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REMOTE CONTROL

Best Practices in Implementing a
Work-at-Home Contact Center
Solution

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Introduction

In the midst of a national or global epidemic, how can your customer experience, and as an extension, your brand, survive?

This question has been brought front of mind in the current coronavirus pandemic. The answer, logistically, is found in social distancing according to the World Health Organization (WHO) and numerous other government and healthcare organizations around the world. These same organizations have also encouraged businesses to review their current pandemic flu plans or develop new plans, particularly ones that incorporate remote work policies.

Nimble, larger corporations such as Amazon, Google, Facebook, and Microsoft have directed a portion of their employees to work from home as of early March 2020. With flexible teleworking policies already in place, many employees can be moved to home-based arrangements with reasonable ease. For brick and mortar contact centers, however, remote work can be a significantly more complicated effort. The coronavirus pandemic has many organizations identifying enormous risk to their physical contact center locations; and customer experience (CX) leaders are left scrambling, trying to find a way to transition these operations to a virtual environment. Overworked and overwhelmed in their efforts, they need additional guidance and best practices to ensure success.

For more than 25 years Arise Virtual Solutions has been leveraging cloud-based technologies to unite work-at-home customer care contractors (or, as we call them, **Service Partners**) with some of the world's most notable brands, to deliver top-notch customer support - experience that positions us as true pioneers in this industry. While organizations scramble to deploy what resources they can to an at-home solution, some **question if it's too late. It's not, but guidance is needed to optimize the transition and smooth any potential areas of risk.** As tried, tested, and true experts in this domain, Arise is pleased to share best practices around finding the right resources, virtual learning, flexible scheduling, quality performance, communications and remote engagement, as well as technology and security to help organizations as they transition their bricks and mortar contact centers to remote environments.

Work-At- Home: Two Main Options

There are a two main "styles" of at-home delivery and organizations are sometimes challenged to determine which is the right one for them.

Hub and Spoke Solution

Within a hub and spoke solution, agents are effectively tied to a specific location, however, deliver services from home. Activities such as hiring, learning, meetings, and some or all quality assurance take place within a physical center, whenever possible. Within this solution, key support functionality (IT, workforce management [WFM], human resources, etc.) are often retained on site and operational nuances of a traditional center are virtualized. It's an attempt at "business as usual" with calls being delivered to agents' homes rather than their site-based workstations.

The idea of "sending agents home" in response to coronavirus or other unforeseen activity would likely be an execution of a hub and spoke solution. This also accommodates site

capacity issues nicely, allowing a subset of agents to work from home when there simply isn't space to house them any longer. Advantages to the style are a continuation of an existing contact center, retaining of talent currently delivering services, and an enhanced level of agent engagement and cultural instilment, which is a significant concern for organizations that are looking for true brand champions. This solution, however, limits the flexibility and adaptability to , operational standards (i.e. shift structuring/scheduling) as it really is focused on keeping things "normal". It also doesn't completely reduce localized disaster risk. Social distancing may be an effective measure to address the coronavirus impact to a brand's CX delivery, however, the next crisis could be a natural disaster that severely impacts the site (or "spokes" area), resulting in significant service interruption.

Virtual CX Solution

Within a truly virtual solution, there is no site for agents to be tied to or associated with. Theoretically there are no boundaries as to where the services are delivered. In practice, it is usually restricted to domestic delivery, which still provides a dramatically larger resource pool to draw from, as needed.

Virtualized support and administrative functions allow for a true departure from a traditional bricks and mortar solution and the introduction of policies, tools, and best practices that support a more flexible WFM effort than traditional four to eight-hour shifts can bring tremendous value. Natural business continuity and disaster recovery exist as the workforce can be physically disparate. Challenges to this delivery include increased complexities in technology and operational practices, and perceived lack of cultural absorption and workforce engagement.

Logistics Management

Transitioning or implementing at-home remote workforce can be challenging within any functional area, however the logistics around moving a contact center is significantly more so. There are technical and physical considerations that need to be respected to ensure the customer experience is not negatively impacted. Technical considerations are covered later in this document, however the first basic question an organization should ask is "is there a suitable work environment available?".

Emergency protocols around coronavirus have pushed many corporate employees to work from home under less than ideal situations. In these unusual circumstances, most realize that crying children or dogs barking are generally minor inconveniences during an intra-team conference call and less than ideal situation for optimal productivity for the employee, but manageable. When work is self-guided, individuals can balance priorities and ensure duties are done, maybe not during their traditional hours.

