RingCentral

Remote agent playbook

This is a manual to help you prepare your contact center with a business continuity plan to make remote work a functional reality.

Marcos Comacho
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Background

While working remotely continues to grow in popularity, the decision to allow teams to work from home has typically presented more challenges for some areas of business when compared to others. As organizations navigate potential emergency situations that force agents to work remotely, RingCentral can help you continue to work as a team to serve your customers even while they are working from home.

Problem

Business owners don't have the tools or resources to support a work-from-home agent support strategy.

Solution

- Transition agents to work from home using a cloud-based contact center platform and continue servicing customers no matter where agents happen to be.

- Incorporate digital channels like live chat, messaging, and social to reduce inbound call volume and service customers on their channel of choice.

- RingCentral team messaging allows agents to collaborate across the business to resolve customer interactions quickly, the first time.

- Provide the service your customers expect with a 100% remote support team.

The asset value prop

To learn what changes with remote support teams, what strategies you can implement now, and how to manage your teams across locations to service customers.

Top 3 key takeaways

- Agents who are more focused and productive can increase the number of resolutions they can achieve each day. As they spend more time taking calls and interacting with customers, you can offer faster service and improve customer satisfaction with your business.

- Eliminating the need to maintain a physical contact center or downsizing to a smaller one allows you to reduce operational costs to the tools and software you need to connect agents with customers.

- Hire the best workers, no matter where they are in the world. When your agent search isn't limited by location and schedule, you gain access to a wider knowledge base that can revolutionize the quality and depth of your team's abilities.

Go remote. Learn more about RingCentral customer engagement solutions to see how you can keep your business running in any situation.

Benefits of letting agents work from home

New communications apps have certainly made it easier for some employees to do their jobs from the comfort of their own home, but for some industries and positions, such as call center workers, managers question whether the practice could lead to lower productivity.

Though you may not be thrilled about having your employees work remotely, there are numerous business benefits to having a remote customer support team. Here are some of the top advantages of working in remote teams, from home or local coffee shops. If your contact center has the ability to utilize a remote workforce, this change may make a powerful, beneficial difference to the way you do business.

What are the benefits of remote working?

The decision to move from an office setting to a virtual team affects everyone in the business, so it's important to know the benefit of remote work for your team and customer service. There are many ways to implement remote work, each with its own perks, but there are some benefits that everyone can experience when working remotely.

1. Increasing productivity through remote work

Though many business owners and contact center managers worry about work getting done from home, increased productivity is often the biggest benefit of a remote team. A study presented in the *Harvard Business Review*, for example, showed that remote

workers accomplished almost a full additional day's amount of work per week when compared to on-site employees. Another study found that 45% of remote employees can get more done in less time and 44% are less distracted and more productive than they would be at the office.

For some agents, the ability to find the best environment and schedule for their needs naturally leads to better work. For others, improved productivity is a way to pay back companies that allow them to work from home.

In fact, 53% of remote workers said they would work overtime, while only 28% of in-office employees reported the same.

Agents who are more focused and productive can increase the number of resolutions they can achieve each day. As they spend more time taking calls and interacting with customers, you can offer faster service and improve customer satisfaction with your business.

2. Saving money in every department

Much of the costs associated with a business's overhead go to maintaining physical locations. While the biggest cost is real estate, they also have to pay for utilities, furniture, office supplies, cleaning services, internet access, and more.

Eliminating the need to maintain a physical contact center or downsizing to a smaller one allows you to reduce operational costs to the tools and software you need to connect agents with customers. Plus, a remote setup can also benefit your employees' personal finance needs.

According to *Inc. Magazine*, remote workers can save between $2,000 and $7,000 annually on food, childcare, travel, and personal items. These savings can lessen your team's stress across the board, contributing to higher job satisfaction and output.

3. Offering flexible schedules for working at home

A flexible schedule is one of the greatest contributors to remote work productivity. When agents can determine when it works best to spend time on business tasks, they can find the schedule that produces the best results. While some of your agents may work typical office hours, others can choose to work earlier or later shifts.

This allows your workers to find a more satisfying schedule, but it also extends your live-agent customer service beyond normal business hours, enabling late-night social media interactions or early morning calls.

