



liveops®

A BLUEPRINT FOR SUCCESSFULLY DEPLOYING REMOTE AGENTS

Executive Overview

In today's tough economic environment, many companies are moving to virtual contact centers, which can be staffed by home-based agents or a combination of home-based and site-based agents. This innovative approach to setting up a contact center – which leverages software delivered using a Software-as-a-Service (SaaS) model – means that your company is free to find and hire the best agent talent from anywhere in the country.

Because your potential agent pool is so much larger, you can find higher-quality agents who can provide higher-quality service. This is no small thing – particularly when you're facing increasing commoditization of products and services; customer service can be one of the few ways you can differentiate your offerings. And as many businesses have already discovered, you can also:

- Reduce recruiting and training costs
- Eliminate or significantly reduce capital expenses
- Lower agent attrition with a higher quality of life and greater job satisfaction

In addition, sending your agents home to work is a creative, no-cost way to give them a virtual pay raise while simultaneously boosting productivity and lowering the carbon footprint of your business. Did you know that avoiding the typical 40-minute commute can equal up to eight weeks of regained productivity – and significant cost savings for agents in terms of gasoline and car maintenance? This paper overviews essential best practices for sending your agents home so they can work successfully as remote agents. Learn how to enable real-time performance management, optimize training with distance learning (or e-Learning), maximize agent desktop security and align compensation with performance.

Each best practice outlined is based on LiveOps' years of real-world experience running one of the largest virtual contact centers in the world with over 20,000 independent agents. You'll understand what it takes to manage agents successfully and how to achieve the 360-degree visibility and control needed to maximize their performance.

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BEST PRACTICES FOR OPTIMIZING COSTS, IMPROVING AGENT RETENTION, AND ENHANCING THE CUSTOMER EXPERIENCE.

PREPARING TO SEND AGENTS HOME

If you are reading this paper, then you've either already decided to send your agents home or are seriously considering doing so. You'll be joining thousands of companies like West Marine, a national marine supply retailer that increased its competitive advantage by deploying remote agents.

Management at West Marine wasn't even thinking about sending agents home – they just wanted to upgrade their contact center infrastructure. But when the lease for their contact center facility came up for renewal, the economic downturn had hit, and management wanted to focus on reducing costs. They decided that the best way to do this was to not renew the lease on their physical contact center facilities and have their agents work from home. They needed a way to enable this transition without losing visibility and control, so they chose the LiveOps On-Demand Contact Center Platform. By sending their agents home, West Marine has been able to eliminate expensive leasing costs for

one of their contact centers – and ultimately improve agent utilization across their regional contact centers. In addition, West Marine has been able to maximize store employee utilization – which is important given the regional nature of the business. With the LiveOps on-demand platform, when business is slow in one region – and sales people are not in a store selling – they can take customer service calls or field questions from stores that are busy.

But deploying remote agents successfully – as demonstrated by West Marine – requires new technologies and best practices that are quite different from those used by a traditional contact center. For example, you need a way to maintain – and even heighten – the level of oversight for remote agents as you do for traditional contact center agents; managers will have to remotely train, oversee, and monitor agents, as they can no longer walk the floor to listen in on calls, answer questions, and mentor agents face-to-face. In addition, to sustain

high customer service levels, you will need to use different types of key performance indicators (KPIs) to monitor and incent home-based agents to perform at their best. Equally important, you need to continue to provide a secure IT environment that protects customer and company data – even as agents work from their homes.

This paper summarizes essential best practices developed by LiveOps, which uses its proprietary, on-demand contact center platform to manage 43 million calls per year and deliver 99.99% availability. In an annual period, the LiveOps virtual contact center securely collected 15 million credit card numbers, over 1 million bank account numbers, and over 100,000 social security numbers.

Our extensive, real-world experience means that we know first-hand the challenges that businesses face when sending agents home and how to overcome them to ensure success.