Most contact center workers lack the same luxuries. Frequent interruptions, or persistent background noise during a call, is a significant detractor from the customer experience. Even chat and other non-voice communications are best handled in a closed space away from children, pets, sirens and other distractions that ultimately impact timely, focused responses.

For a contact center agent to work from home, they ideally have a closed off workspace large enough to comfortably house a desk with their equipment. This space should have reliable wired internet connectivity. A hard-wired telephone may also be required depending on the telephony solution deployed. The workspace should be removed from background noise and distractions which could not only divert attention from the customer, but also degrade the quality of the call.

These stipulations can be significant barriers for large families, shared accommodations, unreliable or shared infrastructure and are, a major detractor from at-home deployments gaining traction in the offshore space. Simply sending people home isn't sufficient if their homes are not conducive to the experience your customers deserve. Organizations that use the Arise Platform have access to a network of pre-screened Service Partners who have already set themselves up at-home and are looking to support customers from their favorite brands.

Getting the Right Resources

The reality is that attrition in the average brick and mortar facility tops 45%, and the cost to replace a single agent can be 20% of a full annual salary¹, meaning that sourcing for a virtual environment is critical to healthy at-at-home program development. While current thoughts may be directed at potentially mobilizing existing operations to a virtual environment, if you're starting a program fresh, the right sourcing strategy is also, of course, critical.

Not every individual is well suited, or even wants, to work from home on a permanent basis. Some need the structure, and direct supervision, while others crave the office environment and thrive in social settings. The trick to sourcing effective at-home resources lies in profiling individuals with the desire and the abilities to flourish in a remote setting. The easiest way to accomplish this is through psychometric profiling. Using the profiles of high performing, successful at-home individuals, built on a series of relevant questions that gauge personality strengths and weaknesses, organizations can easily pre-screen candidates to determine potential best fits.

From experience, Arise has found that entrepreneurial individuals fair far better in at-home situations. Accustomed to being their own boss, these individuals have a high level of self-management, are generally more mature and responsible, and are often accustomed to individual work efforts, reducing their need for the traditional office. Often tech savvy and effective communicators, entrepreneurs can adapt quickly to the chat, scheduling, and other management tools and portals that at-home operations rely heavily on.

One bonus element that the Arise Platform offers is the opportunity for entrepreneurs to choose the brands they support. Opting for brands they know, and love, ensures higher levels of engagement and performance for clients using the platform.

Virtual Learning

Finding the right agents to support customers in an at-home environment is only half the battle. Just like a physical contact center, agents in a virtual environment need access to proper learning and upskilling to ensure they are empowered with the right knowledge, skills, competencies and tools to deliver legendary customer experiences. Learning can present unique challenges to a company deploying an at-home solution for the first time.

Organizations choosing to operate in a “Hub and Spoke” solution can, as long as social conditions allow, operate “business as usual” for information transfer. Bringing agents into the hub site to participate in traditional learning sessions is typically straightforward and comfortable, and one reason this solution retains popularity. This solution works especially well when the “spokes,” or agents, remain in reasonable proximity to the site, allowing for daily commutes for initial and ongoing learning requirements. Should this commute become unmanageable, this solution can become increasingly expensive, requiring days if not weeks of travel related expenses. Far from ideal.

As smart organizations adapt to take advantage of a truly virtual at-home solution, their strategies for information transfer should also adapt. As agents become truly untethered to a physical site, virtualized learning is a key element in readying them for production. Virtual learning (or eLearning) is a form of learning that utilizes electronic/digital technology and networks for delivery, interaction, facilitation, demonstration or evaluation of instructions and learning material. It can be imparted and delivered individually or in a group, but generally, it has a reach over a wide physical or geographical distance – helping to extend who can support your customers by teaching those who are too far or unable to attend in-class sessions. Truly effective virtual learning encompasses the following:

- *Instructors well-versed in virtual learning.* Just as not all agents are suited to at-home work, not all instructors are suited to instruct virtually. Instructors with a background and/or experience within this unique form of facilitation are a key to success.
- *Proven and varied fundamental adult learning strategies.* A balance of instructor-led and self-directed learning presented through a variety of audio, visual, and kinesthetic media helps maximize engagement and appeals to all types of learners.
- *Deployment of effective tools to maximize learner engagement.* Virtual environments that support focused learning and break-out sessions, that encourage learner participation and allow instructors control over engagement all help increase learning and retention rates in the students.
- *Performance based goals and outcome tracking.* Even more critical than in traditional classroom learning, virtual learning should clearly articulate goals and continually tie back skills to goals to ensure success. Getting and keeping everyone on the same page can be trickier so reinforcement is crucial and aggressive outcome tracking helps ensure learners remain on track.

