excess noise and distractions

- Adequate lighting
- Ergonomic work space
- Consistent with corporate safety standards
- Enforcement policies that include home office visits and/or submission of work space pictures
- The compensation policy documents a clear rationale for any variances between on-site and remote worker plans
 - Remote compensation plans might be lower due to an intrinsic value in working from home
 - Variances could tie to program goals and the division of work – e.g., remote workers handling a more complex contact types
 - Remote/home workers participate in incentive programs if made available to their on-site counterparts

Personnel Management: Operational policies and procedures provide the means for remote workers to be successful

- Training
 - Where possible, remote/home workers receive their training on the company premises
 - Web collaboration, conference/video calls, computer-based training, and eLearning augment classroom training and support continuous learning and skill development
 - Distance learning is delivered in short, discrete modules to mitigate the challenge of sustaining interest in the absence of human interaction
- Scheduling
 - Remote workers provide scheduling flexibility to accommodate peak hour periods and/or non-standard business hours and scheduling agility to rapidly respond to unexpected volumes
 - Schedules are reasonable to ensure high standards of quality and retention
- Performance and Quality Monitoring
 - Remote workers are held to the same standard of excellence as their on-site counterparts
 - Supervisors monitor remote worker performance in real-time
 - Supervisors have access to voice and screen recordings as a substitute for direct observation
 - Remote agents have the ability to see their actual performance against goals and review quality scores and call recordings

Technology: Remote workers have the technology tools to effectively serve customers and meet performance goals

- The core technology for remote workers includes a voice path (including phone or PC softphone, with headset), data connectivity, PC-based phone control capabilities (e.g., login/logout, workstate changes, queue visibility, reason codes, etc.), and PC or thin client with access to appropriate applications, databases, and knowledge sources
 - With acceptable tolerances for cost, voice quality, connection reliability, connection speed (voice and data), and data security
- Other technology enhances communication, supervision, collaboration, and employee engagement:
 - Instant messaging
 - Voice, data, and video conferencing
 - Desktop collaboration
 - Team chat groups
 - Wikis