LiveOps' best practices for deploying remote, home-based agents fall into the following categories:

- Selecting the right technology platform
- Enabling real-time performance management
- Optimizing training with distanced learning
- Maximizing agent desktop security
- Aligning compensation with performance or talk time
- Creating a sense of community

SELECT THE RIGHT TECHNOLOGY PLATFORM

To implement these best practices, you first need an on-demand contact center infrastructure that automatically routes calls to the right agent and enables remote agents to access it using a PC and high-speed Internet. In addition, this infrastructure needs to provide a comprehensive, integrated set of capabilities to support a remote contact center operation. For example, it needs to:

- Enable interactive distanced learning
- Provide agent access to contact center systems from any phone, anywhere
- Support complete visibility and control from a management perspective
- Record and enable easy replay of every call, if desired

- Support 360-degree visibility into agent performance
- Instantly track every agent action
- Ensure tight agent desktop and data security
- Support performance-based compensation plans by tracking relevant metrics for each agent
- Support real time, performance-based and skills-based call routing
- Support diverse multimedia and multimodal communications

One of the fastest ways to implement these and other essential capabilities is to use an on-demand platform designed from the ground up to support the entire virtual contact center lifecycle. These types of platforms offer significant benefits over the "build-your-own" approach to contact center solutions. With the right platform, you can quickly deploy all of the functions needed to support remote agents – and do so in a way that is less costly, lowers risk, is scalable, and ensures a faster return on investment (ROI). In addition, a fully integrated, on-demand platform provides greater visibility into operations; it can capture data in the course of daily business, centralize it, and make it readily available for reporting and analysis – functionality that is essential to effectively managing home-based agents.

Traditionally, the only way to access this kind of integrated contact center solution was to purchase a "contact center in a box." But today, you have

more innovative, flexible options. For example, you can use an on-demand contact center solution that's hosted in "the cloud" (i.e., the Internet) by an application service provider. For instance, the LiveOps offers its on-demand contact center in the cloud, giving our customers benefits such as:

- A pay-per-use model that keeps costs down
- Elimination of nearly all up-front capital investments, such as real estate, furniture, and premise-based equipment
- A fast, hassle-free deployment that requires no hardware installation
- Elimination of ongoing software maintenance and version issues
- Ongoing access to new enhancements without having to perform upgrades

The approach you take to leveraging on-demand contact center software depends in part upon your business and IT needs. If your existing platform is solid, but it doesn't support some of the best practices for remote agents, you can integrate it with an on-demand solution, such as the LiveOps platform, to complement or enhance your current environment. Alternatively, if your entire contact center environment is at the end of its life, then consider replacing it with a comprehensive, on-demand solution that supports both on-site and remote agents. With an on-demand, SaaS-based solution, you can quickly transform your contact center for

greater efficiency and effectiveness while lowering costs.^{1,2}

ENABLE REAL-TIME PERFORMANCE MANAGEMENT

When agents work from home, performance management is all about communication and transparency. Agents still need someone to report to, provide feedback on how they are performing, and suggest ways to improve their performance. They want to know how they are doing today (particularly over the last 50 calls). And they still need encouragement, answers to questions, someone to monitor their daily activities – virtually and in real time – and continuous incentives to perform their best.

LiveOps recommends using the following best practices that enable effective, real-time performance management in a virtual contact center.

Best Practice #1: Enable virtual, 24x7 supervision so that agents know someone is watching and listening all the time.

In a virtual environment, it's critical that agents understand that someone is constantly watching and listening to. This visibility is a requirement for success – and it sets up unique needs from a technology perspective. As a best practice, ensure that your contact center platform allows you to:

- Record every call so agents know that someone might be listening at any time
- Support supervisor-to-agent chat

sessions in real-time to coach and assist agents, when needed

- Allow anyone who is a stakeholder to listen to a call (because in the virtual world, auditing isn't just for auditors)
- Regularly audit a representative number of calls to assess agent performance
- Quickly access performance information on each agent – in real time – so you can take action swiftly

In addition, you need a way for callers to give feedback on agent performance (for example, via customer feedback surveys) and escalate issues quickly, if required.

Best Practice #2: Manage by performance and route calls to the best agents.

