



## Call Center At-Home Agent Best Practices

*Essential tools for managing employee performance, service quality and the customer experience*

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# Call Center At-Home Agent Best Practices

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## **Call Center At-Home Agent Best Practices**

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### **Executive Summary**

At-home agents deliver significant cost savings, greater flexibility, a deep, diverse and qualified labor pool and reduced staff churn for call centers. Other important benefits include reduced absenteeism, increased productivity, and enhanced customer satisfaction. At-home agents also present call center managers with a major and new management challenge – bringing out the best in people they cannot see. While managing remote staff is new for many companies, the knowledge worker management challenge dates back to the 1980's. At-home agents are knowledge workers who are connected to a company through its telephony infrastructure. Current call center technology provides centralized management for distributed networks, a set-up that can support at-home agents. Web-based workforce optimization suites with quality assurance, recording, workforce management, eLearning, coaching and performance management capabilities enable supervisors to track, record, schedule, monitor, communicate and manage remote agents. The key to successfully building an at-home agent program is to apply management best practices that are enabled by technology. This white paper explains how to do this and do it right.

### **Value Proposition**

With the US economy in recession and countries around the world facing similar economic woes, many call center managers are being asked to make sacrifices that could have a negative short-term effect on their organization, but are necessary for the good of the enterprise. These challenges may come in the form of unplanned staff reductions, decreases in service levels, elimination or postponement of investments, or reductions in training programs. The best leaders will respond by doing what is necessary for the health of the enterprise, while looking for creative ways to minimize any negative impact.

An effective way to reduce operating costs without adversely impacting the service level is to employ at-home agents. At-home agents can reduce the expenses associated with real estate, equipment, salary rates, benefits, training, hiring and business contingency planning. Using at-home agents can improve service quality and customer satisfaction, increase scheduling flexibility, and reduce staff-related expenses, while minimizing personnel cuts. Despite potential incremental overhead costs in the form of IT support, telecom expenses, systems to manage remote agents (eLearning, coaching, remote recording, performance management and quality assurance), and possibly supervisory and recruiting costs, agent-related expenses are likely to decrease by approximately 10% to 15%. Additionally, a number of case studies have shown that agent retention rates may increase by as much as 30%. These hard quantifiable benefits, accompanied by improvements in the customer and agent experience, make employment of at-home agents a winning strategy for companies.

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### Out of Site, Not Out of Mind

Driven by the need for flexibility and cost savings, managers in call centers throughout the U.S. are weighing the benefits and challenges of employing at-home agents. As technology is no longer an impediment, the most significant concern is how to manage remote agents who cannot be seen by their supervisors. This is of particular concern for single-site call centers that have never had agents based in multiple locations. The most important practice is to hire qualified agents – individuals who are self-starters, highly motivated, satisfy all competency and skill requirements, and have the right working environment at home.

Managers of multi-site call centers have already developed effective best practices for overseeing agents and supervisors in secondary locations. Below is a list of six leading management best practices that have been modified to address the needs of at-home agents.

1. Document job responsibilities, requirements, procedures, policies and time frames. This document needs to address all standard operating policies plus specific remote agent requirements.
2. Establish a three-month trial period to determine whether a new agent or a premise-based agent who "transfers" to a remote location can properly perform the job. (Formal trial periods minimize the loss of highly qualified agents who discover that they do not enjoy working at home.)
3. Schedule a *daily* communication session between supervisors and at-home agents. This will help reduce feelings of isolation and detachment. Part of each supervisor's job should be to ensure that at-home agents are kept informed of all work-related and team-oriented social activities.
4. Use chat for handling most agent inquiries. Supervisors should be available to respond immediately to chat inquiries from at-home agents. (Real-time messaging and broadcasting capabilities are also essential for communicating issues that require immediate attention.)
5. Include remote agents in all team meetings and up-training activities.
6. Design rewards, incentives and team-building activities to accommodate both home-based and in-house staff.

