



Workforce Management Best Practices for the Work-From-Home Contact Center

Best practices to drive engagement and more effectively forecast and schedule in the remote contact center





There are many reasons companies transition to a work-from-home model, ranging from response to a health crisis or natural disaster, to adapting their business model amid market disruption. Regardless of the reason for the shift, there are challenges and benefits that can be realized with a work-from-home model. From the comfort of their own homes, employees can experience reduced stress and increased flexibility, and find relief and security from long commutes or disruptions to local infrastructure caused by a crisis or natural disaster. Meanwhile, employers can reap the benefits of lower overhead costs while reaching a larger pool of qualified job applicants and creating an attractive work-life balance for employees.

While making the move to work-from-home can reap many benefits for employees and organizations alike, it does come with its challenges. This eBook specifically provides tips and best practices for workforce management in a remote contact center.

Be consistent

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

Setting up the contact center for work-from-home success follows a simple premise: All things should operate as if employees were working in a brick-and-mortar contact center. That means as much as possible, agents should leverage the same technology, follow the same processes, and deliver the same level of customer support.

To enable business as usual, employees need to be able to use critical business technology. This includes the ability to not only access the contact center software used for routing and handling customer interactions—both voice and digital—but also the ability to access all workforce management (WFM) capabilities as well.

For agents this means the ability to see their schedules, bid for shifts and request time off virtually from any location. For supervisors and workforce managers, this also means the ability to generate forecasts, manage schedules and intraday activities, and run relevant WFM reports from home. If your contact center still uses any manual or paper processes—for example, printing copies of schedules or submitting agent time-off via request slips—you'll want to define electronic processes before making the transition.

Forecast **early and often**

In times of crisis or during periods of extreme flux, call patterns may be changing by the day, or even the hour. Reforecast often to ensure that your forecasts are aligned with your actual staffing needs. Be sure you are aware of any potential changes in contact volume or channel strategy that can have an impact on staffing needs. For example, to help mitigate potential increased strain on agents, your organization may more proactively promote self-service options to customers during these times. Your workforce management software needs to be able to learn from any new customer demand profile, and factoring in the latest strategy will improve future forecast periods.

As contact centers deploy remote workers, they often focus first on catering to their immediate demand channels, such as voice or chat. However, don't overlook the importance of also managing deferred demand, such as email, social media, or even fax or back-office requests, as ineffective support on these channels can drive increased call volume into the contact center.





Enable increased **schedule flexibility**

Working from home should increase the contact center's ability to make more extreme changes to schedules, should the need arise. Being at home—aka their workplace—can give agents more flexibility to respond to schedule changes or capitalize on opportunities to take on more hours.

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 software 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:

These scheduling techniques enable your agents to work the same number of hours, but with longer (unpaid) breaks throughout the day, all within coverage and SLA goals performed by schedule simulations. 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. Many agents are open to this approach given that they don't have to drive to and from the contact center, and it frees up

time during the day to take care of personal and family priorities. This scheduling technique can also enable contact centers to better meet the needs at higher peak times than traditional shift scheduling approaches.

Availability points:

Capturing all your agents' most current availability points will help ensure coverage of all business needs. You might be surprised by the time slots people are willing to work. 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. 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 during times of crisis.

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. Under most circumstances, contact enters 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.

Turn on a dime

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 and enabling managers to proactively adjust agent schedules and manage communication.

While real-time adherence (RTA) is important in a physical contact center, the ability to monitor RTA is arguably even more important in a work-from-home model. No longer can workforce managers and supervisors rely on a glance around the contact center floor to ensure agents are where they are supposed to be, when they are supposed to be there. Monitoring RTA will provide visibility into whether an agent is stuck on a call when they should be at lunch, or if an agent is late to return from break.



KPI considerations with a **move to remote work**

Current Service Level Agreements

(SLA), Average Handle Time (AHT), Hold Time and other KPIs may need to be revised and agreed to. You'll see some initial volatility with these metrics; this should flatten after an adjustment period.

