

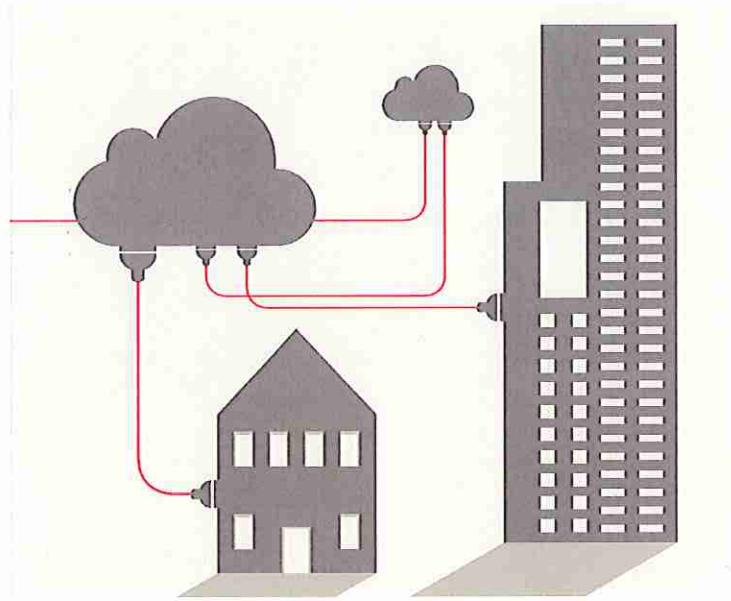
Home-Agent Best Practices

Four contact centers share home-agent **best practices, tips and lessons learned.**

BY SUSAN HASH

Work-at-home programs have come a long way in the past decade. Business continuity planning, enabling technology, the need to retain skilled workers, work-life balance demands—those are just some of the drivers contributing to homeworking's development and growth.

As contact center work-at-home programs mature and demonstrate solid results in higher staff productivity and retention, more companies are testing the home-based waters, while programs that have been operating effectively for a few years are looking to expand. Industry research has shown that the use of home-based agent programs is increasing worldwide, although U.S.-based con-



tact centers based are reporting the highest usage—37% currently have some type of home-agent program in place, with the median proportion of agents working from home around 10%, according to ContactBabel's 2011 *U.S. Contact Center Decision-Maker's*

Guide.

Initial obstacles to home-agent programs concerning technology, data security and the ability to supervise remote staff have been largely resolved through the use of VoIP, cloud-based solutions and leaders → [page 3](#)

NOT YOUR MOTHER'S IVR

Those of us who make our living in and around contact centers know that sinking feeling when someone asks you what you do. You offer up your proudest spin on service excellence, and then brace yourself for the "horror story" about their recent customer interaction or the diatribe



Lori Bocklund

about "those darn systems" real people too often hide behind. Without fail, an interactive voice response system (IVR) is the culprit at the center of this denunciation. You try not to take it personally, and proceed to defend the broader industry as well as your own center and company. → [page 26](#)

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Better Call-Routing Design

First impressions are lasting ones. We coach our agents to provide a warm, friendly greeting for just that reason. In today's contact center, though, that first



Jay Minnucci

impression is cast long before the agent comes on the line. Automated greetings, menu options and routing configurations combine to provide the customer with that all-important initial reaction to our service commitment. While the industry as a whole has not earned the highest marks in this category,

by implementing a few improvements we can change that perception in a hurry.

A Guiding Principle

Let's start by recognizing that designing easy-to-use, friendly and efficient call-routing plans is no easy task. In essence, the messages and menus that we present are the interface between humans and machines, and those two parties do not always play nice together. By recognizing the challenge this task imposes, we are more apt to → [page 18](#)

Home-Agent Best Practices

who are willing to test creative approaches to managing home-based agents. Not surprisingly, the ContactBabel study found that the centers reporting concerns about the ability to effectively manage home-agents were those that did not have programs in place, while centers with some experience of using homeworking were far more likely to be positive about remote management.

This month, we spoke with contact center leaders who have had home-agent programs in place for several years, and who dispelled the notion that home-based staff cannot be managed effectively. They shared with us some of the best practices that have emerged from their programs, their recommendations for success and a few lessons learned along the way.

Make Sure that Key Skills Are Accessible

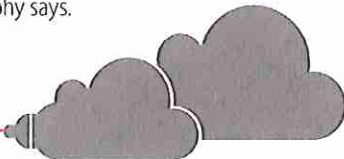
When management at the customer service center for the Employees Retirement System (ERS) of Texas decided to launch a home-based agent program almost four years ago, they started out as most centers do, by sending home their most senior reps—those with the longest tenure and the highest performance.

