Contact Center Agility in the Post-COVID World

November 2020

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2020

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I.   Introduction

The pandemic brought out the best in contact centers and their employees, who demonstrated adaptability and commitment as they worked through the stressful times to ensure their company was available to assist customers in need. Contact centers displayed their agility and flexibility, as they successfully transitioned their employees to their homes in a matter of days, without major service disruptions. They demonstrated their critical importance in keeping a company open, even when the rest of the organization could not be available. Cloud-based systems and applications were vital in keeping businesses in production, even when offices were forced to close. Customer service agents proved that they could deliver an outstanding customer experience from anywhere in the world without having to be physically present in an office.

II.   Lesson 1: Improve the Customer Experience with Agile Employees: Allow Work-from-Home

Study after study has demonstrated the value and benefits of the work-from-home approach. At-home agents are more likely to be at their desk on time and more engaged and committed while on the job. At the beginning of the pandemic there were complaints about the time required to connect with a live agent, as interaction volumes increased substantially almost overnight. But once a customer reached an at-home agent, they were more likely to be satisfied with their experience than they were when most agents were working in an office.

It would be one thing if this finding had come from experiences with one or two companies, but when it was shown to be the case in many companies and studies, it became clear that this was a positive trend that should influence companies' contact center long-term staffing plans. It is an important finding, independent of the pandemic lockdown. Once the pandemic is past, contact center leaders should allow staff members – agents, supervisors, workforce management administrators, quality management specialists and business intelligence analysts – who want to work from home to do so. Job responsibilities and deliverable time frames should be fully documented, which is an industry best practice, but employee work preference makes a difference and should be respected.

III.   Lesson 2: Transition to an Agile Hiring Process: Align Hiring and Onboarding Practices

Using at-home employees is a positive game-changer for contact centers. It provides:

- Tremendous agility and flexibility

- Easy access to employees, regardless of geography

- Expansion of the resource pool

- Hiring of both full- and part-timers

These benefits should motivate companies to transition their 20- to 30-year-old staffing practices to ones that are preferred by digital natives.

Figure 1 displays the 9 steps in an agile hiring and onboarding process. Contact center staffing managers can either partner with their corporate human resource (HR) department or be responsible for these functions by themselves. Whichever approach is used, the companies that establish and adhere to a formal process are positioning themselves to be more successful than those that use an ad-hoc method. Here are the steps:

1. **Create job descriptions** – The job description should provide a clear explanation of the functions, responsibilities and company and customer expectations. The goal is to give candidates a clear understanding of what they will be doing, how much they will be paid, the working environment, and the reporting structure, so there are no surprises and the prospective agent will know what to expect and ultimately remain in their job.

2. **Advertise in online job boards** – Contact centers should post their positions in the leading online job boards, which change over time. DMG recommends testing a few of the online hiring tools and using the ones that are most effective for each of the positions.

3. **Screen applications** – Review and select the applicants who meet the established job criteria. If hiring hundreds of agents and other contact center employees on an annual basis, it is helpful to use an automated process for reviewing and screening job applications or resumes. If only a few individuals are being hired, it may not be worth the cost of fully automating the process. Either way, the application screeners should be trained to spend no more than 5 minutes on each application or resume to decide if an individual should proceed to the next phase. (If the screeners are unable to do this in a few minutes, then update the job descriptions to clarify the required job skills and knowledge.)

4. **Assess candidates** – Candidates who pass the screening process should be asked to take a series of online tests for typing speed and accuracy, verbal and written communications skills, problem solving, etc. (the tests relevant to the job).

5. **Conduct interviews** – Applicants who pass these tests should have a brief conversation with the HR hiring manager. If hiring for a phone agent, conduct the initial interview by phone. If the individual is being hired to handle written communications (email, chat, messaging, social media, etc.) conduct the initial conversation via that channel. And for those that pass this phase, use the same channel to schedule the candidate for an interview with the manager of the function, such as the contact center supervisor or line manager. Create a standard list of interview questions for each position. The person who is hiring should conduct the interview.

6. **Hire** – Candidates who pass the interview process should be referred to a HR manager. Each person should be told that they are going to receive a job offer and, if allowed in your state or country, provide the details during the interview process. Confirm that the individual is still interested and that the salary meets their expectation. Verbally communicate the start date. The HR manager should send the individual a standardized hiring letter that confirms their offer and start date, along with a description of the onboarding process.

