
The Practical Guide To Hiring, Managing, and Retaining Remote Contact Center Agents

Tips, insights, and expert advice on how to recruit smarter, onboard faster, and create (and keep) happier managers, agents, and customers.

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The “New Normal” for Contact Centers

Moving to a hybrid model of some in-office agents and some at-home agents has quickly become a requirement for contact centers wanting to maintain quality customer care, retain the workforce they already have, and attract contact center agents in what has become a very competitive hiring market.

According to the [5th Talent’s April 2021 Contact Center Industry Work at Home Study](#), contact center agents have fully embraced the flexibility that working remotely offers. But this hybrid work environment poses a conundrum for contact center managers: How do you support these two work environments but still achieve excellent customer service?

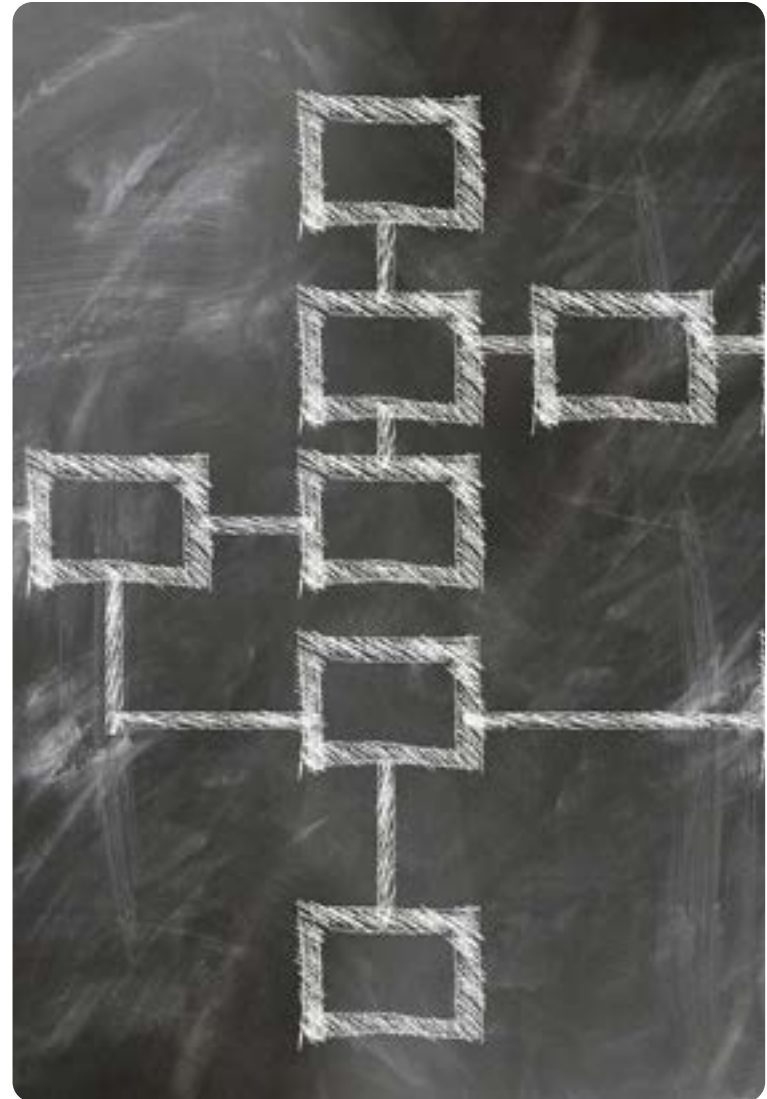
We created this “Practical Guide to Managing a Remote Contact Center” to help managers avoid a lot of the common pitfalls of moving to a hybrid environment and to ensure your contact center thrives in an era where customer expectations are at their highest.