The ERS customer service center has 34 FTEs, of which 10 reps currently work at home. While the majority of their contacts are phone calls, the center also handles face-to-face interactions from walk-in visitors and scheduled appointments, says Scott Murphy, ERS' assistant director of customer benefits, and *Pipeline* editorial advisory board member. The center averages about 36 visitors a day. Naturally, in-person interactions take longer—the average time to retire a state employee in person is about an hour vs. 10 minutes over the phone.

Murphy and his management team quickly realized that, by sending home their most knowledgeable agents, they had, in effect, removed critical skill sets, such as the ability to retire state employees, from the onsite department.

"We didn't have that resource readily available here with us, which made a difference when dealing with complex issues, and we didn't have as many people available to support the retiring people who were walking in," he recalls.

The solution was an in-office rotation. Now home-based agents come into the office to work for one day every other week. "We rotate it so that we've always got somebody here with that skill set," Murphy says.



Encourage Face-to-Face Activities with Coworkers

Home-based staff often miss the social aspect of being in the workplace. Although ERS management realized that work-at-home staff might feel isolated at first, they didn't anticipate the high degree of loneliness that agents actually felt, says Murphy, adding that, "It was a big adjustment for them."

While the isolation of working at home can be a difficult transition, onsite staff also must adapt when a center launches a home-based program. Onsite agents often find it challenging to build and maintain effective coworker relationships with their home-based colleagues. A few years ago, a study by Rensselaer Polytechnic Institute found that, if this issue is not addressed, inhouse staff are apt to become less satisfied with their jobs and more likely to leave the company. However, the study pointed out that managers could help to mitigate some of the adverse impact by ensuring greater face-to-face contact among coworkers when home-based staff are in the office.

The ERS customer service center does this on a monthly basis by bringing the entire home-based staff onsite. "We make that a very special day within the contact center," says Murphy. "That's also when we announce any incentives, contests or special fun activities that we have going on so that they're a part of it."

Management at Fairmont Raffles Hotels International's Global Reservation Centre, based in New Brunswick, Canada, also encourage their home-based agents to come into the center and participate in social events throughout the year, says General Manager Allison Lang. The center has 210 reservation sales agents, of whom 65 are currently home-based.

In addition to planning onsite events to encourage face-to-face interaction between at-home agents and their onsite colleagues, management also holds regional social gatherings to allow the home-based agents to network and form relationships with their peers who live in the same community, says Lang. Colleagues from other departments that the home-based staff regularly interact with, such as IT, customer service leaders and center executives, also often attend the regional social gatherings.

Management at the Trademark Assistance Center (TAC) at the U.S. Patent and Trademark Office (USPTO) schedules quarterly socials to maintain a strong sense of community among its employees, says Supervisory Trademark Information Specialist Dora Best. The TAC has 23 agents, all of whom work at home three or four

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Dora Best, Supervisory Trademark Information Specialist, Trademark Assistance Center, U.S. Patent and Trademark Office, says quarterly socials helps to maintain a sense of community.

Over-reliance on systems and collaboration tools for supervisor-agent interaction is a key barrier to an effective home-agent program.



USPTO's Trademark Assistance Center (TAC) home-agents at a team huddle

Photo by Heather Wilson, Visual Information Specialist, U.S. Patent and Trademark Office, Office of Program Control

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days a week. Launched in April 2006, the home-agent program was awarded the 2008 Telework Exchange Award for Best New Telework Initiative, and has been modeled by other federal government agencies.

In addition to the quarterly functions, management holds "informational huddle sessions" every Tuesday when the entire team comes into the center. "Communication is key. When the employees are onsite, we make it a point to meet with them. We use a high-touch approach. We reach out to the employees to offer assistance and solicit their input, and we're constantly providing feedback," says Best.

"We try to leverage those occasions where we have the opportunity for face-to-face communication, such as staff meetings and the socials," says Shana Webster-Trotman, management and program analyst, USPTO. "We'll take the opportunity to combine a discussion about office policies and procedures with feedback to show the employees that we do value their input and their service."

Use Technology to Create a Connected Environment

Managers of successful home-agent programs agree that *constant* communication is the key to making it work. These days, there are a variety of tools that can help to improve real-time communication,

including wikis, intranets, instant messaging, SMS and chat.

"You have to communicate with work-at-home staff so much more than with the people who are onsite," says Murphy. "They miss out on so much because they're not in the environment. We ask our supervisors to reach out to those who work at home multiple times a day." For instance, in the center, information and updates about process or policy changes, or knowledge that needs to be communicated quickly can be sent via email or posted on a sign board. However, supervisors convey updates to work-at-home staff through phone conversations.

Another unique way that ERS helps its home-based agents maintain a connection to the center is through a live video camera that allows home-based staff to view what's happening on the floor in real time. They can access the feed via the center's intranet page. ERS management decided to install the live camera after a fire drill at the center. The home-based staff weren't aware that their onsite colleagues had left the building. The queue was climbing, but they didn't know why. When they tried to contact a supervisor through phone and instant messaging, there was no one available. Now they can check the video to see what's happening, Murphy says.

