

How to Manage the Remote Workforce

Best Practices to Drive Engagement and More Effectively Forecast and Schedule in the Remote Contact Center

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There are many reasons companies move to a work-from-home model, ranging from a crisis to a changing business model amid market disruption.

Regardless of the reason for the shift, there are challenges and benefits that can be realized with a work-at-home model. Employees can find relief and security—in the comfort of their own homes—from long commutes or disruptions to local infrastructure caused by a crisis or natural disaster. In return for reduced stress and increased flexibility, employers can lower overhead costs while reaching a larger pool of qualified job applicants.

Making the move to work-at-home, however, comes with its challenges. This ebook provides tips and best practices for managing the remote workforce.



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Be Consistent

The more things change, the more they (should) stay the same

Setting up the contact center for work-at-home success follows a simple premise: All things should be the same as if employees were working in a brick-and-mortar contact center.

To enable business as usual, employees need to be able to use critical business solutions. Using solutions like NICE Workforce Management (WFM) will likely require the involvement of your corporate IT team to set up access for authorized users. This includes tools used by the planning team, which needs to plan, schedule and monitor the business. Ensure that security controls are altered as needed to enable remote access to applications that are available in the cloud, including scheduling features such as those offered by NICE WFM’s WebStation, which allows employees to see their schedules, bid for shifts and request time off virtually. You’ll also want to ensure that any manual or paper processes are converted to electronic ones.

Just as in the brick-and-mortar setting, teams need a clear understanding of—and agreement with—business priorities. In difficult times, this might mean that all possible resources are scheduled to manage and handle existing customers only, with new customer contacts deprioritized for a short period. Schedules may also need to change. Proactively reach out to your team to understand their unique situation and needs as they shift to working at home.

Encouraging customers to make full use of self-service options for help can not only reduce the strain on your teams during a difficult time but also increase the speed of customer satisfaction, increase conversion rates and revenue and drive customer engagement.¹ Customers largely prefer self-service channels to speaking with a customer representative,² but they don’t always know where to find the answers they need. Actively promote self-service resources, such as FAQs, online how-tos and knowledge bases. Note, however, that changes to the self-service strategy can have an impact on your forecasts.



1. Leggett, Kate. “Your Customers Want to Self-Serve — It’s Good For Them And Good For You.” Forrester, 23 May 2019.
2. Selby, Paul. “Moving up the Customer Self-Service Curve.” CustomerThink, 23 July 2019.

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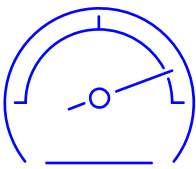
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Make sure that you continue to track progress against goals (quarterly, monthly and so on) for all KPIs and maintain a focus on training and career development; you’re taking people you hired to come into an office every day and asking them to work from home. If you fail to set proper expectations or help them adapt, employee productivity and retention will suffer.

Lastly, ensure that you—and your teams—are sticking to a working routine. Write down a list of deliverables, and schedule multiple, smaller breaks throughout the day. Dress like you are going into the office, as though your boss will video chat you at any moment. Discipline is key to being a virtual employee.

How Your KPIs Might Change with a Move to Remote Work



- ✓ Current SLA, AHT, Hold Time and other KPIs need to be **revised and agreed to**. You’ll see some initial volatility with these metrics; this should flatten after an adjustment period.
- ✓ **Measure adherence** more closely to ensure that there’s not a dropoff due to distractions not normally present in an office environment, such as children who are at home.
- ✓ **Monitor attrition and shrinkage** closely.
 - **Attrition:** The majority of the employees you just sent home came to work for your company because of the office environment. In the long term, this may not be a viable solution for them. Get ahead of this and look for ways to capitalize on new hire training and recruiting.
 - **Shrinkage:** Between increased uncertainty and a new way of doing business, it’s not uncommon to see 30 to 40% increases in shrinkage.
- ✓ **Capacity planning:** Last week you might have been planning for seat capacity, while next week you’ll be helping IT track load balancing and VDI licensing.



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Open Communication

Keep lines of communication open to engage employees

Communication is key to keeping agents who are working from home feeling engaged and supported. Remote teams face unique communications challenges, with different schedules, time zones or even cultural barriers making it feel difficult to feel part of a team. ensure that people are following industry standards for home office employees.