Virtual learning is a critical element of the Arise Platform, whereas Arise has not only hosted tens of thousands of virtual learning classes over time, we have also supported numerous clients in designing and delivering their own virtualized learning programs. Learn more about virtual learning and how Arise can support this function here:

<https://www.arise.com/resources/white-papers/adult-virtual-learning-contact-center>

Flexible Scheduling

The plethora of advantages of remote work to the individual are clearly outlined in countless sources across the Internet: less commute, better work/life balance, less expenses (gas, lunch, even work attire), and an overall enhanced sense of empowerment. However, as most organizations fear, there is whole new world of distractions just waiting in a home-based office that can create time management nightmares for companies and workers who are ill-prepared.

Arise found a successful way to combat time management issues, which is at the heart of our radical flexibility, by making it possible for agents to choose their own service time in half-hour increments and intervals that suit their lifestyles. Tying this schedule selection to KPIs and metric obtainment helps us support performance, ensuring that agents not only have opportunity to choose preferred service time, but that they are incentivized with top performance to ensure they have first choice at these times.

The true magic in this solution, and the reason that the Arise solution is game-changing in the contact center space, is the ability to offer service time to agents *on demand*. Meaning that agents who are not already scheduled can (and do) pick up extra half hour intervals to meet an unexpected peak in call volumes.

Matching supply to demand is a fundamental benefit of the Arise Platform, not easily found within an inflexible brick and mortar center, where four to eight-hour shifts are the norm. However, delivering effective, on-demand coverage by half hour interval at-home is not for the novice implementor in the space. Highly dynamic WFM and time management intelligence comes into play with Arise's proprietary, award-winning Starmatic® Scheduling System which aligns client demand with resource availability to create this radical flexibility.

Not sure how this translates into your current customer experience delivery? Arise is here to help. Read more about our flexibility or find out how you can enlist Arise to help increase your CX responsiveness today at www.arise.com

Quality Assurance

There are two things to keep in mind if quality assurance is holding your organization back from delivering remote contact center services.

First to understand is that quality support does not have to vanish when an agent is removed from a bricks and mortar center. Though they may be physically isolated from direct supervision, they are far from unsupported. With the right technology in place (e.g. chat rooms, virtual platforms), agents are, easily able to “raise their hand” and request assistance in a way that is unobtrusive to the live call. Not only are they able to engage in escalations support, they can also engage in peer-to-peer support, just as they might ask a neighbor for quick guidance in a brick and mortar site. Again, with minimal to no impact to the call. The support agents can receive without the customer even being aware can be much more significant than in a traditional site where customers are put on hold for side conversations. Raising one's hand has never been easier.

Similarly, one-on-one quality and performance development sessions can easily be held virtually, either through chat or on voice or even video calls with the assessor. Finding the type of sessions that work best for different scenarios and individuals allow for a further level

of personalization to the session to enhance the impact and drive stronger performance. Also, stronger ties between performance and an agent's scheduled service time, (discussed above) can further drive the results organizations want naturally.

Second and more fundamentally, is trust. As noted by Gartner's Distinguished VP Analyst, Carol Rozwell, mutual trust is at the heart of successful remote work initiatives in the digital workplace. Application leaders must trust that [agents] will act responsibly when working remotely. [Agents] must trust that [organizations] will act in their best interest and enable them to be successful².

If you've reached this far, you've engaged the best possible agent for the role - ones who can be trusted implicitly. These agents have participated in learning that is equally, if not more engaging, than traditional classroom sessions and have passed assessments that demonstrates their readiness to deliver services. A solid support structure that mirrors, or even improves on traditional efforts is in place and agents receive peer-to-peer or escalated support at any stage in the call, more seamlessly than ever before. These agents are as ready and qualified as they can be to deliver truly legendary customer service to your customers.