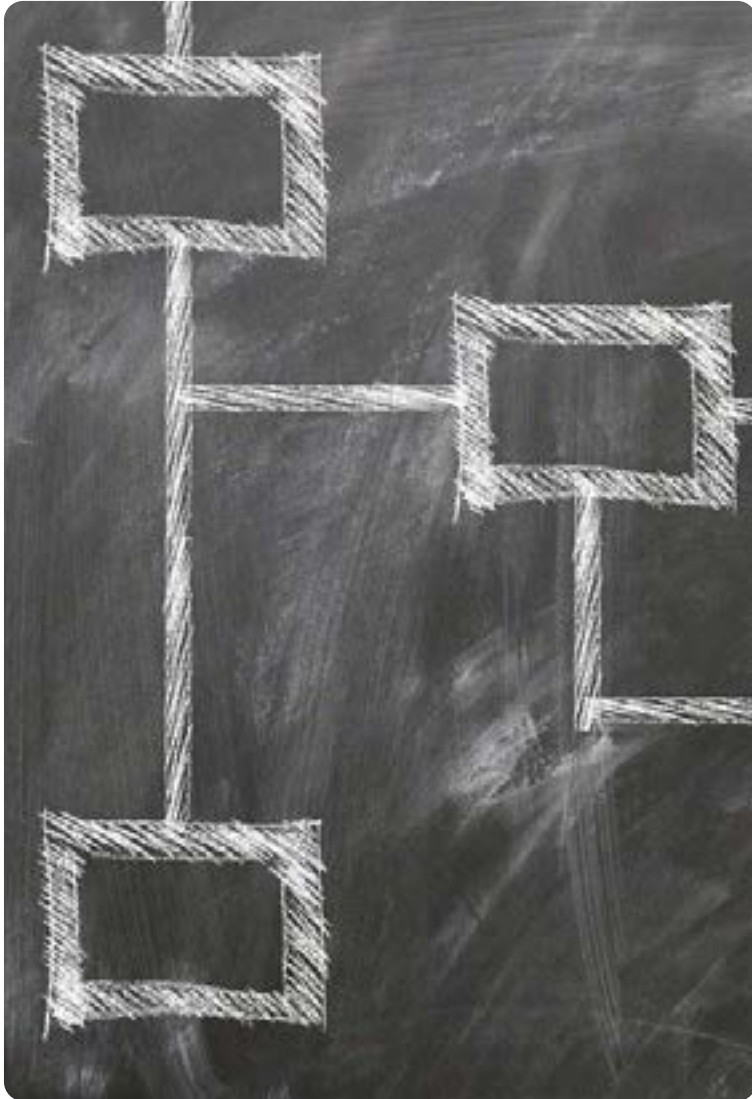
Start with Process

In moving to a remote environment, lots of managers will focus on changing their recruiting practices to attract more talent, hoping that they'll find agents who are self-motivated and able to manage themselves in a remote environment. Other managers will see moving to a hybrid model as a technology challenge and they will start shopping for software tools that help them manage a remote staff while keeping agents productive, engaged, and motivated.

But moving to a hybrid model is not just a people issue, nor is it just a technology issue, and what many managers neglect to address is the process of how customer service is going to be delivered in the new normal. In fact, we've found that the right way to build the perfect remote contact center is to start by defining the process of exactly how to do the job the right way.



START WITH PROCESS



By starting with process, you'll have a better idea of how many agents you'll need to handle current call volumes while doing the job correctly and you can look for technology solutions that reinforce that process in any environment. Otherwise, you're just guessing at how many agents and what technology tools you'll need.

Think of it this way: if you could hire the best managers and the finest agents but the process for them delivering great customer service is missing, how likely is it that your customers will be happy with your service?

Ultimately, the success or failure of your call center is dependent on how clearly-defined your process is. And especially in a remote environment, once you have a well-defined process for how to do the job right every time, it becomes much easier for your agents to do the job right regardless of where they're located.

The 80/20 Rule for Underwhelming Service

When establishing the process for handling a particular call type accurately, a lot of contact centers subscribe to what we call the 80/20 rule of process definition: about 80% of the process is defined and the remaining 20% is so complex or so rarely needed that it doesn't seem necessary or feasible to document it.

