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How to Go Virtual and Take your Contact Center to the Next Level

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Executive Summary

Whether you've managed a traditional bricks-and-mortar contact center or not, addressing the key differences in each of the four major areas this white paper describes will help you identify and avoid most of the pitfalls of "going virtual" before you start.

Executives who must plan, set up, and operate a virtual contact center can start by answering the traditional questions facing any project planner: What do you want to do, how will you reach your goals, and how will you measure success? Luckily, the factors that define success for a virtual contact center are identical to those for a traditional "bricks-and-mortar" facility.

Successful, cost-conscious managers must consider and monitor four key areas:

- Technology
- Staffing
- Training
- Management

It's just as important to deal with these areas in a virtual facility as in a traditional one. However, while they offer benefits that will take the services your contact center offers to the next level, virtual facilities present subtle challenges that can produce problems later if you don't address them when you begin planning.

This white paper highlights those differences so that you can "go virtual" most effectively and efficiently.

Technology

Organizations setting up virtual contact centers will select infrastructure technologies based on which of two alternatives they choose for the relationship between the contact center and its virtual agents. The alternatives are:

- Agents work as remote extensions of an existing contact center
- Agents work in a separate, stand-alone contact center

Remote extensions. If your virtual agents will work as remote extensions of your current contact center, you can simply add them to your Automatic Call Distributor (ACD). They'll answer calls using the same technology, be captured in the same reports, and be viewed in the same manner as on-site agents. The only difference is that the distance separating agents may be 500 miles rather than two feet across a cubical wall.

You'll choose between two virtual contact center configurations: either standalone or one smoothly integrated part of a larger network.

No matter which one you choose, you'll have many solid technology choices to implement it.

Stand-alone contact center. If your virtual agents will work in a separate, stand-alone contact center, you can choose between two technology configurations based on your ability and desire to share agents among contact centers. The first configuration is similar to that of a self-contained physical contact center. The agents in your virtual facility answer calls as usual. If the volume of calls exceeds the forecast for that center, either callers wait in queue or calls go unanswered.

In the second configuration, the virtual contact center functions as an integrated component in a network of contact centers, much as the separate contact centers in a traditional multi-site bricks-and-mortar system appear to operate as one. If the volume of calls exceeds the forecast for any center, the system distributes calls to whichever contact center, on-site or virtual, has agents available to take them.

The CRM/data configurations parallel the voice configurations, with the caller's voice and data elements integrated seamlessly on the agent's desktop.

Regardless of which option you choose, you will find a broad array of technologies for implementing your decision. All possess extraordinary functional, reporting, and monitoring capabilities to provide a uniform, transparent, efficient, and cost-effective virtual contact center environment for responding to your callers' needs and reaching your business goals.

Staffing

The human element of staffing plays just as critical a role as that of technology in the success of your virtual contact center. You'll have to answer another set of questions that define the numbers and types of agents and supervisors you'll need.

- Will remote agents perform the same tasks as on-site agents?
- What functions must your remote workers perform, and how many agents will you need to perform each role?
- Will you need your remote agents to work full-time or part-time?
- For what shifts will you require remote agents?
- Is your current job description for on-site agents suitable for recruiting remote agents?

- Will you need additional supervisors to support your virtual agents?

The questions illustrate the new, different demands virtual contact centers will place on your organization. Recognizing and accommodating these nuances in recruiting and managing a remote workforce will increase your likelihood of a successful implementation.

Whether you're recruiting for a bricks-and-mortar or a virtual contact center, the goals, objectives, content, and components of the recruiting process are identical. All of the steps in the process—application, interviewing, testing, assessing, background checking, drug testing, hiring, and on-boarding—are the same.

But the manner in which the process occurs differs completely from that for an on-site contact center because your recruiters will have *absolutely no face-to-face interaction* with applicants. Ever.

Just as the physical environment of your virtual workforce will differ significantly from that of a bricks-and-mortar location, your recruiting and hiring process will too, and requires modification as a result. You must design and implement a process that enables efficient and effective *remote* hiring. Although the process is different at first, your recruiters can easily take advantage of a wide variety of existing and tested tools, techniques, and services that facilitate remote interaction and hiring, resulting in a successful, productive process.

Your recruiters will need to add new hiring criteria for identifying applicants likely to succeed as virtual agents. Virtual contact center software can provide a complete performance audit trail, tracking every computer keystroke and recording every second of every call to assess whether an individual is *capable of* remote work. But it can't forecast whether an applicant is *suited for* remote work.

An effective recruiting and hiring process will consider whether the applicant possesses not only the skills and capabilities agents need, but also the appropriate attitude towards and comfort with working from home. Working in an "office of one" contrasts substantially with working in an office of 10-1000.

For some, the most unfamiliar characteristic of setting up a virtual contact center is the total lack of physical contact with all the applicants and the working agents. However, contact center managers and recruiters quickly adapt to the new situation and prove to be just as effective as other managers who continue to have face-to-face encounters.

“Training at a distance” is an extraordinarily well-developed process.