In a virtual agent community, the only way to manage agents effectively is to measure their performance in real time, reward those agents who meet performance goals, and take action with those who don't. This requires that you have an automated way to capture and report on all relevant agent and campaign performance metrics, such as:

- Queue length
- Call hold times
- Handle times
- Sales numbers
- Media effectiveness



“Achieving better agent utilization and greater operational efficiency were important factors in our decision to adopt a virtual call center model. What set LiveOps apart was its ability to rapidly deploy and integrate with our existing systems. We were up and running in a matter of days versus the months it would have required with other vendors.

Matt Wise
Senior Director of
External Customers
West Marine

¹ LiveOps white paper: A Faster Way to Achieve Greater Call Center Cost Optimization Using On-Demand Call Center Platforms. Available at www.liveops.com.

² LiveOps white paper: The Top Six Considerations When Evaluating On-Demand Call Center Technologies. Available at www.liveops.com.

- Offer effectiveness
- Script effectiveness

In addition, as a best practice, leverage these metrics to determine the best agents to route calls to. For example, with the LiveOps contact center, you can use performance-based routing to ensure that new calls are always routed to the highest performing agents (based on metrics you determine). This ensures that customers have the best experience possible and agents are incented to perform their best on every call. The business benefits can be significant. For example, one of LiveOps customers used performance-based routing and increased their conversion rate from 29% to 52%. They simultaneously boosted agent productivity (revenue per agent minute) by 13% from \$4.13 to \$4.67.

Best Practice #3: Put the “performance” monkey on the back of the agent – rather than supervisor.

As a general rule, the more you can measure and communicate, the more you can rely on agents to self manage. As a best practice, when you have a contact center platform that gathers performance metrics in real time, you can create a culture around self-improvement. Communicate to agents that they are ultimately responsible for their training, professional development, and overall performance. Emphasize that they have the power to improve themselves and seek out the training, coaching, and other supports needed to achieve their goals. When you combine this cultural shift

with access to real-time performance metrics that enable agents to see how they are performing, you’re in a position to realize the best performance from each agent.

Remember: it’s still a rarity to work from home, so set high standards, and you’ll see that agents will be motivated to improve their performance because they don’t want to lose the flexibility and quality of life afforded by home-based work.

Best Practice #4: Establish multiple, virtual modes of communication.

As stated previously, when agents work from home, performance management is all about communication and transparency – because you can’t look over someone’s shoulder, walk around the floor, or chat at the water cooler. As a best practice, re-create communication channels via technologies such as real-time chat so that agents can talk to supervisors and other agents. You’ll find that with the right combination of virtual communications, supervisors actually have a broader reach and faster response times; there’s no need for agents to raise a hand and wait for someone to come to their cubicle to answer a question. At the same time, chat gives your management team a real-time view into what’s happening within your organization, as well as an easy way to broadcast messages instantly to all agents.

You can also set up message boards, forums, and online polls to support virtual communications. These technologies support real-time

performance management by enabling you to gauge the pulse of your agent community, identify issues that are hindering performance, and fix them quickly. When agents know that you listen and take action on the issues that are most important to them, it gives them a feeling of involvement, which ultimately leads to improved performance.

Best Practice #5: Keep virtual feedback and coaching focused on an agent’s most recent performance.

When working with remote agents, it’s important to focus on very recent performance; you get the best outcomes when you deal with the immediate. Yesterday’s performance metrics are the latest you want to look at. This means you need a contact center platform that allows you to:

- Generate up-to-date reports
- Find and listen to recent call recordings by any agent
- Report on outliers and exceptions (for example, calls that take too long, calls where sales values are low, or calls that didn’t result in sales)

As a general rule, don’t be punitive with feedback. Audit for what’s most important – not for everything – so that auditing is a tool for helping people, not punishing people. If an agent isn’t doing well, have them work with their team leader to listen to their own calls, compare them to model calls illustrating best practices, and identify helpful training resources. In addition, enable agents to flag calls that were problematic, and make it safe for

them to ask, “How can I have performed better?”