That remaining 20% though is a significant risk to performance because agents are left to make their own interpretations or they end up asking each other for guidance which could propagate the wrong process. Often, we find that among that 20% of poorly-defined calls are often call types that management never even knew they had because their audits were relatively sporadic, and the audits just never caught that issue.



Process is Even More Critical with a Dispersed Workforce

When working in a brick-and-mortar call center, it's easy for an agent to look over the cubicle to get an answer from a colleague. Similarly, it's easy for managers to give an agent feedback because that manager can stop by and talk to them their desk or arrange a quick in-person conversation. Naturally, a lot of contact centers that have come to depend on these built-in safety nets that a physical office provides, but obviously they don't exist in a remote working environment.

So, in moving to a hybrid model, you'll need a system that will compensate for the disadvantages of a remote environment by:

- Reducing the uncertainty agents face on calls and, subsequently, the times they need to enlist help from others.
- Ensuring that agents are doing the job correctly, even though you're not able to look over their shoulder on a call.
- Highlighting the individuals who need additional training, again because you're not able see them struggling in person.
- Calling out new interaction types that do not yet have defined processes but that are increasing in frequency.

As you can imagine, any system that does all these things is going to be heavily dependent on having highly detailed processes for most every call type—not just the most common 80%.

5 Signs of Poorly Defined Processes

There are a lot of symptoms that your process isn't well-defined and the consequences of all of these symptoms are only exacerbated in a remote environment. As we've said, many managers might look at these problems and think they're all people or technology problems. But with well-defined processes, you'll see most of these symptoms become less acute.

Sticky notes, notepads, and binders

Any time an agent uses a workaround such as these, it is an attempt to define (or just remember) a process that is unclear.

High call escalations

Agents who get to a dead end often just escalate the call to a manager. If your senior team is swamped in call escalations, it may be because your frontline agents just need better guidance.

Poor metrics, especially hold time

Another option for an agent who is unsure how to proceed is to just put customers on hold while they search through a knowledge base or ask a colleague.

A long list of FAQs

FAQ's are often a band-aid for bad process, since eventually (and quickly), a collection of FAQ's will grow past the point where it's useful and it becomes a disorganized and ineffective knowledge base.

Lots of Agent Alerts

A contact center constantly sending out agent alerts isn't a sign of good process. More likely it means that the quality assurance team is finding lots of agents who are performing certain processes wrong.

Managing in a Remote Environment: There are no Two Ways About It

As contact centers transition to a permanent hybrid model of in-person and remote agents, we've talked to a lot of managers who feel that they have a well-established system for managing in-person agents so now the challenge is just to figure out a system for managing remote agents. But this "two system" approach ends up unfairly penalizing or favoring certain agents and makes the job of managing those agents more time-consuming and cumbersome (just imagine starting every update meeting with "those at home need to... and those who are remote will need to...").

The question managers should be asking themselves is "What system can we create that makes the job the same regardless of whether an agent is in the office or remote?" That's the path to creating the ideal remote environment—make the process of doing the job and managing those doing the job the same. If you have two ways to do the job right, you're doing the job wrong.

REMOTE MANAGEMENT CHECKLIST:

- Do you give all your remote agents the same tools as your on-site agents?
- Do you judge remote and in-office agents by the same criteria?
- Are you measuring agents based on their productivity?
- Do you implement tools and processes that make the job easier for agents?
- Does your training focus on shortening time to proficiency?
- Do you offer every agent the option to work remotely regardless of tenure?
- Do you consider how new tools might change your ability to recruit and retain?

Recruiting Smarter

As contact centers reopen and managers struggle to recruit agents, managers are learning that their pre-pandemic recruiting practices are no longer sufficient in the new business environment.

But what if instead of just amending your old hiring practices, you take this time to start fresh? The work-from-anywhere movement is a great opportunity for proactive managers to recruit quality talent as a whole new world of qualified agents opens up (literally). However, it also means that top talent now has more employment options than ever before—making it important that you recruit as efficiently, consistently, and effectively as possible.