Measure schedule adherence more closely

to ensure that there's not a drop-off 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 everyone. Get ahead of this and look for ways to capitalize on new hire training and recruiting.
- **Shrinkage:** In times of increased uncertainty or after a change in work model, it's not uncommon to see 30 to 40% increases in staff shrinkage. But the increased agent flexibility with a remote model may help mitigate call-outs as well. So monitor and adjust your staffing parameters to factor in potential changes in shrinkage.

Capacity planning

Before a shift to remote work, you might have been planning for seat capacity, while now you may be helping IT track load balancing and VPN licensing.



Proactively communicate to engage employees

Communication is key to keeping work-from-home agents feeling engaged and supported. Remote teams face unique communication challenges, with different schedules, time zones or even cultural barriers making it difficult to feel part of a team.

Business priorities and agent goals

Just as in a brick-and-mortar setting, teams need a clear understanding of business priorities. Maintaining consistency in processes and policies is important, and regardless of physical location, agents are expected to meet performance standards and KPIs. However, if the move to a remote workforce was in response to a crisis situation, then the contact center may need to reevaluate or rethink some processes and KPIs and ensure that any changes are clearly communicated to agents.

For example, the contact center may de-prioritize new proactive outbound contacts in order to focus all resources on managing and handle existing customers. Or perhaps they may temporarily loosen expectations related to average handle time or service levels.

Again, it is important that agents be aware of any changes in expectations, and that they have ongoing visibility to their performance when working from home. Continue to track progress against goals for all KPIs. Ideally your contact center software provides dashboards that arm agents with real-time insights, but if not, ensure agents are getting updates via email or virtual meeting periodically throughout the workday to keep them engaged in the team's success.

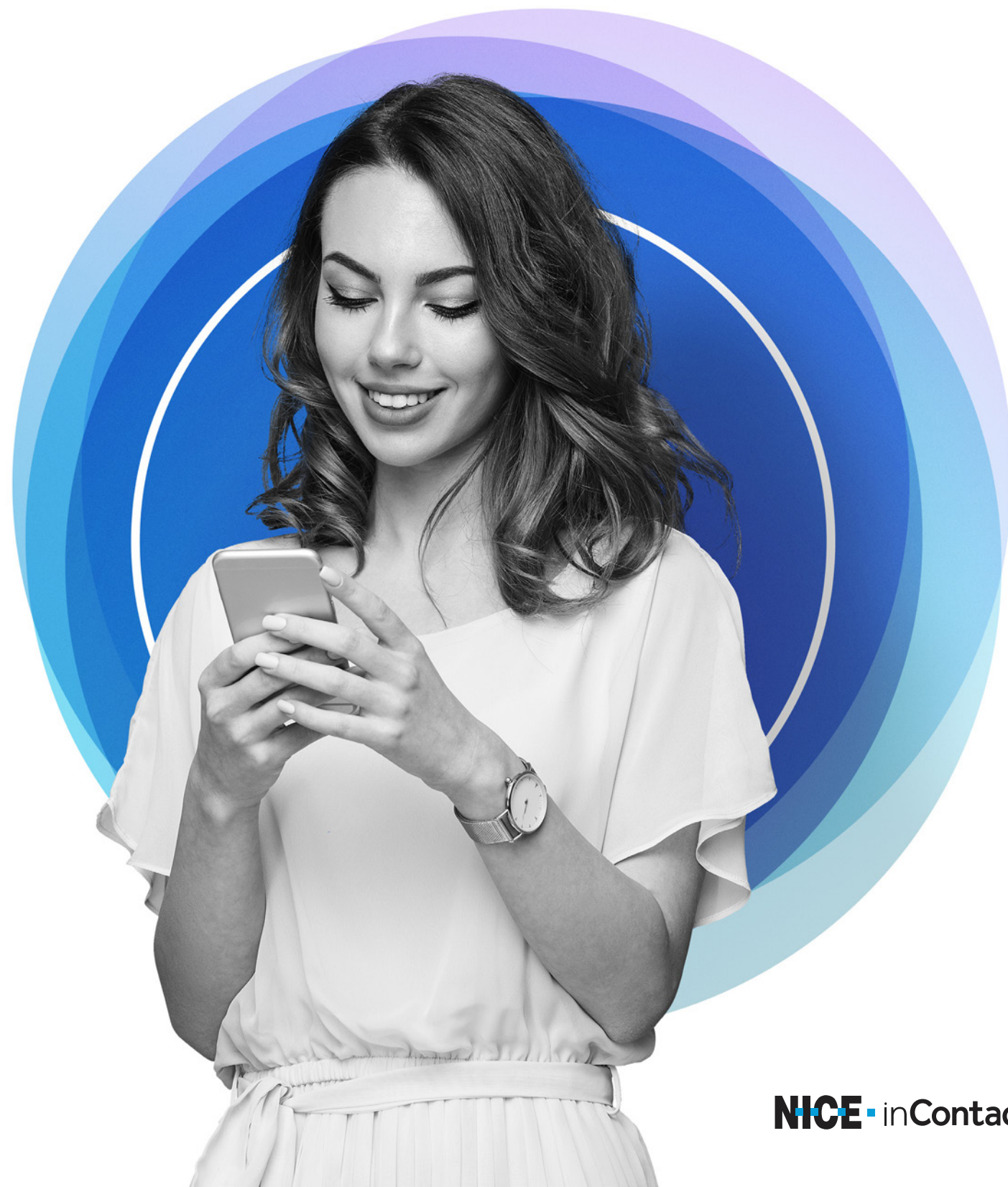
Also maintain a focus on training and career development. In many cases, you're taking employees you hired to come into an office every day and asking them to work from home. If you fail to set proper expectations or help them adapt, employee productivity and retention will suffer.