4. Improving the work-life balance

Agent burnout is a serious threat, especially when your staff have to juggle family and personal needs with hourly shifts. By allowing agents to work from home, you offer the ability to find the balance that best fits their individual needs.

5. Gaining access to the world's best workers

When your agent search isn't limited by location and schedule, you gain access to a wider knowledge base that can revolutionize the quality and depth of your team's abilities.

The flexibility and benefits you can offer with a remote position are also more attractive to the talent you want. In a study completed by FlexJobs and Global Workplace Analytics, they found that telecommuters earn, on average, $4,000 more annually than on-site workers in the same position. Greater control over their work also lends to happier agents, which can then benefit you and your work immensely.

What changes with remote customer support?

If your contact center closes its doors to protect the health and safety of employees, or simply to help scale operations, customer service operations will move online. If you've never worked from home before, you're not alone. But as the nation and the world transition to remote work situations, it might be the new norm. Though you may be wary of this option, remote support poses little threat to your normal contact center operations. In fact, it may even improve them.

How do I provide remote support as a contact center agent?

First, it's important to note that you'll be working with new remote support tools, but your job will largely remain the same. You will still spend your days handling customer interactions and offering exceptional customer service. In fact, when you've successfully transitioned to your home office, customers won't even know there's been a change.

1. Preparing your workspace

Some companies provide remote work tools, while others allow agents to use their own. Check with your employer to see what their policy is. This might include laptops, microphone-enabled headsets, and digital tool logins. You'll also need strong internet service and phone connectivity to provide remote connection capabilities. If you can't provide the connectivity you need from your home, work with your contact center management to find an ideal solution.

2. Getting started taking calls

When working from home, you need a contact center platform that enables remote access. Once you've prepared your new workspace, it's time to set up remote access. Start by accessing your business's contact center software through your web browser, such as Google Chrome. Next, follow instructions to download and install the necessary software. You can likely work from a computer, both Windows and Mac, or even mobile devices.

Once you can access the remote system, you can log in to your remote desktop. Accessing your dashboard through remote networks is similar to screen sharing or desktop sharing, with the addition of allowing you to remotely control it.

3. Managing customer interactions

Customers will begin connecting with you to find resolutions to their problems, and you will use your contact center software to join the conversation.

Though you may now use a partner program or do more through a web console, you can still access the tools and system information you need through application sharing. You will be able to maintain customer happiness and continue your work without interruption.

4. Collaborating with team members

Now that you no longer work beside your coworkers, collaboration is a bit trickier.

Rather than walking down the hall, you'll access remote meetings through your contact center platform.

You can likely attend meetings from anywhere and make file transfers to share information. You will still work as a team, even though you may not interact face-to-face.


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How to manage a remote call center staff

There are endless benefits to implementing remote call centers, but the transition does present some challenges. One of the common concerns businesses have when moving to a remote operation is how they can maintain effective agent management when their customer service team is spread across multiple locations. By using these call center management tips, you can maintain your high call center and agent performance across time zones.

How do I effectively manage a remote call center?

Since your agents aren't in the same location, managing remote agents can be a bit trickier than typical call center management. You can't walk the floor or physically interact with your team, but you are still responsible to keep them engaged and productive. With the tips in this guide to managing remote agents, you can continue improving customer experiences and achieving great results for your business.

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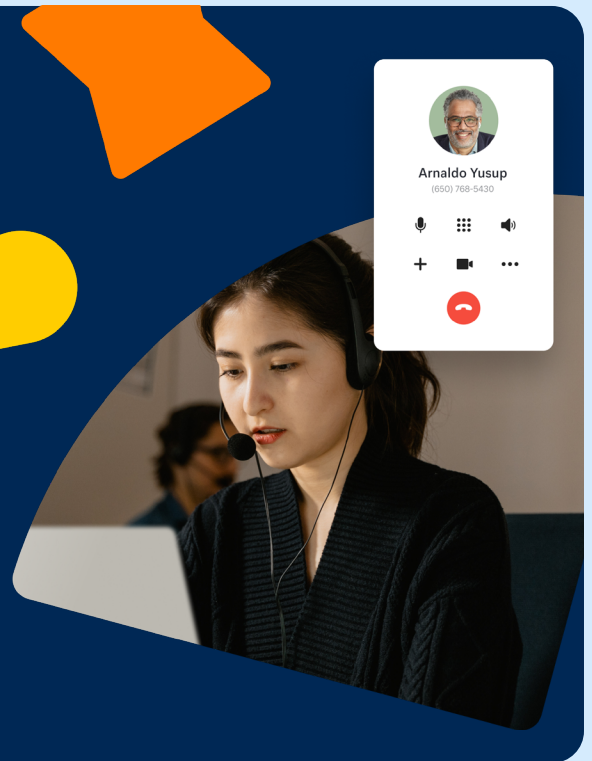
1. Video conferencing meetings