A variety of practices and technologies result in remote classes that are just as productive, and often much more cost-effective, than many traditional physical classroom operations.

Training

The success of your virtual agents depends on more than just the skills and aptitude your selection and hiring process confirms. Training them on the tools and content to successfully perform the job for which you hired them is equally critical.

Just as your recruiters will conduct successful recruiting and hiring without any face-to-face interaction with applicants, your instructors will also never meet their students. They will deliver training via virtual classrooms. Training departments can select from among a plethora of distance learning platforms to adapt and extend the in-person training they currently provide in physical facilities to curricula for virtual trainees.

Instructors can easily carry out content delivery, skills assessment, testing, role-plays, test calls, side-by-sides, and even tours of their facilities via tested, proven commercial technologies.

They won't require physical proximity to recognize excellence, implement a lesson plan, or manage students. They'll quickly become just as adept at noticing personalities, talents, and varying degrees of comprehension and understanding of new ideas in the virtual learning classroom as they were in the traditional one. They'll also be perfectly capable of recognizing and dealing with any different personalities and the “water cooler” cliques that appear and evolve during any gathering, whether in person or online.

Once your remote agents successfully complete their training, you'll transition them to the “live” virtual contact center to use the technical tools, content, and processes they've learned.

Management

Technology provides the infrastructure for caller interaction and the tools for measuring, monitoring, analyzing, and recognizing success. And quality staffing and training produce the human capital to deliver excellent service. But management must integrate and deliver results based on the infrastructure, staff, policies, procedures, expectations, and criteria that determine contact center success.

A successful organization of any size depends upon documented policies, effective training, clearly communicated

One of the most obvious, but difficult to implement, requirements for an effective virtual contact center is clear, effective two-way communication between managers and employees.

Some managers foster regular communication by requiring regularly scheduled one-on-one sessions in which both individuals work through a standard agenda that should bring any developing issues to light.

expectations, and appropriate consequences. The organization must define measurable attributes and set specific criteria to assess and describe individual and company performance objectively.

Managers of both on-site and virtual contact center environments know these dependencies well. However, as with recruiting, staffing, and training, managing a remote workforce in a virtual contact center requires a slightly different approach from that for managing a physical site. And, again, in the virtual contact center the processes and the content resemble those of a physical site, but the manner in which they occur and are managed differs.

Managers supervising a remote workforce conduct team meetings, provide feedback, conduct performance reviews, and perform all the functions a traditional contact center environment requires. But the team members interact in a virtual room, and the supervisor cannot provide face-to-face one-on-one coaching or feedback.

For remote workers, full and accurate communication is paramount. They need to understand the literal how, when, and why. On-site employees need to understand their roles in the company. And they want to be included and recognized as integral members of the organization. The same holds true for virtual contact center agents. There are many ways to “connect” virtual employees and recognize them as parts of the virtual team. Recognition and kudos for jobs well done are just as important to remote agents as they are to on-site agents sitting outside their supervisors’ doors.

Webster defines *communication* as the “process by which information is shared between individuals.” That means receiving, not just providing, information. As a manager, you must go the extra virtual mile to ensure that effective communication takes place in both directions when modifying your organization and processes to position your virtual contact center for success.

Going Virtual: You're Not Alone

Planning ahead for the differences your organization will encounter in the four areas of technology, staffing, training, and management will greatly smooth the path to and reduce the costs of successfully establishing a virtual contact center. You will also be able to set and manage expectations for other executives less familiar with the challenges and intricacies of going virtual.

You will not have to pioneer the trail to a new virtual contact center by yourself, either. Whatever your concerns about any aspect of this increasingly common transition, a host of vendors, service providers, and consultants stands by to bring years of experience to bear on your situation. You can contract for any individual component of your solution for which you want help—hardware, software, staffing, training, or management—or you can outsource the entire solution. Your call, as they might say.

Just remember, in implementing the virtual contact center, everything is the same, although slightly different!

About the Authors

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Alan is a 25-year veteran of the technology and contact center space. He has worked at such companies as Hewlett Packard, KANA Software, and the Aberdeen Group. Mr. Hubbard has also worked in several startup companies and he has designed, developed, and implemented multiple customer care organizations. He has his Bachelors in Information Systems and Masters in Business Administration from Bentley University.

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About NTI

National Telecommuting Institute, Inc., offers high-quality, cost-effective virtual staffing services. Founded in 1995 as a 501(c)(3) nonprofit organization, NTI pursues its mission to identify and develop work-at-home jobs for homebound Americans with disabilities.

NTI has provided trained work-at-home employees both to the largest U.S. government agencies and Fortune 500 companies, and to smaller businesses who want to outsource customer service and technical support operations to reduce costs. In particular, NTI has demonstrated the highest degrees of success in developing workforces for virtual call centers, virtual contact centers, and medical transcription.

NTI also develops partnerships with contact center hardware, software, and SaaS vendors to provide the staffing services that can help accelerate the successful launch of a virtual call center.

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