OPTIMIZE TRAINING WITH DISTANCED LEARNING (OR E-LEARNING)

As you send agents home to work, consider using distanced learning, or e-learning technologies, to train and certify them on new campaigns, products and services, applications, and more. With distanced learning, you can overcome some of the common challenges associated with traditional classroom training, such as poorly designed content, overemphasis on lecturing, failure to address multiple learning styles (auditory, visual, read/write, and kinesthetic), and limited interactivity. Lack of interactivity can be a serious problem; research shows that when adult learners don't do something new to do every seven minutes, they disengage.

In contrast, when you use well-designed, self-paced e-learning, it drives agent performance because it rewards participation, motivation, and independence. Agents can choose which learning sessions to participate in and learn at their own pace. This model can also dramatically increase comprehension and retention of material because it's easier to make learning interactive (for example, every few screens, you can built in practice time or a quiz to test agent understanding). In addition, because the investment you make in good instructional design is reused across all agents, you know that every agent receives a higher quality, more consistent learning experience.

From a financial perspective, e-learning offers other benefits as well. LiveOps has found that its customers can compress training time by 30% simply by moving from a traditional classroom model to e-learning, as they no longer need to waste time with administration, bathroom breaks, and lunch breaks. In addition, e-learning makes organizations more agile and scalable, as you can quickly train additional agents on new or modified campaigns to meet changing business requirements.

LiveOps recommends that you apply the following distanced learning best practices to ensure a successful launch of e-learning for home-based agents.

Best Practice #1: Implement a learning management system.

Implement a learning management system that acts as a bridge between the content and learner. The system should provide the tools and capabilities needed to manage learning remotely, such as test scoring for each learner, support for interactive learning methods (such as gaming courses), and reporting and tracking of training modules as they are completed by agents. It should also deliver e-learning in a way that's logical and enables you to monitor agent experiences in real time (for example, so you know how long it took agents to complete modules).

Best Practice #2: Implement an effective learning methodology.

When creating content to populate the learning management system, use a closed-loop learning methodology



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to ensure development of high-quality content that accomplishes your objectives. For example, LiveOps uses a five-step ADDIE model for creating materials: analysis, design, develop, implement, and evaluate.

The goal of analysis is to make sure that the learning is linked to actual agent performance. The best way to do this is to design training around performance-based learning objectives that are aligned with strategic goals and related metrics. The end result is training that drives agent performance because it's engaging and changes agent behavior in ways that improve outcomes.

When developing content, build in an interactive experience every three pages. For example, you can have agents go through a real-life simulation or perform a skills practice exercise, communicate with fellow agents to hear their questions and experiences, and engage with them in virtual role playing. In addition, use a blended learning approach so that you engage all adult learning styles (auditory, visual, read/write, kinesthetic). For instance, you can include self-paced modules, study guides, learning games, practical application, quizzes, and interactive video demonstrations.

Delivering and implementing content can happen in virtual classrooms – not just traditional classrooms. You can make learning opportunities available on demand or at a specified time when everyone “shows up” online, which can help you foster a vibrant learning community for agents.

When evaluating program effectiveness, don't just settle for assessing each agent's reaction to a course. Instead, analyze and report on training at multiple levels, including changes in agent behavior, the degree to which you achieved predefined business impacts (such as reduced handle time), and the true ROI of your training for the business (for example, can your agents close more business faster?)

MAXIMIZE AGENT DESKTOP SECURITY

When you send agents home to work, they are no longer working within the secure confines of your corporate building and network. You may have seamless, eight-layer firewalls in place, as well as comprehensive systems and applications security for your brick-and-mortar contact center – protection that agents likely aren't even aware of. In contrast, when agents work remotely, they leave these controls behind, so you need to re-create them and shift some security burdens to agent shoulders.

Your choice in technology platform greatly impacts the amount of effort required to achieve appropriate levels of agent desktop security. The good news is, when your platform supports the right combination of virtual technologies, you can achieve heightened security oversight and stronger controls than is possible in traditional contact center settings.

Best Practice #1: Set up compliance training sessions before agents work from home and communicate security standards.

