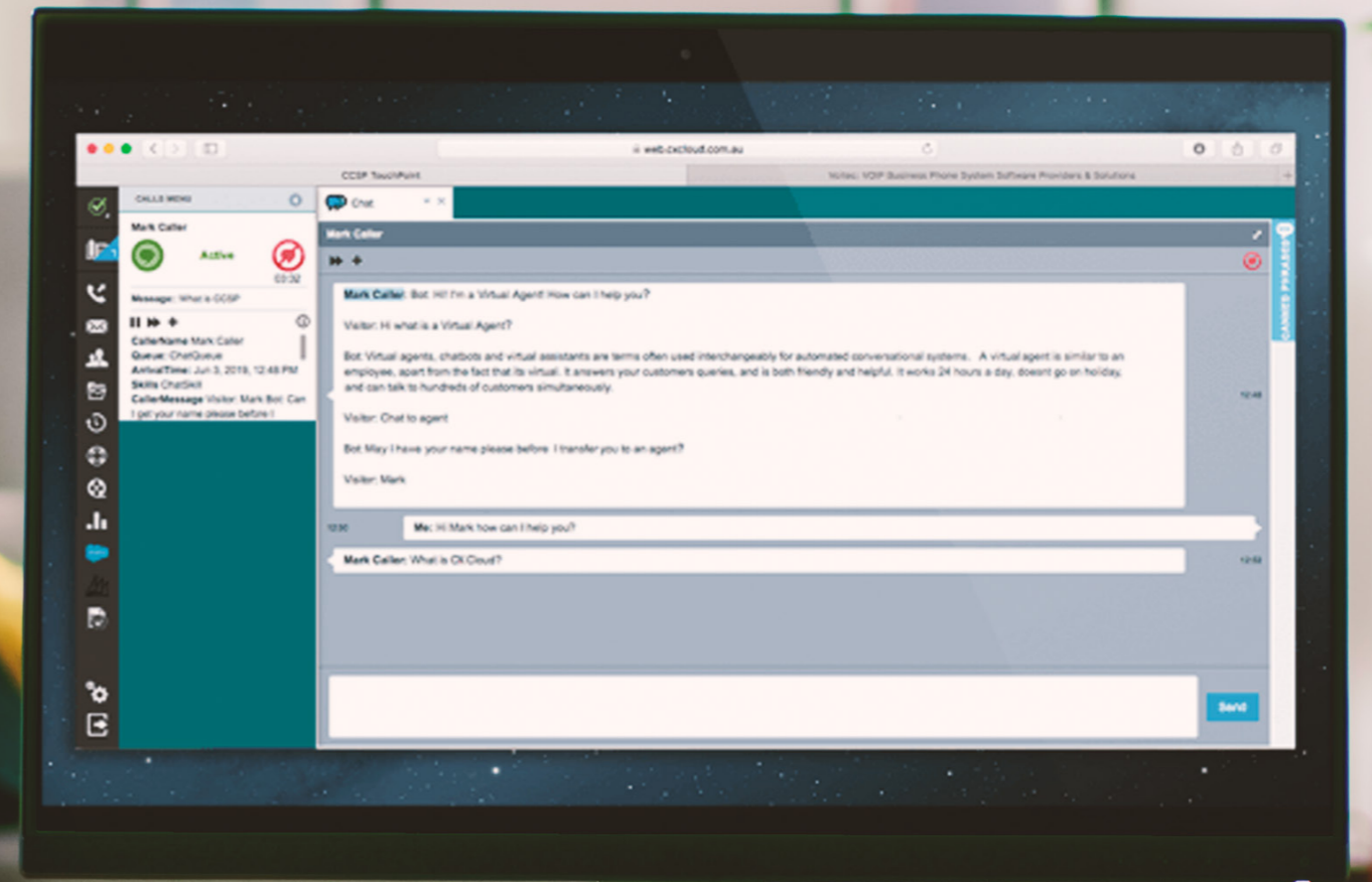




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Checklist for Remote Working for the Contact Centre

V1.0 | 2020



Introduction

When keeping your business operational is critical, preparing a disaster plan in case of emergency gives you a significant advantage over others who can only be reactive.