Establishing new hiring practices from scratch allows you to build a recruiting engine that attracts the most qualified agents, regardless of whether they want to work in a brick-and-mortar contact center or if they prefer to work remotely.

So it is critical to remember that first impressions are everything and an often-overlooked way of ensuring that your top prospects choose to stay with you is to make the entire recruitment experience a pleasant one.



Adopt Consistent Recruiting Processes

The key to efficient hiring in a remote environment is consistency in process. This means regardless of whether candidates will be working remotely or working in a physical office, they follow the same recruitment, application and interview process.

Tips for reducing friction in the recruitment process:

- Create recruitment materials with the ideal candidate in mind.
- Create a virtual application hub where candidates can upload their resumes and employers can quickly evaluate if the candidate meets the minimum criteria.
- Create a certification hub where candidates can go through a pre-employment assessment that offers them hands-on training with the technology and tools they will be using on the job.

As candidates move on to the interview phase, pay attention to key indicators of success:

- Do they respond to calls and emails quickly?
- Do they communicate clearly and effectively in writing and over the phone?
- Do they struggle with the virtual interview technology used to conduct the interview?

Identify the Ideal Agent

You shouldn't focus just on interviewing more candidates; you should be focused on interviewing the right candidates. And defining what type of agent you are looking for is a critical first step. Taking into account the company's future goals, objectives, and culture, create a pre-employment assessment that outlines the attributes an ideal candidate should have and use that assessment to quickly weed out employees who are not a good fit.

Next, it is important to identify what remote requirements you expect from the candidate. These can be basic things like minimum internet speed, equipment, and geographical restrictions. For example, do your candidates need to live in the same country that your operation is in?

Having a clear vision of the ideal agent, removing friction in the recruitment process, and keeping the interview process consistent regardless of where your agents will be working is key to finding, hiring, and keeping great agents.

Onboarding and Training

Once you have established a concrete plan for finding the right talent in this new environment, the next step is to evaluate your onboarding and training process.

Treat Every Agent Equally

When onboarding and training new agents, the process should be the same—no matter their location or experience. All agents will be on an even playing field in this new world. So, even though an agent might have years of experience, she may not have experience working in a structure where agents are scattered at home, in an office, across states or even countries.

Hardware: Ensure all agents have access to the hardware required to do their new job. As part of the onboarding process, give remote agents the same computers, headsets, and other equipment their in-house counterparts would receive. If you ask your new remote agents to purchase their own equipment instead, make sure they are reimbursed in a timely fashion.

Technology: Just as you provide the same hardware to all your agents, make sure you provide them with the same technology, keeping in mind that when it comes to agents and technology, less is often more. Your agents need technology that makes their jobs more efficient, effective, and consistent—not more complicated. It is also best to provide your agents a stipend to cover internet or other costs they accrue while working remotely.



Set Clear Processes, Timelines, and Expectations

Though you will have agents who have years of experience working in a contact center, you may also have agents who have always worked remotely. It is important that all agents are taken through the same onboarding and training process and given the same time to complete that process.

It's also important to set clear expectations of the hours they need to be in front of their computers daily. This will help with not only keeping agents accountable, but also ensuring that remote agents do not burnout attempting to work excessive overtime.

The Onboarding Process:

Here's how to set clear onboarding procedures and processes that will be followed by all agents, regardless of background:

- Re-evaluate onboarding procedures and processes. Do not take the old practices and adapt them for this new environment. Create new procedures and processes that set up all agents for success.
- Create a digital agent portal. A digital portal will allow agents to get quickly onboarded with basics like payroll and benefits while providing access to an employee handbook with clear work expectations.



Set Clear Processes, Timelines, and Expectations (continued)

The Training Process: As we stated earlier, all contact center employees should be provided with the same technology to provide excellent customer service. An often-overlooked facet of contact center technology is that it can aid in making the training process efficient, consistent, and effective.

Keep your agent tech stack simple. Giving agents what they need to achieve excellent customer service includes:

- an easy-to-use CRM system that integrates effortlessly with their other tech tools,
- a process guiding tech tool that takes the guesswork out of how to answer even the most complicated customer question (which reduces onboarding time as well)
- a webchat tool that will keep new hires connected to their supervisors, management, and leadership, no matter where they are working from.