Finding the best ways to communicate increases in importance when you’re not working face to face. Agents no longer have opportunities to ask teammates or a manager for advice when they run into them on a coffee break, and it can be challenging to create a sense of camaraderie. In fact, while Gallup’s State of the American workforce report found remote workers overall to be slightly more engaged than their in-office counterparts, the report also found that employees who spend more time working remotely rather than in the office may miss “important social and collaborative opportunities that are integral to engagement and wellbeing.”³

Another study published in Harvard Business Review found that it’s easy for remote workers to feel left out unless they’re working for companies that have taken steps to build trust and connection between their remote and on-site employees.⁴ “Unless we take extra measures to build trust and connection with colleagues, we pay dearly for doing so,” the study’s authors, Joseph Grenny and David Maxfield, wrote. To combat these challenges, ensure that your teams can communicate in the same ways they would if they were working on site with tools such as instant message, Skype and Microsoft Teams. Develop a communications plan that encompasses all departments. Communication should be both formal and informal, work-related and non-work-related.

Google Hangouts Chat and Slack channels enable virtual “water cooler” conversations that keep teams engaged and give them opportunities to connect personally with their co-workers. Team and group chat rooms can facilitate ongoing communication—just be sure that each room has enough capacity to accommodate the team using it. Whenever possible, use video tools like Zoom rather than phone calls to replace the face time remote workers no longer have with their peers and supervisors. This not only humanizes interactions but also allows team leaders to peek in on their home office environment to ensure that people are following industry standards for home office employees.

3. “State of the American Workplace.” Gallup, 12 Dec. 2019.
4. Grenny, Joseph, et al. “A Study of 1,100 Employees Found That Remote Workers Feel Shunned and Left Out.” Harvard Business Review, 14 May 2018.



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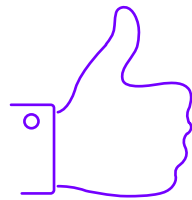
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These collaboration tools can also be used to host bi-weekly one-on-one meetings and enable the one-on-one mentoring opportunities that help employees feel comfortable asking for advice. Update calls and video chats with managers and stakeholders throughout the date give the planning team the opportunity to update the business on key performance metrics, actions in place and outstanding tasks. Managers and supervisors can use them for daily team meetings to review the previous days’ results, see whether goals were met, and check in quickly to take the pulse of their teams. By blocking off time on each day on their calendars, supervisors can ensure that they’re consistently available to give advice; nearly half of employees report that the most successful managers check in frequently and regularly with remote employees.⁵

Recognition can also go a long way toward making employees feel valued and engaged. Be deliberate about offering positive recognition: Teams will be working remotely, and a lack of team and leader interaction can in turn impact team positivity and morale if consistent recognition and praise is not top of mind each day. This can take the form of a formal “Shout Out” from supervisors or peers at the end of each day or in-the-moment recognition for an employee who has gone above and beyond—whatever you do, be creative and make it your own!



Lastly, stay positive. If you or your teams are in a position to work from home, you’re lucky – this isn’t an option for everyone. Remember that difficult times are temporary; you’ll be amazed at how your perspective changes when your attitude does.



5. Grenny, Joseph, et al. “A Study of 1,100 Employees Found That Remote Workers Feel Shunned and Left Out.” Harvard Business Review, 14 May 2018.

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In times of crisis or during periods in which everything is in flux, call patterns may be changing by the day, or the hour even.

Rereforecast often to ensure that your forecasts are aligned with your actual staffing needs. As mentioned earlier, be aware of how changes to your self-service options—or to how you promote those options—affect your staffing needs. Your workforce management solution needs to be able to learn from any new customer demand profile, and having this latest thinking will improve future forecast periods.

As contact centers deploy remote workers, they often focus first on catering to their immediate demand channels, such as phone or chat. Don't overlook the importance of also managing deferred demand (such as physical mail, email or back-office requests), because these channels can drive calls to the call center if they're not handled effectively.



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Enable increased flexibility

Working from home should allow for more extreme changes to schedules, should the need arise. Being at home can give the agent a bit more flexibility, for them and for the business, in responding to schedule changes.

Increasing your ability to respond to extreme changes in scheduling needs will require you to adopt a mindset of flexibility – and the tools and policies to support that mindset. If you don’t already have schedule change policies enabled, do so, and ensure that your workforce management solution offers rules that help you manage this process so you can allow changes in real time from managers and/or agents. “What If” analyses on schedules and customer demand enable senior stakeholders to model the impact on the business for the foreseeable period and take appropriate actions to mitigate the risk.

Among the tactics that enable increased scheduling flexibility

BLOCK AND SPLIT-SHIFT SCHEDULING, which provide employees with longer (unpaid) breaks throughout the day. For example, a traditional 8-hour shift can be broken up into two four-hour blocks or splits with a one or two-hour break between them. This allows employees to manage their work-life balance, such as using the break to attend to children at home, all within coverage and SLA goals performed by schedule simulations. Block scheduling also enables planners to update agents schedules so that they can see when they need to change work type, which is critical in challenging times, when employees may need to work on different tasks at different times.

