

Contact Center Remote/Hybrid Workforce “Best Practices”

Contact centers developed Work-From-Home (WFH) programs to expand their recruiting base, retain valuable employees, enhance scheduling flexibility, and support disaster recovery and business continuity. COVID-19 precipitated a rapid expansion of WFH programs to protect the health and safety of contact center employees. An April 2021 5th Talent¹ WFH Survey focused on contact center agents finds that a whopping 66% of employees prefer to WFH, 30% prefer a mix of home and office work, and only 2% seek to work exclusively in the office. These numbers showed a significant change from the June 2020 study (46%, 48%, and 4% respectively) and emphasize the appeal of WFH.

Going forward, contact center managers look to industry “best practices” as they develop their WFH and Hybrid agent programs. While there is no single recipe for success, we offer the following considerations based on successful programs across a broad array of clients.

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

- The contact center management team secures approval for a staffing plan, support infrastructure, and operating budget consistent with goals for customer satisfaction, first contact resolution, and employee engagement
- An executive sponsor drives cross-functional buy-in, ensures that appropriate policies and procedures are established, and that support departments provide the resources the center needs
 - HR adapts its recruiting, hiring, and on-boarding processes to support WFH agents
 - Legal works with contact center management to develop agreements for WFH and Hybrid agents
 - HR and IT support contact center specific requirements for technology to meet a high standard of performance and equip agents for efficient and effective contact handling
 - IT provides dedicated staff to provide real-time support for WFH and Hybrid agents
- Contact center leadership creates an environment in which WFH employees feel like valued members of the community
 - New hires experience a highly organized onboarding process that adapts to their home office setup, familiarizes them with the company and its culture, provides introductions to coworkers, and delivers training and ongoing support
 - Senior leadership articulates priorities, provides regular updates, and celebrates successes all within the context of assigning meaning to agent contributions
 - Managers and Supervisors focus on helping agents advance their knowledge and skills, develop self-sufficiency, and build social connections with teammates and support personnel
 - Agents provide feedback on how the leadership and company support them and what could be done to improve their ability to meet goals and expectations
 - Leadership provides accountability on their plans for remediation
- Leadership provides a safe onsite environment for visiting, Hybrid, and full-time office workers
 - In addition to all regulatory provisions concerning occupational health and safety, the center adheres to guidelines set by federal, state, and local authorities to minimize the spread of infectious disease
 - Senior leadership provides context for the center’s rules and updates employees on changes
 - Supervisors and Team Leads translate high-level guidelines into what it means for the agent
 - Employees are provided a means to maintain safe distances in line with their comfort level

¹ <https://www.5thtalent.com/work-at-home-study-april-2021>

Personnel Selection: WFH and Hybrid workers have the appropriate skills, temperament, environment, and compensation

- Centers extend their geographic coverage and recruiting sources to elevate the quality of their candidate pool and increase agility when responding to disasters/business disruption
- Centers leverage digital technology to evaluate resumes off job boards, engage with candidates, assess skills, and automate the recruiting workflow
 - Job simulation tools may enable candidates to observe the pace, systems, technical savvy, and soft skills required for the position
- The screening process selects qualified individuals who are capable of functioning with limited oversight and demonstrate:
 - Self-discipline and initiative
 - Organizational skills
 - Competency in first line technical support
 - A high degree of personal integrity
- Each WFH and Hybrid worker signs a formal WFH agreement that specifies start date, scheduled hours, environmental requirements (e.g., free of excess noise and distractions, lighting, ergonomics, safety), technology requirements, up-time requirements, metrics and performance standards, general WFH policies (e.g., security, off-hours use, home inspections)
- The compensation policy documents a clear rationale for any variances between onsite and WFH/Hybrid agents
 - Variances could tie to labor markets, division of work, and/or technical requirements (e.g., subsidies for home Internet bandwidth)
 - WFH/Hybrid workers participate in incentive programs (aligned with onsite workers)