Practice makes perfect. After setting clear expectation of how long the onboarding and training process will take, it is time to ensure that your agents can practice mock calls while using the technology, all in an open environment where they can make mistakes, learn, and become experts of all call scenarios. These mock calls can be evaluated using the technology of silent call monitoring systems. This technology was used before the remote environment emerged and it is one that should continue to be utilized in this hybrid work environment.

Create a Connected Culture

In a hybrid environment, a disconnect naturally develops between agents, managers, and supervisors. The focus of creating a connected culture should be on giving your agents tools that will put everyone on the same playing field and demonstrate to your agents that you are invested in their success, wellbeing, and overall satisfaction as they work to deliver excellent customer service.

Focus on:

- Cultivating collaboration. Agents are more likely to thrive if they feel they are connected to supervisors, managers, leadership, and coworkers. Give your agents the tools needed to efficiently and effectively reach out to their team members to get answers and feel a part of the team, no matter where they are working from.

Encourage your agents to have one-on-ones with other agents, supervisors, and managers that they will be working with. This can reinforce personal bonds and result in a more cohesive team environment. Managers should also set up

clusters of agents to do daily check-in calls with each other, strengthening their virtual support community.

- Improving workforce management. When you set expectations of how long your agents are required to be in front of their computers, you should also discuss how much of that time should be used for training and connecting with their colleagues, putting an emphasis on leaving work at work for your at-home agents. This reduces burnout and keeps your agents feeling part of a connected company that cares.

For over a year now most agents have been working from home and many agents see the opportunity of working from anywhere as a benefit, but at the same time many agents have been surprised by how isolating the experience has been. Focusing on creating a connected culture will make your agents feel confident and comfortable and will foster an atmosphere in which agents feel like they're part of your organization, regardless of their physical location.

Agent Retention

Over the last few months, contact center agents have seen considerable change, from increasing workloads to evolving work environments. And now many agents have to pivot again, this time to a hybrid work model where some coworkers are remote and others are in the physical contact center.

From an agent retention perspective, hiring managers primarily view this shift as a good thing, as it expands the available talent pool significantly. The flip side is that your agents are in higher demand and now have more job opportunities than ever before.

That's why it's crucial to make agent retention a top priority (if it isn't already). Your agents are often the only real humans your customers interact with. So why wouldn't you focus on making them feel supported, connected, and happy?



AGENT RETENTION



In the past, contact centers have implemented things like gamification, contests, and prizes to keep agents engaged and make this notoriously stressful job a bit more fun. But while these tools have some impact on agent happiness, in the new remote environment there are better ways to enhance your agents' work experience and improve customer satisfaction simultaneously.

The happiness equation is simple: happy agents = lower attrition = happy customers. Yet the realization of it is less so. Here are four common mistakes that lead to agent attrition in the work-from-anywhere world and how to fix them.

On the next page, we'll get into the four mistakes we see managers make when running a remote contact center.

4 Agent Retention Mistakes You're Making in the Remote World

MISTAKE 1:

Making working remote a reward for good performance

As physical contact centers begin to reopen their doors, a key element of agent retention is that all agents are treated equally regardless of their physical location. This means giving all agents the same technology and effective access to communicating with peers and leadership, but this also means that incentive programs and rewards for good performance are equal. There is a misconception is that agents working from home are less productive, and therefore only high-performing or experienced agents should be able to work remotely. This is not the case, as one [study of call centers](#) in China showed that agents were more productive when working remotely.

A common mistake that contact center managers are making, as they implement a hybrid work model, is that they are using the ability to work remotely as a reward for a job well done. Here are two reasons why that is a big mistake:

- **More job opportunities.** With the expanding job market, agents have a slew of remote work opportunities and could jump ship quickly if their preference is to work-from-anywhere. If you don't give your agents the option to work in-office or remote, they will find a company that does.
- **Bad company culture.** Using remote work as a performance incentive can create animosity and inequality in the workplace, affecting company culture and morale.