The agents—both onsite and at- → page 6



Shana Webster-Trotman, *Management and Program Analyst, USPTO*, recommends that managers reach out and make contact with home-based agents regularly.



A VIPdesk at-home agent

Don't try to create something that is new. Use what's already there, build upon it and make it successful for your environment.

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home—enjoy the visual connection. “When I walk through the center, I’ll see some of the reps on the floor waving at the camera, which tells me that they’re probably instant messaging with one of the work-at-home people who’s looking at them through the camera,” Murphy says.

At VIPdesk, a provider of concierge, customer care and loyalty programs, staying connected to its 1,000 home-based agents located nationwide requires robust tools. The center is 100% virtual and relies on an all-in-one contact center solution from Interactive Intelligence (Customer Interaction Center) to support its team. “We have a lot of interaction with our agents as they start to take calls,” says Addison Hatch, VP of Service Delivery. “There is a module [Interaction Supervisor] that allows our supervisors to see their entire team. They can go in, click on a team member and listen to a call. They can send notes to that team member while they’re on the call, and they can actually go in and take over the call. It’s very helpful if you’re feeling lost or need additional help.

“When I used to manage in a brick-and-mortar facility, people raised their hands for help. The great thing about this system is, the second a team member raises a flag, we can instantly go in and listen, see what’s going on and provide feedback. It gives them a higher comfort level knowing that there’s somebody

there supporting them.”

In addition to the contact center solution, VIPdesk has developed its own instant messaging application that can send blasts to the entire team for real-time updates. Another tool that is efficient for providing information is the VIPdesk University, a client-branded, web-based learning management system. It’s an important component of the new-hire training program (see the section, *Virtual Training: Test Frequently for Understanding*, later in this article). “It’s also where agents can access their statistics, see if there are any changes to the program, and find out if they need to access new materials that may have been updated—it will give them all of that information when they log in to start the day,” Hatch says. She adds that, “these types of tools can provide better communication of information out to the team than you would have, in many cases, with onsite staff in a brick-and-mortar center.”

Practical Pointer: Give home-based agents a way to get to know their fellow remote workers. Creating a Facebook group for home-based staff allows them to develop a sense of camaraderie with each other, says Fairmont Raffles Hotels International’s Louise Andrew, manager, workforce planning. “They can post pictures there so that they can put faces to names, and converse with each other just as you → page 8



Addison Hatch
VP of Service Delivery, VIPdesk



Allison Lang
General Manager, Fairmont Raffles
Hotels International



Louise Andrew
Manager, Workforce Planning,
Fairmont Raffles Hotels International

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would at the office," she says. "It's a tool that has been embraced within our home-based group."

Build Stronger Supervisor-Agent Relationships

Studies have demonstrated the value that the supervisor-agent relationship has on front-line performance and retention. But how can frontline supervisors continue to engage their team when individuals are not in the center? At the ERS customer service center, video, again, provides an effective solution. Whenever supervisors communicate with their work-at-home staff by phone, they are required to use the video conference feature, says Murphy, adding that: "It helps to create a stronger connection between the supervisor and the work-at-home person than a phone call or an instant message would."

Lang agrees that keeping home-based agents connected is one of the biggest challenges of work-at-home programs. In fact, they take a slightly different approach than most work-at-home programs. The Global Reservation Centre has two dedicated team leaders who manage and coach the home-based agents. Each month, the team leaders visit each of their team members to conduct their coaching sessions within the agent's home office. Most of the agents live within an hour to an hour-and-a-half's drive from the center, although if a team leader needs to stay overnight in a region, it helps that the hotel has properties located in the communities. However, during the winter months, when the weather can make driving conditions dangerous, the team leaders conduct their coaching over the phone.

Team leader visits are well-received by the home-based agents, says Andrew. "We didn't

know how that would go over initially," she says. "But they've been extremely welcoming—they love receiving a personal visit. We hear about people baking muffins because they know that their team leader is coming over."

Practical Pointer: Make contact with home-based agents regularly. "Don't assume that everything is OK because you haven't heard from an employee in awhile," says USPTO's Webster-Trotman. "Take the initiative to reach out on a consistent basis, even if it's just to ask, 'Is everything OK? Is there something I can help with?'"

Develop Techniques to Get Past Communication Barriers

Text-based communication tools, such as email, IM, web-based posts, are fine for sharing information, but they don't provide supervisors with much insight into their team's emotions and stress levels. In fact, over-reliance on systems and collaboration tools for supervisor-agent interaction is a key barrier to an effective home-agent program, says USPTO's Best.