Although you won't have physical contact with your remote workers, tools like video conferencing allow you to keep agents connected and informed.

Using video calls for remote team meetings allows your agents to meet each other, an important element to building relationships with coworkers. This technology gives each virtual agent a face, strengthening the connections they make with their team members. Holding video meetings also ensures your employees hear the information you're sharing and encourages employee engagement.

2. Strong company culture

Successful managers put time and energy into creating a positive company culture for their agents. Remote agents are physically removed from both coworkers and the call center, which can create a disconnect with the company as a whole.

When building your company culture, emphasize your core values. Outline your expectations for your call center operations, even for remote customer service agents. Show agents how you expect them to treat customers and what to do when a call escalates. Give your team a solid understanding of how they should reflect the company, both at and outside of work. Your company culture should also emphasize the value each agent brings to your call center. You want remote workers to feel like important members of the team, so develop and maintain an environment that encourages loyalty and engagement.

3. Remote agent management tools

Like typical performance management, remote management is based on the data and metrics you gain from your call center software. If you see a dip in customer satisfaction, for example, you can use relevant information to identify your call center's strengths and weaknesses.

When evaluating your call center and team, the ability to view agent activity and call data is an invaluable asset. You can use call logs to determine the number of calls they take and the length of each interaction. Using this information, you can then see how their

performance measures against your standards. If you see a particular area that needs improvement, you can then focus on training efforts for improved agent optimization.
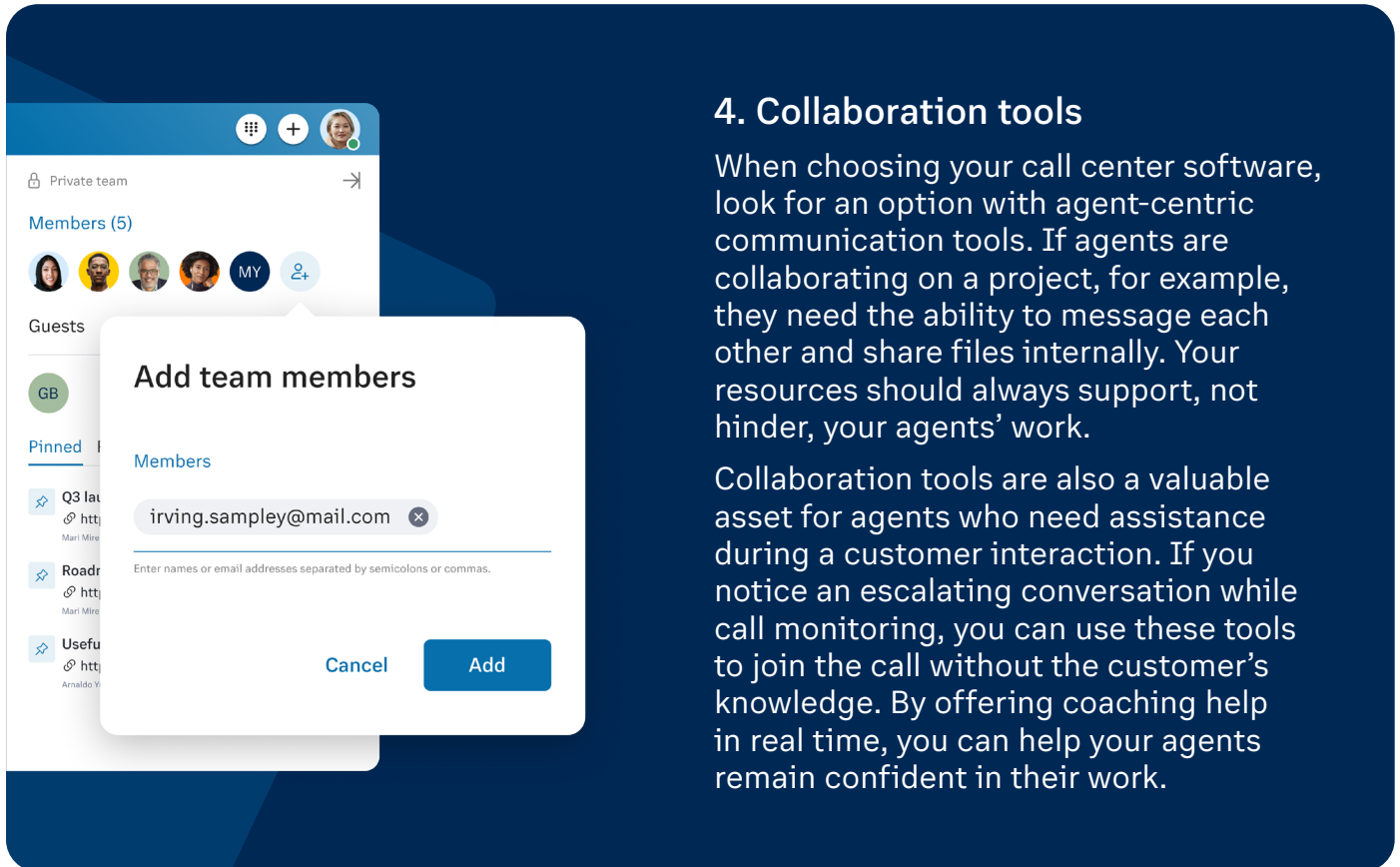
4. Collaboration tools