Go the extra mile and provide flexibility around where and when employees work and be creative about scheduling, downloading, uploading, and sending to multiple individuals in your HR team to get them into the payroll system and receive benefits.

MISTAKE 2:

Thinking agent retention starts on the day your agents start work

There is a misconception that the employee experience starts the first day your agent handles calls and interacts with customers, but this isn't the case. Employee satisfaction begins from their first touch during the interview process. And it continues to be impacted as you reduce friction throughout the recruiting, onboarding, and training process.

The goal for recruiting should be to reduce friction in the application process, identify the ideal agent early on, and make the interview experience an organized and straightforward process. Read [Recruiting Smarter: Key Tips for Hiring Quality Agents in the Work-From-Anywhere World](#).

You can simplify onboarding by using an online portal where paperwork can be done without

downloading, uploading, and sending to multiple individuals in your HR team to get them into the payroll system and receive benefits.

The training process should clearly state the time agents will have to move through it. This process should also remain consistent, regardless of where that employee is working (remotely or in the physical contact center). Here's how to effectively onboard and train agents in a remote environment.

**MISTAKE 3:
Adding more technology, not the right technology**

Consistency is key when you have agents working from different environments. A common mistake in keeping the delivery of customer service consistent is adding more technology tools. This only adds to agent frustration as they try to juggle and toggle back and forth between multiple platforms.

When you cut down on the tech that adds to agent stress and confusion, you free up budget that can be allocated to compensating agents for a job well done. Read [Don't Add More Technology, Add the Right Technology](#).

When agents first moved to a fully remote setting, there was a mad dash made by contact center leaders to purchase more technology to aid their agents. This was not the answer then, and it's not the answer now.

Provide your agents with the essential technology that focuses on them doing their job efficiently, effectively, and most importantly, consistently to ensure that agents, regardless of physical location, are delivering customer service the same way for every scenario, every time.

One technology you should use carefully is silent monitoring software. While it is a great way to go over mock calls with your new agents and give them tips on how to perform their jobs better, the use of monitoring systems after training can create an atmosphere where agents feel micromanaged and not fully trusted. Agent productivity and success can be easily assessed by statistics like AHD, Escalation, FCR, and more, allowing your agents to feel valued, trusted, and independent.

MISTAKE 4:

Not creating a company culture focused on connectivity and collaboration

Employees today are looking for companies that value their contributions, provide flexibility, support their growth, and show genuine interest in their wellbeing both inside and outside of work. To improve your organization's ability to attract and maintain human talent, you need to create a company culture that ensures they feel valued, connected, and involved in collaboration with co-workers, managers, and leaders.

Listen to your agents. Hold daily, weekly, or monthly calls where agents, managers, and leaders can openly express where they are struggling, suggest ways to better connect with their colleagues, or discuss other issues inhibiting them from doing their job effectively.

Provide tools and training that show your agents they are valued. By providing agents with the right technology, training in the technology, and the opportunities to give input on how it is enhancing or impeding their work, you demonstrate that you care about their wellbeing and ability to manage

their stress level. When your agents feel valued, so will your customers.

Create opportunities for growth in career advancement and earning potential. One of the factors spoken about regularly regarding agent attrition is that many agents feel like this stressful job lacks upward mobility. Regardless of where your agents are located, provide employees with clear paths for career advancement and opportunities for skill development. This motivates employees and enhances their overall capabilities.