"The absence of face-to-face interactions limits your ability to pick up visual cues," she points out. "In a contact center, stress factors can be detected by someone's facial expression. That is restricted in a virtual environment, so you have to use other resources to detect if someone's stress level is up or if they're handling a call that may require intervention."

To compensate for the lack of visual cues, VIPdesk trains its supervisors to use the "sandwich technique" when providing feedback; i.e., praise followed by corrective feedback followed by more praise. "When you don't have a person's facial expressions to use as an indicator, it's that much

more critical to emphasize the positive pieces of the conversation," Hatch says. "People sometimes react more negatively to feedback given over the phone than they would face to face." That's why it's also important to interact with home-based staff via phone more often, and not just when you need to deliver corrective feedback, she adds.

Practical Pointer: When providing instruction or feedback over the phone, asking agents to paraphrase the information will allow supervisors to gauge how well they understood what was communicated.

Virtual Training: Test Frequently for Understanding

For many centers, training home-based agents is the same process as with inhouse staff. It takes place in the classroom alongside other trainees who will be working onsite. Because of its completely virtual environment, VIPdesk's training program relies on a learning management system that uses a blend of instructor-led group sessions and self-study learning modules. Although it is conducted entirely online, it is highly effective. VIPdesk's home-agent training program has been recognized by the Small Business Administration and by the Helios HR Awards.

What makes it so successful? Hatch shared the following practices from their award-winning training program. Before new-hire training begins, new home-agents attend pre-orientation sessions to learn what it's like to work from home, and to answer their questions about working for VIPdesk, such as setup, infrastructure, administrative issues—basically, taking care of all of the housekeeping tasks that can distract a new-hire's focus on the first day.

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Scott Murphy
Assistant Director of Customer
Benefits, Employees Retirement
System (ERS) of Texas

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Day 1 of the training program indoctrinates new-hires into VIPdesk's brand experience management culture, and then Day 2 and forward consists of client-branded training. Executives from the client organizations often "attend" training to speak to new-hires about their organization's goals and mission. "Brand ambassadors love to hear that type of message from the horse's mouth," says Hatch. "You can feel the excitement. We love to have that engagement with them, and we have extreme visibility because everything is done via the Internet on a Web-Ex-based platform, so team members can readily interact and ask questions."

One of the challenges of virtual training—or really, any type of training—is to ensure the trainee's understanding of the material. To verify that the knowledge is being absorbed, the training program includes daily tests for understanding. In addition, daily evaluations measure each team member in a dozen different categories, such as engagement, asking questions, etc. At the end of each day, trainers meet with the director of training to map out their team's progress and identify individuals who may require followup conversations and further training.

Unlike traditional training approaches in which new-hires spend several weeks in the classroom, then spend time on practice calls or in a training bay before moving onto the floor, VIPdesk follows a "share, show and do" methodology, says Hatch. "Often, when new-hires start taking calls, everything they learned goes out the window, especially if they're at home and don't have other team members around to cheer them on. We extend the program so that we can do that in small pockets throughout the training timeframe."

For example, with a five-week training program, agents will begin taking calls in week


three. They'll go on the phones for two hours, then they'll meet with their training group, ask questions and get feedback. "It helps to build a sense of camaraderie within the group. They're learning, but they're *doing* as they're continuing to learn more about the program," Hatch says. "We find that that's the most effective way to make it work in a virtual environment."

Practical Pointer: To encourage high engagement levels with virtual training, maintain a small trainer-to-agent ratio for each class. Hatch recommends 1:12, or 1:16 at a maximum, depending on the complexity of your products and/or services.

Don't Try to Reinvent the Wheel

Work-at-home programs have been around for a while, and contact center leaders have come up with creative and effective approaches to managing home-based staff.

Networking and sharing ideas is the best way to start a new work-at-home program or improve an existing one, says Murphy. He speaks about his work-at-home program at a variety of industry conferences, and has picked up valuable ideas from talking with other contact center leaders.

Best agrees: "Partner with someone who has been a leader. Don't try to create something that is new. Use what's already there, build upon it and make it successful for your environment." 



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FROM THE PIPELINE ARCHIVES

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Finding the Value in Home Agents, February 2011: A look at the benefits that home-agent programs can bring an organization, as well as common mistakes that companies initially make which can raise the costs.

Inside View: Vegas.com, March 2011 (case study): A contact center with a culture as unique as the city it promotes.

Managing a Distributed Workforce, September 2010: 15 practical pointers for staying connected with agents who are distributed.

Inside View: Access Development, April 2010 (case study): A home-based contact center program offers a cost-effective strategy for handling rapid growth.

The Case for Home Agents, July 2009: Balancing the benefits and concerns of home-agent programs—key considerations to help your decision.

Technology: A Critical Enabler for Home Agents, July 2009: An overview of the infrastructure, tools and technology plan to ensure a successful home-agent program.