SPLIT SHIFTS. Working from home can open up a lot of flexibility, because there’s no commute required. You can still get the same number of hours of work out of your agents, but

1. it doesn’t have to be in one consecutive block, since they don’t have to drive to and from the contact center and
2. you can meet your contact center’s needs at higher peak times.



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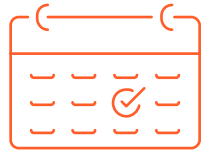
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For prolonged periods of remote working, agents will need regular touch points with supervisors and peers. Tools like NICE WFM’s Meeting Scheduler enable the planning team to optimize the best times for the business based on customer demand and agent schedules.

Don’t forget that some schedules will need to go back to normal; workforce management tools such as NICE’s WFM can allow planners to make temporary changes to agent’s schedules.

- ✓ **AVAILABILITY POINTS**, which can be used with or without split shifts. Set up business rules to make sure you get the coverage you need while allowing agents to enter windows of time that they are—and are not—available to work. You might be surprised by the time slots people are willing to work. Availability points can be particularly helpful for organizations in emergency or public health sectors that want to identify people who are willing to volunteer to take extra shifts.
- ✓ **SEAT LIMITS**: If you’re using fewer agents in the physical contact center, consider using seat limits to ensure that you have minimal staff across your locations while maximizing the effectiveness of those agents.
- ✓ **SHORTER SHIFTS**: You can use a bidding system to support shorter shifts at home. You can also use shorter shifts to eliminate breaks and lunches and ensure coverage.
- ✓ **ADDS, MOVES AND CHANGES**: Validate the process used for adds, moves and changes – virtually, compared to work at home.
- ✓ **A PHASED APPROACH**: Flexible schedules don’t have to be an all-or-nothing initiative. Contact centers can start small, offering flexibility to top performers or smaller groups of volunteers initially. This allows them to ease into a flexible model to ensure schedule integrity.



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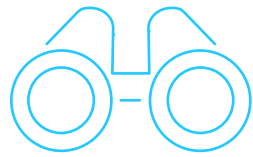
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Use intraday tools to respond to changing conditions in real time

The ability to utilize intraday reports and optimize resources throughout the day will be vital, as customer demand may differ during this period.

Intuitive intraday change management tools enable supervisors to monitor and proactively respond to changing conditions in real time. They allow the contact center to reevaluate needs based on the current day's volume, average handle time and service levels, not on a forecast that was created days, weeks or months ago, when the business needs and customer demand looked markedly different. In doing so, these tools eliminate the intraday stress of ensuring that agent resources are optimally aligned with customer demand by identifying solutions to address staffing gaps, proactively managing agent communication and by automatically adjusting employee schedules.



Again, consistency in processes and policies is important: Just as in the physical contact center, individual and team adherence goals should be followed, regardless of location. Ideally, your workforce management solution will monitor all channels (phone, chat, email, etc.) and offer transparency into all service levels and performance.



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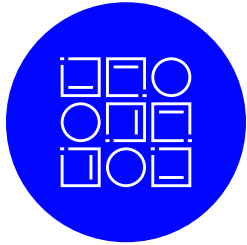
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**A work-at-home program,
done right, offers a multitude of
benefits to both employers and
employees.**

A work-at-home program, done right, offers a multitude of benefits to both employers and employees. Organizations can help keep their employees safe and give them an unsurpassed level of flexibility—no commute required—while contact centers reap rewards that can include reduced real estate costs, lower labor expenses, greater employee retention or simply compliance with local or national mandates.

NICE Value Realization Services is in this with you. Let us help you manage change as you transition to a work-at-home model. We help align your people and processes to decrease time to value and maximize the business impact of your NICE WFM investments.

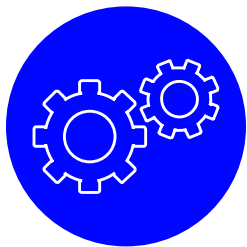
For more information, please contact:
VRS@nice.com



Advanced Services: custom work-at-home and integration solutions



Managed Application Services: technical management of work-at-home systems



Managed Operations Services: outsourcing of WFM Operation to NICE



Advisory Services and Business Consulting: work-at-home solutions

NICE understands that these are unprecedented times; take this opportunity to leverage resources and expertise from people who understand the intricacies of change in moving from brick-and-mortar offices to a work-at-home model.

Whether you're concerned about how to train people in this new environment or you're looking for best practices related to intraday change management, contact NICE Value Realization Services now—mention "Work at Home" and receive a free half-day operational assessment valued at more than \$10,000!



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About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center – and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform – and elevate – every customer interaction.

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