When choosing your call center software, look for an option with agent-centric communication tools. If agents are collaborating on a project, for example, they need the ability to message each other and share files internally. Your resources should always support, not hinder, your agents' work.

Collaboration tools are also a valuable asset for agents who need assistance during a customer interaction. If you notice an escalating conversation while call monitoring, you can use these tools to join the call without the customer's knowledge. By offering coaching help in real time, you can help your agents remain confident in their work.

5. Customer service gamification

Everyone loves to play and win games, which is why workplace gamification is so effective at promoting productivity and improving results. This technique uses rewards and recognition as "prizes" for employees who achieve the highest results in your call center, appealing to each agent's competitive side as they work.

When gamifying your customer service, you can motivate your agents to increase the number and quality of their customer interactions. Agents are pushed to do better in their work, which then increases the quality and results of your customer support as a whole.

6. Detailed training program

Building the best team of remote call center agents starts with the hiring and training process. When looking for new candidates to fill open agent positions, have a defined list of the skills and qualities you're looking for. Use pre-hire assessments, face-to-face interviews either in-person or over video calls, and targeted interview questions to find the best agents available.

When hiring remotely, it is critical to have an effective training program. These agents may never have the benefit of working alongside a more experienced agent, so you need to offer resources that provide the same level of knowledge and proficiency.

You need your new hires to be both amazing agents and effective remote workers. As you train them in customer service, be sure to prepare them for the requirements of working from home. Cover the policies and expectations you have of agents during their shifts, in their workspaces, and of their participation in team efforts. Optimize every part of your call center training to improve your agent retention and customer service results.

7. Customer service quality

While you might be happy with the number of calls your agents are able to make and take, these numbers are useless if your customers aren't happy with your service. Quality monitoring allows you to ensure your call center is succeeding on all fronts, providing value to your company.