### Training and Coaching

Coaching is the most successful approach for training adults and, therefore, call center agents, regardless of where they are based. What's most important is to consistently provide feedback to agents on a timely basis. Figuring out how to conduct introductory training is likely the biggest challenge that enterprises confront when they decide to use at-home agents. Some companies avoid this issue by allowing currently employed (and

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trained) agents to work from home. Other organizations require all new hires/contract employees to be on-site for a 2- to 4-week training period. Both of these approaches work, though they offset some of the benefits of using remote agents. Just as universities grant doctorates to people who attend online programs, companies can use eLearning systems and ongoing quality assurance (QA) feedback to deliver effective introductory and ongoing agent training. Here is what they need to do:



Create an online training program that addresses everything that premise-based agents are taught – products, systems and general company information. Trainers and supervisors must be available to review and assist at-home agents with training challenges. The program should include practice call/email handling sessions and a “nesting” period where newly trained agents have a higher supervisor-to-agent ratio.



Select an eLearning application that makes it easy to create and deliver content, measure its effectiveness, assess agent competency, and provide shared training sessions supported by premise-based trainers and supervisors.



The eLearning application must be able to simulate call and email handling situations so that trainees can get a feel for what they are going to confront in the call center.



The solution should track eLearning and coaching sessions and monitor incremental improvements, skill proficiency and new skills acquired. It should also be able to directly tie QA scores to training/coaching sessions.



The eLearning application should be able to automatically deploy courses based on agent needs, as identified by the QA program or a supervisor. The application should include a library of courses so that all agents, whether based at-home or on-site, can manage their own development.

Coaching is a high-value activity that improves agents’ satisfaction and enhances their skills and effectiveness. Tactical coaching applications share best practices, new policies and procedures, and allow real-time intervention to address agent performance issues. When coaching is used in conjunction with an eLearning system, remote agents can be as fully trained as premise-based staff. Surprisingly, off-site agents may be better trained, as the automated training systems can be set to allow zero tolerance for performance deviations. Here are some highly effective call center coaching best practices for remote agents (many of which also work well for premise-based agents):



The coaching solution should support two-way communication between supervisors and agents.






Coaching should be customized to the needs of each agent. To optimize call center performance, each coaching session should be scheduled by

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-  Coaching sessions should facilitate recognition and communication of agents' performance strengths and opportunities. This is a great way to keep at-home agents motivated and to foster a team spirit.
-  The coaching application should be able to bookmark call segments that require attention, annotate quality evaluations with comments and tips, and link them to the relevant call and screen for agent review. Coaching packages should be delivered directly to the agent desktop.
-  Supervisors should be able to use the coaching application to create and distribute best practice clips based on real examples of service/sales excellence. This is critical for at-home agents, who have no other way to listen and learn from their peers.

### Quality Assurance Best Practices

Quality assurance applications are important for premise-based call centers and essential for remote agents, whether they work from home or a branch office. Remote agents require a constant stream of feedback to keep them in sync with evolving call center practices.

While quality assurance applications measure how well agents adhere to internal policies and procedures, surveying applications are necessary to determine if customers are satisfied with the call center's processes. A strong QA program employs both quality assurance and surveying applications to allow management to rapidly identify and resolve customer concerns and agent performance issues. Here is a checklist for building and deploying an effective QA program for at-home agents:

-  Select a web-based QA/Recording application that has remote call and screen monitoring capabilities. It should include the ability to live monitor agents, record, retrieve and replay calls, and create/review/respond to evaluations via the desktop. (Some solutions include the ability to rapidly identify high value calls.) The application should also support centralized call storage, and secure retrieval and replay.
-  Define the number and frequency of quality monitoring sessions for remote agent evaluations. (This number should be higher than for premise-based agents.) Communicate this information to remote agents so that they know what to expect. Provide scheduled feedback to agents about their performance, covering both strengths and improvement opportunities. Involve remote agents in all quality monitoring and training-related activities.
-  Document all transaction handling and departmental procedures, policies and guidelines. (This can be done via an online procedure system, knowledge management application, or on paper.) Be sure to address any

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additional requirements for at-home agents. Standardized procedures are essential for supporting training and for setting realistic agent expectations. Once the procedures are documented, create QA guidelines that reflect how each call/email type will be evaluated. Communicate these requirements to at-home agents via eLearning and coaching sessions.