Recent events have taught us that reviewing, detailing and rehearsing all the necessary elements for a remote contact centre operation will give us a headstart on a smooth transition to the desired result, providing the business continuity we need.

This checklist aims to cover as many as possible of the most important considerations you need to plan for.



Computer and Security

- For planned remote working, ideally you will have company-issue hardware that's specially selected for remote use by your IT department.
- If you wish to anticipate this need, staff should be issued with laptops which they are required to take home at least at weekends – however that also opens up the risk that they get left behind on a Monday!
- Access on company-issue remote computers may be locked down so that personal use is restricted.
- Worst case, for emergencies or where company hardware is not used, you will need to identify the equipment (BYOD) that your team has available remotely and supply this information to the IT team, who can then advise what they can/will support, as it will vary for each remote user. However a critical consideration here is data privacy, so these decisions must be made in consultation with HR and Legal.
- Ensure machines are protected against virus attacks. The business should be prepared to fund staff to download approved antivirus software to home computers if necessary.

Peripheral Equipment



Headset

Ensure agents have a second headset at home or carry theirs home at weekends. Agents representing the business need to sound professional, so a good quality headset with microphone is essential. Require agents to perform a team sound check before going live.



Second screen (if required)

Some managers or supervisors, and even agents, operate as standard with a second screen, depending on their workflow and applications. You need to decide if this can be supplied or deemed non-essential when remote working is required.





Access to Software Apps: Cloud or VPN

- Application access is the make-or-break for remote working.
- To be prepared for a remote working contingency, you will either need to serve your business applications – including your contact centre solution and agent applications – via the Cloud, or via a virtual private network (VPN) that remote workers can connect to.
- Ensure you have a resilient policy and communication/escalation process for logging into company software.



Internet and Connectivity

A huge dependency for remote working is the quality of the network available to remote workers. Considerations include physical location, provider, data plan, data cap and shared access. Workers need to understand that high usage from sharing users at the location will impact their connection. The quality of Wi-Fi and the type of router can also affect delivery. Test early but also arrange for IT technical assistance to be accessible for the contact centre team as a priority.



Home Office

Agents Need

- A comfortable desk and chair.
- A professional-looking environment if video is to be used, within reason.
- A sound-proof environment.
- Minimal distraction (eg., from others sharing the environment, external interruptions, etc).

Tools to Consider for Remote Workers



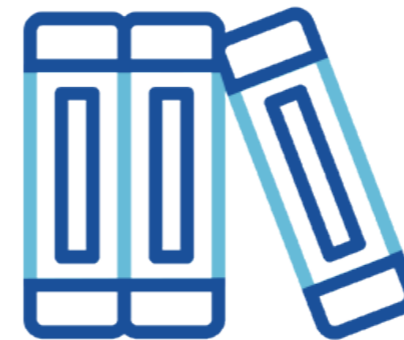
Video and Collaboration

If your business uses video collaboration software, such as Microsoft Teams or Vidyo, it may not have been available to the contact centre team, which tends to have its own team focus. We strongly recommend opening this up to the contact centre to help staff maintain their team ethos. Always encourage use of video for internal dialogues.



Dashboard

If your team is already used to watching activity and performance on the big screen in the office, this may be critical. Even if they are not, team visibility is a great team builder, and can be an essential part of removing some of the barriers of isolation brought by remote working.



Knowledge-base

Internal communication suffers when you no longer have conversations around the water cooler or coffee machine. An internal knowledge-base can fill that gap, allowing managers to post current, relevant information that can be accessed by everyone, keeping teams up-to-date with essential items but also providing a platform for engagement.



Call Monitoring

Organisations are always concerned at the potential for remote workers to be less diligent. This is where a quality management tool helps. Monitor silently to maintain your high standards – or let the team know you're always there, keeping an eye on the quality of customer interactions.