When agents work from home, they

are more vulnerable to security risks. Not only do they work over the Internet, which can place data at risk, but when a caller makes an unusual request for information, there's no one nearby to ask, “Is it okay to answer this question?” That's why agents need to be trained to think: Is this appropriate? Am I protecting the organization? How do I keep my environment secure?

The first step is to educate agents about security common sense and heighten their awareness about the need for security. Set up programs to educate your staff about security and the responsibilities they will have as agents working from home. Review and role play common social engineering strategies designed to trick them into providing callers with sensitive information. And communicate security standards that must be complied with as a prerequisite for employment. For example, LiveOps requires that its agents follow the “Six Steps to Protect Your PC”:

- Turn on an Internet firewall
- Keep your operating system up to date
- Install and maintain antivirus software
- Install and maintain antispyware software
- Enable strong passwords
- Always lock unattended PCs

The goal is to make security a part of every agent's thinking before you send them home.

Best Practice #2: Implement tight desktop and data security – and validate it regularly to ensure the integrity of agent systems.

Most likely, the security systems that you use to protect agent PCs internally will not work for agents working from home. So you need to “push” enterprise security down to home users and constantly monitor that it is in place and working. In addition, you need a way to be sure that you’ve limited each agent’s ability to see, touch, copy, and manipulate data.

By far the easiest and most effective way to implement tight desktop and data security is to deploy a contact center platform with built-in security, data access controls, and monitoring capabilities. For example, LiveOps has developed Secure Desktop, which helps to secure the data that agents handle. The platform provides each agent with a secure, virtual, encrypted workspace (or desktop) that allows them to access data in a secured and highly controlled environment. It also disables cut-and-paste features and prevents agents from printing data or saving it to fixed and removable drives. Secure Desktop also helps to ensure that only agent computers that meet LiveOps’ rigorous security standards are allowed to log on to the LiveOps contact center platform.

Every time an agent’s computer attempts to connect to Secure Desktop, it must complete in-depth antivirus, personal firewall, system integrity, and service pack compliance checks. Secure Desktop can also help detect and block key loggers and

screen scraper viruses as they execute in real-time. All agent desktops can be remotely monitored and managed by the LiveOps Secure Desktop Dashboard, which LiveOps customers can access on a 24x7 basis.

The alternative to leveraging security built into a contact center platform is to proactively maintain the security capabilities of each home-based PC via remote software upgrades. This may require that you own all agent PCs and take them back when an agent no longer works for the company. Maintaining security in this way is a far more complicated and costly way to ensure adequate agent desktop security.

Best Practice #3: Manage your distributed perimeter with a “need to know” policy and use tools to control data access.

Generally, the more tasks and functions that your agents have to perform, the greater the access they need to your systems and data. The key to maintaining tight security is to limit their access to data and application types on a “need to know” basis. For instance, if they need access to credit card numbers to handle a customer call, you may choose to only allow them to view the last four digits.

The easiest way to implement this functionality is to leverage a contact center platform with sophisticated data access controls built in. For example, LiveOps uses a feature called Secure Exchange to ensure highly sensitive data never leaves our environment. As customers speak and



Because the security systems you use to protect agent PCs internally won’t work for remote agents, you need to “push” enterprise security down to home users and constantly monitor that it’s in place.

record sensitive information, agents can't listen in. This data is then stored in PCI-compliant vaults, ensuring the tightest security. Alternatively, you can have agents collect the information and enter it directly into your contact center system. But this isn't optimal, as it provides a way for remote agents to write the information down, which means you lose control of the data.

Best Practice #4: Provide remote agents with 24x7 support to address security issues.

One of the best investments you can make to improve agent desktop security is to provide agents with 24x7 security support. If agents have to look through manuals when security questions arise, the likelihood of them handling issues correctly decreases considerably; in many cases, they don't have time to look up the right answer, so they take their best guess. But if you make it seem as if security experts are just a cubicle away and ready to help, LiveOps has found that agents are highly likely to pick up the phone, talk to an expert, and follow through on expert advice on everything from how to handle social engineering strategies to dealing with system errors. Ideally, you want to equip these support resources with remote access tools so they can access agent PCs, if needed.