- Include remote agents in QA calibration sessions to ensure that they understand the quality monitoring evaluation criteria and how they are being applied.
- Ensure that remote agents have access to their performance management reports and QA evaluations so that they can modify their activities, as needed.
- Use real-time performance management dashboards to tie at-home agents into the daily activity of the call center and to allow them to see how they are doing relative to peers and goals. Keep in mind that many at-home agents are highly motivated and competitive individuals who want to be outstanding performers.

### Security

Data security is a growing concern for all call centers, as companies must protect themselves from internal and external threats. At-home agents present companies with additional concerns, because controls and policies that minimize security risks at premise-based call centers (e.g., not allowing agents access to pen and paper to prevent them from sharing confidential data) do not apply. Therefore, companies must create an environment of oversight and frequently audit at-home agent activities and financial transactions. A growing number of companies are using unplanned site visits, as well. While this is not ideal, as long as agents know about this policy in advance (which is part of the strategy for reducing risk), it is acceptable. Security measures are necessary and agents must accept the need for them.

Another effective method for reducing security risks is to record 100% of agent calls and screens. Once agents are aware that they are constantly being monitored, they will be less likely to act inappropriately. Functionally rich workforce optimization suites include remote quality assurance and recording capabilities for both agents and supervisors. This allows a remote supervisor to live-monitor or review calls for any agent in a virtual call center, regardless of their location. The recording solution must encrypt calls and screens before they are passed from the agent's desktop through the Internet to the company's central storage facility. When appropriate, the recording solution must be able to mask customer credit card data to comply with payment card industry (PCI) standards. For relevant verticals, recording solutions must also comply with regulations like the Health Insurance Portability and Accountability Act (HIPAA) and Medicare Improvements for Patients & Providers Act (MIPPA) of 2008.

Coaching applications that allow supervisors to live-monitor and interact in real time with their agents or other management staff via "whisper chat," IM or chat also help to

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improve security. It's ideal if these solutions include a break-in capability so that agents are aware that supervisors can join their calls at any time.

### **Conclusion**

At-home agent programs represent a viable and practical remedy to some of the most pressing issues that confront call center managers – cost containment, exhaustion of local labor pools, inability to attract and retain qualified and skilled agents, and flexible scheduling requirements. The current generation of workforce optimization suites includes capabilities that help address many of the management challenges created by a remote work force. Workforce optimization solutions can reliably record, monitor, train, coach, support and enhance the skills of at-home agents. Employing at-home agents has helped call center managers achieve many of their goals, but only when the necessary tools and best practices are used to effectively manage the performance of this flexible resource.

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### ***About VPI***

VPI (Voice Print International, Inc.) is the premier provider of integrated interaction recording and workforce optimization solutions for enterprises, small- to medium-size businesses, trading floors, government agencies, and first responders. Through its award-winning suite of solutions, VPI empowers organizations to proactively improve the customer experience, increase workforce performance, ensure compliance, and align tactical and strategic objectives across the enterprise. With the power to be proactive, organizations are equipped to actively identify and maximize opportunities and minimize risk. For more than a decade, VPI has been providing proven technology and superior service to more than 1,000 customers in over 35 countries. For more information, visit <http://www.VPI-corp.com>.

### ***About the Author***

Donna Fluss is the founder and president of DMG Consulting LLC, the leading provider of call center and analytics research, market analysis and consulting. She is the author of *The Real-Time Contact Center*, *the 2008 Contact Center Executive and Management Briefing*, and many other leading industry reports on contact center hosting, speech analytics, performance management, workforce management, surveying and analytics, and quality management/liability recording. Contact Donna at [donna.fluss@dmgconsult.com](mailto:donna.fluss@dmgconsult.com).