Still not completely confident? Arise has done this for over 25 years and we'd be more than willing to help.

Robust Communications

Contact centers are data and information driven and communication strategies are critical in effective operations. Agents spend most of their time when not on calls, processing and managing information. Keeping them informed about program details, metrics, operational notices, any cross-skilling/up-skilling requirements or other pertinent information is key to ensuring all are informed and working towards the common program goals. Traditionally information is shared through team huddles, agent portals, emails, wallboards and the like.

Deploying an at-home solution requires an enhanced focus on the information that needs to be disseminated. Clear effective communication provided in manageable formats, appropriate for agent interpretation, is critical. Some elements should not change (emails, dashboards and broadcast messages/ communications), while some, obviously, must. Wallboards can be built into portals and key data pushed to agents on demand and learning opportunities are handled through virtual learning tools discussed previously. Knowledge management systems may also be leveraged, giving agents opportunity to peruse important pieces of information at will.

Perhaps the most invaluable tool for remote agents is chat. In a recent survey study, nearly all respondents (98 percent) experienced some kind of benefit from instant message and chat technology³. Both individual and group chat rooms help agents remain informed and engaged with their peers and facilitators. Many organizations with remote workers add voice and video to their chat when appropriate or needed. Investment in a platform that supports these functions for remote agents is truly money well spent.

Online group information sessions may also take the place of traditional face-to-face group meetings. And remember, just as some group meetings in traditional centers are light and

fun, online information sessions can be equally so. Set aside time to have engaging, fun activities that can be done remotely. Share information in interesting ways, get creative and build the brand and the morale of the agents supporting it.

Responsive Technology

Building a responsive technology infrastructure that works takes a lot of consideration. CX leaders are rarely technology experts, so don't leave your IT Team out of the process. Make sure they are part of the planning and that they have a solid roadmap. Because this roadmap can vary significantly based on an organization's current infrastructure and requirements and expectations, here's a list of things to determine to ensure a smooth transition and seamless CX delivery in an at-home environment.

Cloud-based technology is the key to success with remote work programs. According to some, if you haven't invested in cloud computing by 2020, like those companies that didn't embrace the internet back in 2000, you've already fallen behind your competition. Cloud computing increases safety and gives users access to a remote virtual work environment⁴.

Think about current business operations and the technology that support them. From telephony to computer systems, it's important to make sure reliable connections allow for seamless support. To accomplish this, you'll either have to have a secure VPN-like connection or operate in the cloud. You may need to upgrade or change telephony partners if your existing infrastructure cannot adapt.

Next, think about what's on a computer. Depending on the business, it's product/service offerings, and the support services provided, ongoing access may need to be provided to specific software, support tools, databases, or knowledge management systems.

Connectivity is yet another variable. Unless your budget includes individual home network installations, you will be reliant on individual agents' service Internet service plans and network setups. A "Tech Check" to validate bandwidth and network quality of service (QoS) should be mandatory on each home network before deployment. Next you will need to determine how agents will connect. Will there be need for an encrypted VPN, dedicated firewall, or perhaps special authentication at log-in? This is highly dependent on the individual program requirements and the infrastructure agents will connect to and use.

Next, consider technology that helps ensure seamless delivery such as quality, scheduling, and performance management. Learning and communications tools are also going to be important. All tools must be easily transitioned to a virtual or cloud-based environment to be effective for at-home service delivery.

Finally, how are day-to-day operations going to be facilitated? How will CX leaders ensure their operations are supported and performance metrics are being met? Supporting elements are truly critical to the success of your remote operations and worth determining early on to ensure your technology and your desired operational processes complement one another.

24/7/365 Security

Fraud is costing businesses and individuals across the world \$5.127 trillion US each year and it is estimated that, were organizations to correctly measure, manage and introduce procedures to reduce fraud, potential savings of up to US\$2 trillion could be saved annually⁵.

Privacy is now increasingly recognized as a fundamental human right worldwide. In 2016, the European Union (EU) set the stage with the General Data Protection Regulation (GDPR), a regulation in EU law on data protection and privacy for all individuals within the European Union (EU) and the European Economic Area (EEA). The state of California quickly followed suit with the California Consumer Privacy Act (CCPA), a bill that enhances privacy rights and consumer protection for state residents. As additional privacy laws come into play, organizations must quickly establish trust, demonstrating that they are doing the right thing with personal information and establish customer trust to close deals and drive revenue.