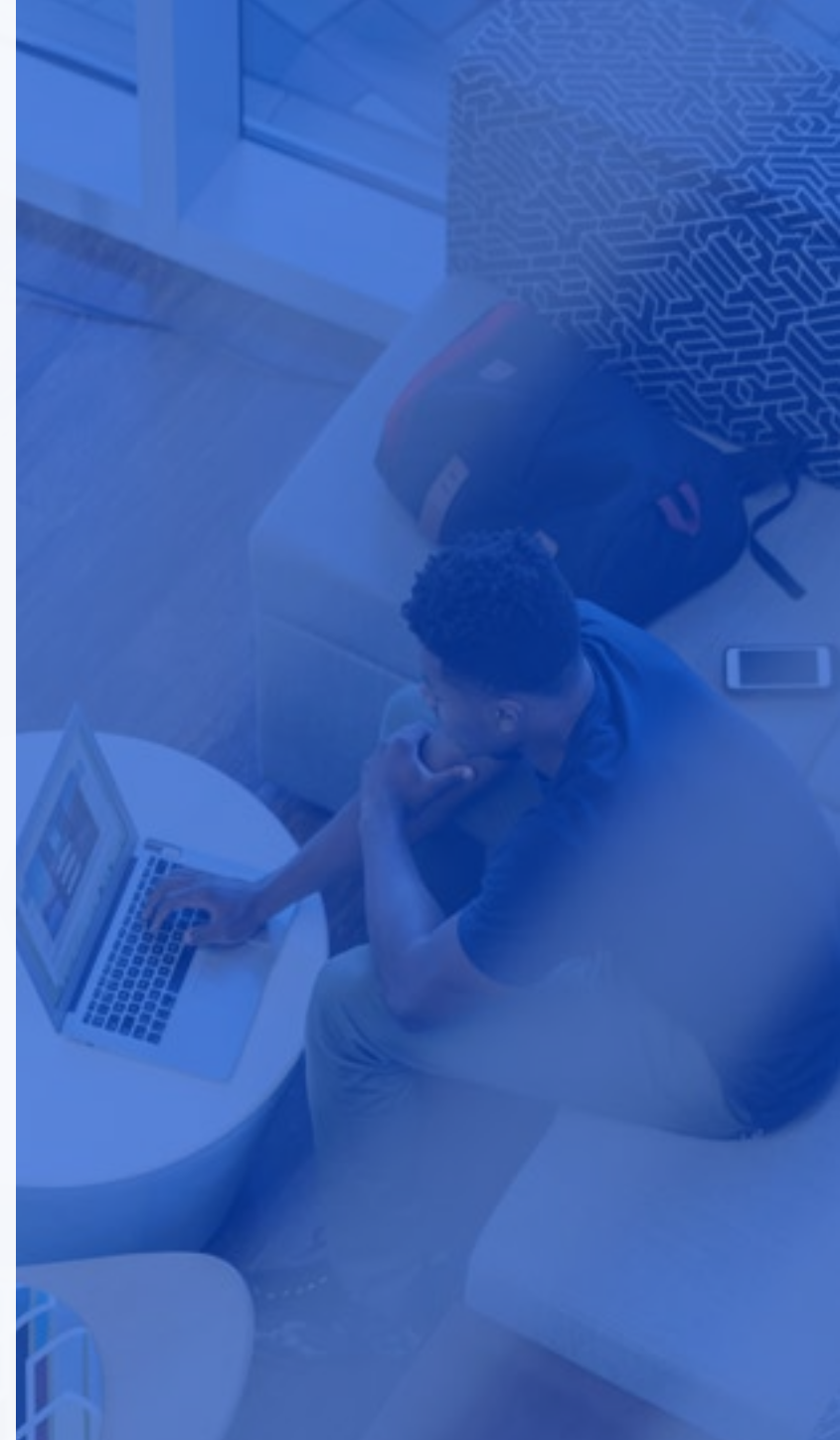
As the world reopens, agents find themselves in high demand with virtually unlimited options. To remain competitive in a competitive labor market, contact centers have to make retention a priority by focusing on making the job simple and consistent while creating a positive work environment no matter where your agents choose to work.

The Bottom Line

As contact center managers race to adopt the kind of hybrid model that has quickly become not just the norm but a requirement for contact centers wanting to stay competitive, a whole industry of agents has *already embraced this change*.

The contact centers that are already developing a reputation as an employer who caters to a remote workforce will get first pick of agents who now find themselves in demand and in the position to call their own shots.

If you're wondering whether you need to move to a work-from-anywhere model or when you should do that, the answer is probably "yes" and "right now."





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