**Use your quality assurance tools**

1. Use speech analytics to determine customer satisfaction during support calls.

2. Audit your calls to ensure agents are following call center best practices.

3. View data on first-contact resolutions to determine if your agents are providing adequate support.

Utilize a hands-on approach to management

1. Proactively manage and monitor all of your agents.

2. Take action if you notice an agent struggling with their work.

Manage call center compliance

1. Evaluate the processes your agents use to manage sensitive data.

2. Check your call logs to see if you've followed DNC list rules.

3. Protect your call center and company from potential future fines and litigation by monitoring calls.
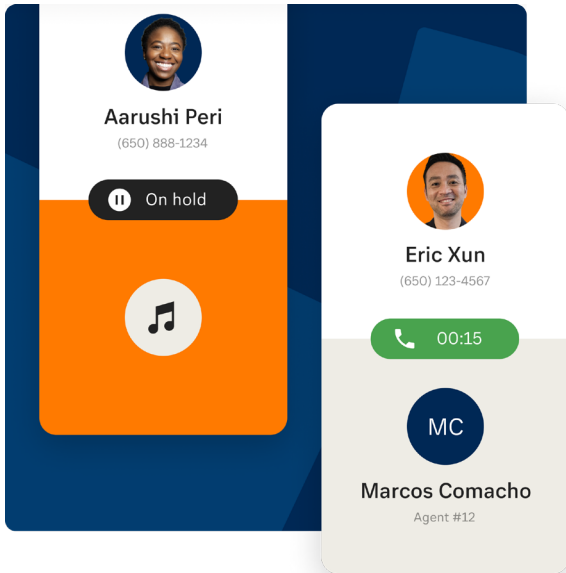
Micromanaging can damage workplace satisfaction, so use call recordings and past interactions to gather the information you need rather than hanging them over agents' shoulders.

If you need to take a more proactive approach, however, don't be afraid to use whisper coaching and silent listening to guide agents through calls. Your call center tools and the ways you use them can make all the difference between guidance and overbearance.

8. Call center and customer service feedback

The best way to learn is always to listen. As you implement and manage your remote call center operations, gather feedback to discover the areas that need the most work. Gathering feedback is only effective when you keep an open mind, so be willing to hear hard truths and different opinions.

Listen to your customers

- Utilize satisfaction surveys to invite comments from customers.

- Allow customers to rate their experiences and give recommendations for improvements.

Communicate with your agents

- Ask your agents about your policies and procedures to learn what is and isn't working.

- Give employees the opportunity to make suggestions.

The virtual contact center starter kit

Your remote contact center starts with your agents. Since you aren't limited by geographical constraints, you can hire local employees or use a globally distributed team. The resources you'll need include internet connectivity, a marketing software solution, conferencing tools, and any hardware your agents need to connect.

While some of these tools are high-end, more costly options, there are many tools designed for small businesses and budgets. As you build your virtual call center toolkit, work with providers to design the solution that best meets your customer service and budget requirements.

What equipment do agents need when working remotely?

Your customer service now relies on team collaboration, so you need to equip your agents with resources that allow them to reliably connect with coworkers and customers from their homes.

Internet service

Working remotely relies heavily on your agent's internet connection and speed. When setting your agents up, test their network's performance and speed. If the results aren't ideal, consider paying to upgrade their service. While it might not matter which IP address they use, you don't want to limit productivity with poor connections.

Computers and mobile devices

Agents can use either company-issued or personal devices in their home offices. Your platform will work with any laptops, desktops, and mobile devices that meet software, video, and audio requirements. If you need your agents to participate in video meetings, for example, make sure they have video streaming devices that meet your needs.

Phones and headsets

Most people don't have the hardware they need to make and take customer service calls at home. As you build your remote center, provide your agents with microphone-enabled headsets that work with their computers and/or phone systems. Some companies allow agents to use physical phones when working remotely, but you can also provide built-in softphones to improve agent efficiency and call quality.

Essential virtual call center software features

To achieve virtual contact center success, these are the top capabilities your solution must include.


1. Easy implementation

Whether you're starting your remote contact center from scratch or transitioning to a virtual setup, you need to be up and running as fast as possible. Virtual contact centers eliminate the need for physical setups, but you also need an option that can go live in just minutes. Look for a provider that offers active guidance during the implementation process to save time and avoid downtime for your agents and customers.

2. Collaborative support

When your agents work exclusively through your system, you need a tool that supports easy collaboration. Your solution should offer live chat for internal communication and video conferencing capabilities for more formal meetings. If your team will offer both private and public discussions, such as webinars, look for these capabilities as well. Additional collaboration features include cloud storage, file shares, screens sharing, image management, and the ability to collaborate with the entire organization.