7. **Onboard** – This is a key step in the process and one that is most challenging for work-at-home employees. It is likely to include many activities, including taking and passing a drug screening, conducting a criminal background check, validating one or two references (this step is often skipped but can be helpful), validating education levels, etc. All steps but the drug screening can be done by the hiring company with the written authorization of the candidate. Each applicant should be notified via email or "snail mail" once they have passed all of the checks, and be given the start date for their training program. It's advisable to ask them to reconfirm their interest, as it's typical to lose 10% – 20% of the applicants at this stage. For work-at-home employees, arrangements must be made to deliver a computer and headset to them and to assist them in setting it up. Three to 4 weeks should be allowed for the onboarding process.

8. **Schedule** – Candidates who reconfirm their interest in the job should be given their training and future work schedule, which may not be the same. This is a critical step, as digital natives are unlikely to accept a schedule that does not meet their needs. It's advisable for companies to be as flexible as possible in this stage and be prepared to modify schedules to satisfy their new hires.

9. **Train** – Conduct a 2- to 4-week standard training program, which will vary based on the needs of the organization. Training can be done virtually or on-site, again depending on many factors. Expect to lose another 10% - 20% of the people who participate in the training class. Some will be frequently late or will not show up every day. Others will be individuals who

do not understand the training materials and cannot pass the tests. While it's tough to weed out people during or at the completion of training, it's better to do it then than after they've been with you for a few weeks, if it's clear from the outset that they are not going to be effective in their job.

Figure 1: Agile Hiring Methodology
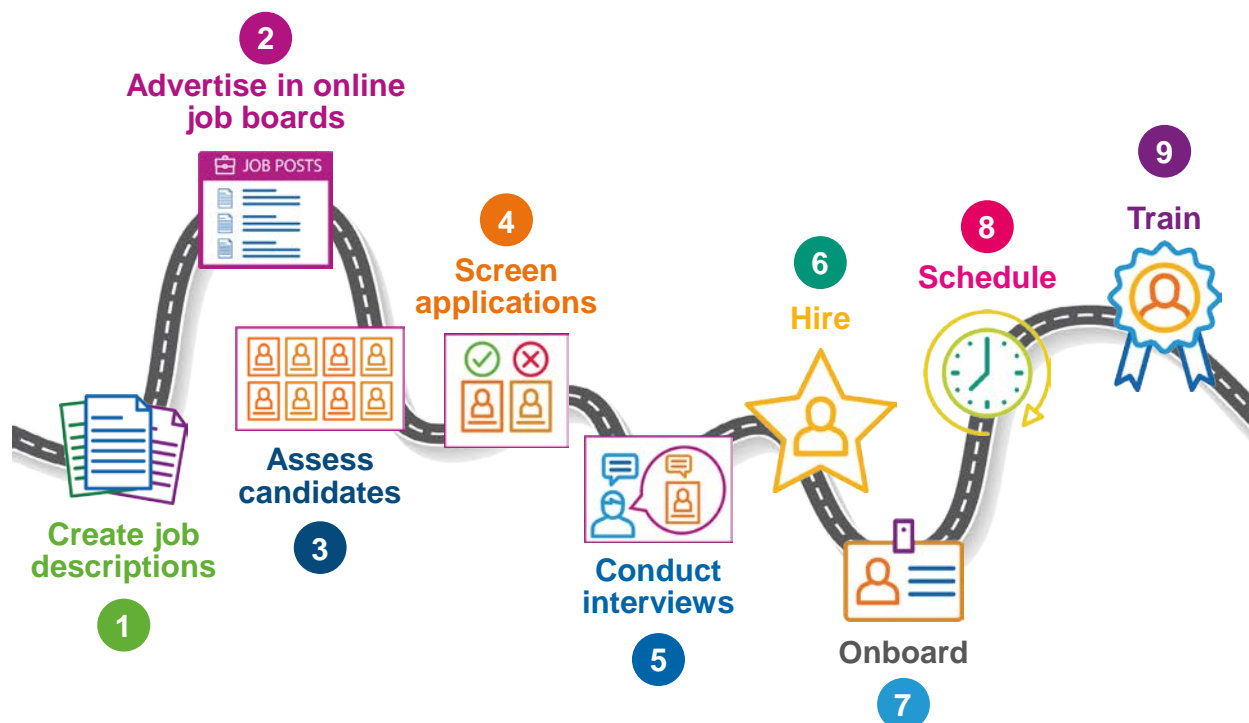
IV.   Lesson 3: Engage Employees with Flexible Scheduling: Improve Agent Satisfaction and Retention