One-on-One meetings

Agents will need regular touch points with supervisors to stay engaged. They need the same level of coaching and development as they would in the office, but leaders must be even more thoughtful and deliberate in their efforts in a remote model. Agents can no longer flag their supervisors over for advice throughout the day or walk into their office. But leaders should make themselves just as available to agents from home by clearly letting them know the best mechanism to reach them for escalations or other questions, and by scheduling regular check-ins throughout the week. Supervisors can block off time on each day on their calendars to 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.

One-on-one meetings are also an important time for supervisors to understand each agent's unique situation and needs as they shift to work-from-home so accommodations can be made where possible. For example, are they juggling kids at home because school is out? Or caring for an ill loved one and need to take them to appointments? Leverage the meeting scheduler capabilities in your WFM software to optimize the best times for these meetings based on customer demand and agent schedules.





Team collaboration

Finding the best ways promote team camaraderie increases in importance when you're not working face to face. Ensure that your teams can communicate in the same ways they would if they were working onsite with tools such as instant message and other enterprise collaboration systems. Develop a communications plan that encompasses all departments. Communication should be both formal and informal, work-related and non-work related.

Whenever possible, use video collaboration tools rather than phone conference calls to replace the face time remote workers no longer have with their peers and supervisors and humanize interactions.

Deliberate collaboration and communication are not only important for agents but also for the employees on the workforce management and leadership teams. Update calls and video chats with managers and stakeholders throughout the day give the workforce 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.

As you move to a remote workforce, **NICE inContact** can help

A work-from-home program, done right, offers a multitude of benefits to both employers and employees. As agents move to a work-from-home model, it is important to replicate and restore team engagement and morale and ensure accurate forecasting and scheduling to maintain SLAs and deliver exceptional customer experiences. 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.



About NICE inContact

NICE inContact works with organizations of all sizes to create extraordinary and trustworthy customer experiences that build deeper brand loyalty and relationships that last. With NICE inContact CXone™, the industry's most complete cloud customer experience platform, we enable an exceptional agent and customer experience—every time and on every channel.

Americas, N. America +1 866-965-7227

Intl +44 (0) 207.002.3000

Email: info@NICEinContact.com

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The logo for NICE inContact. The word "NICE" is in a bold, black, sans-serif font. A small blue square is positioned between the "I" and "C" of "NICE". To the right of "NICE" is the word "inContact" in a black, sans-serif font, with a lowercase "i".

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