Tools for When the Pressure is On



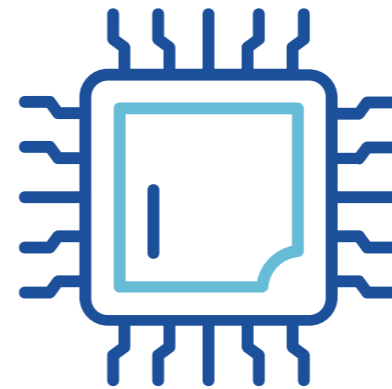
Callback (Virtual Hold)

Deploy Callback to take messages during peak times, eliminating wait time for callers who leave a message to have their call returned. Messages are delivered to agents in place of the call, and managers can consider configuring these for distribution at a less busy period, reducing wait time for calls at busy times, and taking the stress off agents *and* your service level.



Multi-channel options

Offering alternatives to voice, such as email and chat, can also reduce the wait time for voice callers. Ideally these channels should come with “canned” responses that can be administered centrally and shared across the team to make responses both efficient and consistent. The text “hold” announcements (eg., “Thank you for contacting us; an agent will be with you shortly”) can also be used to answer FAQs.



AI Assistance

Consider implementing a chat bot to respond to the most basic (and tedious) of enquiries 24x7, taking the load off agents and providing a faster response to customers and a better customer experience. Again, your central database of responses that would be used to power the bot would ensure that all information provided to your customers is current, consistent and accurate.



Auto Attendant / IVR

Reduce the load on your team and give callers critical information faster by fronting your contact centre with an automated greeting. This can provide immediate, current key information as well as directing callers to your website for further assistance.



Customer Experience Adjustments

Consider how you can subtly adjust the experience you offer your customers with minimum upset.

1. **Set expectations** – Post updates on your website to reset customer expectations on wait time. Add automated “position-in-queue” or estimated wait time announcements to your hold sequence, letting people know where they stand.
2. **Block when busy** – If appropriate, configure callers to receive busy tone when volumes reach a certain level, especially on free-phone lines, forcing them to hang up and try later. This reduces wait times but should be used with care.
3. **Service level** – consider adjusting this down to remove some pressure from agents at an extraordinarily stressful time.
4. **Update voice and text announcements** to include critical information and answers to FAQs, and filter out some calls.





Supervisor/Management Adjustments

There are also some adjustments that Managers can make, to ensure a consistent standard of service from the contact centre team:

1. Reconsider use of non-critical wrap-up and after-call worktime.
2. Now that you can't walk around your team to assist them, consider ramping up some of your supervisor checks, in real-time or via reporting. Use call recording or monitoring to follow up as needed:
 - Time on break and in-work
 - Time on calls (short or long)
 - Time on hold (often overlooked, and sometimes abused)
 - Time between calls
3. Review and update your Escalation Process for a remote environment as necessary – can your agents flag you for assistance onscreen since they can't put their hand up and wave?





Tips for Remote Working

These are some suggestions to help the team adjust to remote working:

- Dress up for work – just as if you were going into the office. This helps “get in the zone” for work.
- Keep a routine. Encourage staff to adhere to business hours and not let work creep into their personal lives (or the other way round!).
- Hold **video** meetings to keep the team engaged. Try and have more team or mini-meetings with different members.
- Anticipate and discuss potential challenges for work-from-home (kids, pets, environment etc) and then review regularly.



Planning Recommendations

- **DON'T WAIT FOR AN EMERGENCY!** The hard and fast rule for disaster survivability and resilience is **BE PREPARED**.
- **REHEARSE!** We hear a lot about the benefits of working from home, but a benefit not often considered until COVID-19 is **Business Continuity Planning**. Having all staff work at home regularly (say, one day a month or ideally, one day a week) lets you identify and resolve all remote working issues and be well prepared for emergencies. Your entire contact centre team, including managers, will already have all the tools they need, and be familiar and confident with the routine.
- **Aim for the ability to swap to a work-from-home operation in just hours and resume business as usual.**



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