You can also complement this 24x7 support by establishing of a virtual community that focuses on security; sometimes, agents prefer to reach out to a peer who has greater experience with security issues – for example, though a security forum and chat room.

Best Practice #5: Raise security visibility by proactively measuring and communicating security metrics and maintaining a 360-degree view of agent activities.

In our experience, agent desktop security quality goes down when you're not able to regularly audit home-based agent PCs. That's why you need a way to track related metrics in real time, such as how many PCs were infected with viruses and if security is going up or down in real time. Armed with this insight, you can take proactive steps to tighten security, as well as communicate your overall security status to the agent community so they can take responsibility for it.

At the same time, you need a way to constantly monitor agent behavior as a way of keeping agents on their toes – just as you do in a traditional contact center. You can re-create this oversight virtually by deploying remote monitoring of agent screens, monitoring calls, and more. When agents know that everything they do is always available for auditing, it helps to ensure their best security behavior.

ALIGN COMPENSATION WITH PERFORMANCE OR TALK TIME

As stated previously, in a virtual contact center world, you can't physically observe agents to make sure they are maximizing their productivity or effectiveness. The way you measure people's performance ends up driving their behavior. So if you are paying agents by the hour, you could potentially be paying agents for unnecessary downtime – or living with sub-par productivity and performance levels.

The best way to address this issue is to pay per minute of talk time or for

actual performance (for example, based on number of sales). Once you define the metrics by which people will be measured and compensated, you want to use your contact center platform to measure these metrics in real time and pay agents accordingly.

The business impacts of aligning compensation with performance or talk time can be significant. For example, VForce – a LiveOps customer who uses our platform to support a team of 60 home-based agents – realized a 20% increase in agent productivity by simply changing their compensation structure. They found that agents weren't calling the next customer as quickly as they could and were taking too many breaks. Moving to a performance-based pay structure enabled Vforce to align agent behavior with company objectives.

FOSTER A SENSE OF COMMUNITY THROUGH VIRTUAL COMMUNICATIONS

Successful virtual contact centers find ways to recreate – and even improve upon – the types of peer-to-peer interactions that agents experience in traditional contact centers. As a best practice, provide remote agents with multiple ways to ask questions of other agents, stay connected to the company, and build a meaningful social network. For example, you can support online chats and establish in-house forums so that agents can talk offline about anything without fear of repercussions (barring obscene language and personal attacks on others). Businesses can also implement a peer-to-peer "coaching" process whereby agents can listen in on calls and provide constructive feedback to

other agents – feedback that can help improve your customer satisfaction and service level scores.

Establishing multiple, open lines of communication not only increases job satisfaction and retention, but also gives management an inside view into areas of agent frustration. By monitoring these communications, you can proactively identify and address issues in order to reduce turnover and foster community loyalty. Responding to agent needs can go a long way toward making home-based agents feel connected to the community and valued for the services they provide. These communications also empower the community to self regulate. For example, if an agent doesn't have a great attitude and vents on forums, other agents can respond and turn the situation around without management intervention.

LEARN MORE

Taken together, these best practices are vital to ensuring a smooth and successful transition from a traditional contact center to a virtual contact center staffed with home-based agents. And in nearly all cases, applying them is much easier and less costly when you deploy a state-of-the-art contact center platform designed from the ground up to support virtual work.

For example, the LiveOps On-Demand Contact Center Platform offers a comprehensive, SaaS-based contact center solution that you can deploy in days. The platform supports every process required to manage a virtual

call center. Intuitive, fully integrated applications provide unprecedented visibility and control into every call center activity – right down to individual agent performance and calls. Business users are empowered to control the effectiveness of their call centers by centrally managing every call center function in real time. And call center management and agents can log in from anywhere in the world using just a PC and an Internet browser.

For more information about setting up a remote contact center or leveraging the LiveOps On-Demand Contact Center platform, please visit www.liveops.com.

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