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

- Onboarding
 - The center follows a formal process for setting up the home office, testing all systems and network performance, and ensuring that new hires are ready for their first day of training
 - New hires receive an online resource guide with all policies and procedures as well as contacts for HR, benefits, training, tech support, contact center leadership and support personnel
 - Introductory emails share new hire bios, fun facts, and descriptions of upcoming assignments, and employees are encouraged to connect with new hires during their initial weeks on the job
 - Supervisors and/or Team Leads use online tools to simulate “walking by the desks” of new hires
 - New hires are matched with seasoned co-workers who answer questions, provide guidance, and help integrate them into the corporate culture
- Training
 - All training modules follow proven adult learning methodologies with content tied to company goals, performance metrics, and the customer experience
 - Distance learning is designed to maximize employee engagement
 - Instructor-led modules support whiteboard, real-time interaction, screen share, surveys, hand raise, chat, voice participation, group breakout, quizzes, recording
 - Each 90-minute session comes with a 10-minute break; “lectures” are capped at 30 minutes
 - Break-out sessions encourage participation in sample call assessments, role playing, and other team exercises
 - Fun exercises reinforce key points (e.g., CC Jeopardy, scavenger hunts, gamification)
 - Teach-back modules give participants the opportunity to demonstrate that they have grasped the contents of each module

- Web collaboration, conference/video calls, computer-based training, and eLearning support continuous learning and skill development
- Weekly check-ins and surveys solicit feedback on knowledge or skills needed to increase competency and comfort level with customer contacts.
- Scheduling
 - Leadership takes advantage of WFH for flexible scheduling to meet business needs and agent preferences – e.g., staggered start times, variable shift lengths, split shifts, flexible break times
 - Agents have access to a workforce management portal to view schedules, enter preferences, request changes
- Performance and Quality Monitoring
 - WFH agents understand the performance metrics for success in their roles
 - The center provides the requisite information, tools, and support resources to respond promptly to customer, process, or technical issues
 - Agents understand policies and resources to address various types of escalations
 - Contact center management utilizes tools to monitor and manage agent activity in real-time to ensure metrics attainment and agent compliance
 - Supervisors have access to voice and screen recordings as a substitute for direct observation
 - WFH agents can see their performance against goals and review quality scores and recordings
- Coaching and Communication
 - Supervisors conduct frequent check ins with their WFH agents to take the pulse of their work day and emotional well-being
 - The prescribed number of coaching sessions (e.g., two per month) are scheduled and conducted
 - Coaching sessions provide constructive feedback on agent performance while soliciting input on what's going well and opportunities for improvement
 - Supervisors ensure the employee feels seen, heard, and valued
 - Supervisors and/or Team Leads use huddles for updates and foster camaraderie through celebrations, personal sharing (e.g., meet my pet), online games, virtual gatherings, etc.

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

- WFH agents utilize an up-to-date premise- or cloud-based routing and reporting with built in redundancy that is accessible from remote locations
 - A business continuity plan addresses contact routing, staff availability, and access to systems, customer data, and other key information in the event of a disaster
- WFH agents use company-supplied hardware on which the requisite applications software, and security, encryption, and antivirus protocols have been installed and tested
 - Laptops provide an easy transition to the office for Hybrid workers
 - Agents use dual monitors to handle customer interactions and internal communications and have noise cancelling headsets to handle phone calls
- WFH agents install communications channels within acceptable tolerances for cost, voice quality, connection reliability, connection speed (voice and data), and data security
 - Agents plug desktop or laptop into a router with an ethernet card for faster connection
- All agents have access to a searchable, dynamic knowledge management platform to company policy, interaction handling guidance, and processes and procedures
 - The center provides adequate support resources to maintain the knowledge base
- AI-enabled intelligent agents supplement in-house training and act as real-time assistants to gather and present information during customer interactions
- The center provides a variety of tools to support virtual communities, such as:
 - Instant messaging and collaboration software – e.g., Slack, Microsoft Teams, WhatsApp groups
 - Voice, data, and video conferencing