It's critical to fully understand data security and accessibility. With remote workers, security becomes of greater importance. Retailers and other organizations collecting either personally sensitive or financial information will need to consider how the data is secured, both through technology and process. Your PCI or other compliance may not extend to an at-home solution and accommodations in technology and processes may be needed to continue to support the CX. Using technology that allows customers to self-input credit card or other personal information, masked from agents, is one way to adhere to PCI standards within a home environment.

It is imperative that organizations consider advanced security technology in everyday business practices and customer support efforts. To begin, computer checks should be done to ensure agents have the right equipment that match work environment policies. Next, it is recommended that agents connect via encrypted virtual private network (VPN) to a dedicated firewall and VPN appliance, assured by means of endpoint auditing at every connection.

Organizations should plan on using next-generation redundant systems collocated at highly secure and highly available Tier IV data centers. Infrastructure for each project should be separated into dedicated, segregated "pods" to further ensure data security and integrity. Administrative access should only be made possible with two-factor authentication, and all access must be logged and monitored by a "24/7 eyes on event" security operations center.

The Arise Platform takes care to implement all of these measures and more. Client data is always retained on client systems accessed only by thin client provided by either Arise or the client. Final access decisions are controlled by the client and connection to client systems is by secure or private channel. If call recordings and screen capture are required, they are encrypted throughout the lifecycle with data-masking capabilities available to remove sensitive data during recording. Playback is secure and controlled by the client. Arise encrypts all connections via SSL based VPN.

Upon request, Arise can implement the Arise Secure Desktop (ASD) tool, a proprietary, thin client solution providing a physical barrier between client sensitive data and Service

Partners. The solution provides an environment free of malware, spyware and keyloggers. It also restricts all non-critical functions such as saving, printing, scanning and access to external media.

Arise is Level 1 PCI certified annually and undergoes a SSAE18 SOC1 Type II audit by Grant Thornton.

In Summary

Research tells us that the ability to work-at-home increases worker productivity (a Stanford study has showed that call center employees increased their productivity by 13% when allowed to work from home), reduces attrition (employees who are given the option to telecommute are reportedly much happier (73%) with their employers than traditional office workers (64%)), boosts morale (a study from Pennsylvania State University shows that telecommuters are generally less stressed and happier than those who work in an office), and is cost-effective (it's estimated that for each employee who telecommutes, a company saves about \$11,000 annually)⁶.

However, sending contact center agents to work from home is not quite as cut and dry as it is to virtualize the finance or human resources team. Extensive people, process and technology considerations are needed to effectively transition and deliver remote contact center services. Overwhelmed by all that's involved in virtualizing your contact center? You are not alone. Very few have cracked the code to a truly seamless, successful at-home CX, including some of the bigger players in the BPO industry. Work with Arise to help realize your at-home CX vision today.

About Arise Virtual Solutions Inc.

Arise Virtual Solutions has created a disruptive technology platform that connects the world's biggest brands with a previously untapped network of small business owners and their agents. This entrepreneurial network of work-from-home service partners creates exceptional customer experiences that increase sales, improve loyalty and speed customer growth. The Arise® Platform enables brands to transform the relationship between their company and their customers through state-of-the-art security, access to brand advocates and on-demand flexible capacity to handle sudden or seasonal volume changes.

To learn more about Arise Virtual Solutions, please visit <http://www.arise.com> or email us at info@arise.com.

The Arise® Platform is the future of customer care.

¹ [High Turnover is Costing Call Centers: Why Employee Retention Should be a Priority and What to do About it](#), CRM Gamified, February 26, 2019

² Rozwell, Carol, [How to Cultivate Effective 'Remote Work' Programs](#), Gartner, May 14, 2019.

³ Harris, Daniel, [Boost Productivity With Online Chat Presence Displays](#), SoftwareAdvice.com, September 21, 2015

⁴ Corliss, Rebecca, [Best Technology for Working Remotely: 6 Remote Working Tech Tools](#), OwlLabs.com, January 14, 2020

⁵ [Fraud costs the global economy over US\\$5 trillion](#), Crowe.com, July 12, 2019

⁶ <https://www.socialtalent.com/blog/recruitment/5-essential-qualities-to-look-for-in-a-remote-worker>