Being a front-line agent in a contact center is a tough job, whether handling calls, emails, chat, messaging, or other channels. Agents interact with customers who are not always pleasant and have to retain and convey a great deal of information in a short amount of time, in a manner that satisfies each customer. Making it more challenging, contact center agents are frequently the lowest paid employees in a company. Due to these dynamics, companies need to come up with creative ways to retain these highly trained and valuable employees. One approach that is proving to be very successful is to engage agents by allowing them to select their work schedule. This is empowering, as it gives agents a great deal of agility in managing their work/life balance.

Agility in agent scheduling has emerged as a highly effective best practice for companies and their agents. This was a good idea before the pandemic, as it gave agents control of their professional life, and became more important once agents moved to their homes. The best practice is to allow agents to pick the hours and time increments that they want to work, instead of a set schedule. Consider a work-at-home agent who has to take care of their children during school hours. This agent may be able to work early and late hours or trade off days with their partner, forcing them to work part-time. Giving them the flexibility of selecting their work hours and the ability to trade with other agents or swap for different hours can transform the employee experience.

The contact center role will still have its challenges, but if it comes with the ability for agents to select a flexible and agile schedule, the pros of the position may balance out the cons. As seen in Figure 2, the best practices in an agile scheduling process are:

1. **Collect transaction volumes** – Contact centers need to collect transaction volumes for all supported channels, just as they do today.

2. **Generate agent staff forecast** – Once the data is collected and cleaned up, the workforce management (WFM) administrator needs to apply the appropriate algorithms to forecast for future periods, so that they know how many agents are needed for every 1-, 5-, 15-, 30- or 60-minute period in the day.

3. **Identify agent requirements by skill and work hours** – The forecasting tool should identify the number of agents and the skills they need to have to staff each time period.

4. **Have employees "bid" for working hours** – This is where the new-gen WFM process differs from the traditional approach, and where WFM solutions are highly differentiated. Instead of having agents request fixed schedules, they should be allowed to select the hours that they want to work.

5. **Grant working hours** – Let agents know which hours they will be working. As agents will be assigned hours, instead of shifts, employing flexible part-timers may be beneficial for contact centers.

6. **Provide agent schedules** – Notify agents of their schedules/working hours. Notification should be made using methods that are most convenient for agents, including mobility.

7. **Let agents swap schedules** – Agents should be invited to swap their schedules, as needed. Schedule flexibility and agility should be a benefit of working in a contact center.

8. **Dynamically adjust schedules** – With the right algorithms, forecasting solutions provide management with a good idea of the number of resources they need for every increment (time period) in each day. However, reality is almost always different from the forecast. Once a work day begins, the intraday management module should take control of the WFM solution and update automatically as agents use mobility to notify the WFM solution of a change in their schedule due to illness, need to swap hours, voluntary time off, request for overtime, or any other unplanned schedule change. This step gives contact center agents the flexibility they need and leaders the agility to balance the needs of customers and agents. The more agile the WFM solution, the better the performance of the department and agent engagement.

Figure 2: The Agile Agent Scheduling Cycle

Source: DMG Consulting LLC, November 2020

V.   Final Thoughts

Contact centers are often highly complex and technically advanced departments. Whether large, with thousands of agents, or small, with fewer than 50, they demonstrated their agility and responsiveness when they dealt effectively with the ramifications of the worldwide pandemic. Contact centers and service departments all over the world closed down their offices and successfully transitioned their employees home, with little to no disruption to service, in short time frames. Those that operated on cloud-based platforms had an easier time of it, as they had the benefit of the agility of the cloud delivery model.

In the past year, leading contact centers have taken a critical look at their operations and have institutionalized highly effective practices that were galvanized by the pandemic. These include having agents work from home on an ongoing basis, which requires a more agile hiring and onboarding process that provides the added flexibility of hiring agents from anywhere in a region, country, and possibly the world. Another important best practice contact centers are adopting is agile scheduling. This engages agents by empowering them to manage their working hours, including the ability to make changes easily, something almost no other department allows their staff. Companies that are transitioning along with the times and adopting new practices will have an advantage and will be better positioned to succeed.

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