3. Workforce management

Your managers won't be able to physically monitor your agents' work and productivity, so empower their success with workforce and agent management tools.
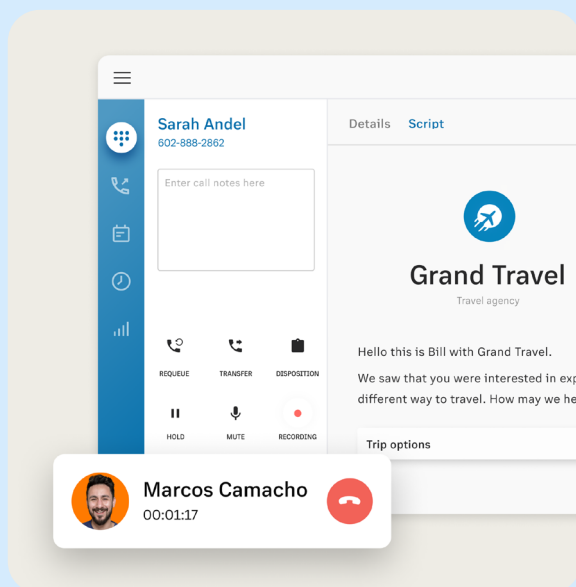
Your supervisors should be able to use your solution to view data for every inbound and outbound call. With the ability to access real-time analytics for each agent, they can identify potential weaknesses that can damage your customer service.

Workforce management tools also help your managers with scheduling tasks. Effective scheduling can help you avoid agent burnout, so give your managers a solution that optimizes their decisions.

4. Flexibility and scalability

A virtual contact center eliminates the typical constraints you might experience with a physical operation. To maintain this flexibility, you need a contact center platform that allows you to build custom solutions for your specific needs. Look for software that allows you to adjust the size of your workforce with ease and speed. You won't need to sit on unused chairs or equipment during the off-season. Instead, you can design a solution that fits your budget and call volume at all times.

Are you available for a call?

Martin Smith
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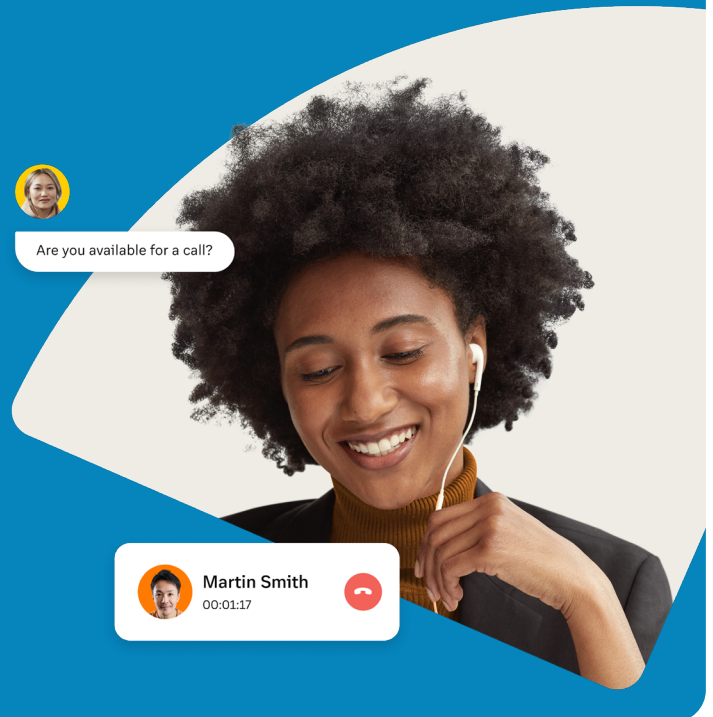
5. Reliable security

Virtual contact centers operate completely in the cloud, so powerful data protection is absolutely critical to your customer service. When your agents input personal customer information or your customers submit sensitive data through your system, you need to know that this information will remain secure. When considering a software option, evaluate the security features and tools the provider offers. If a software's security fails, after all, your customers and business will be most at risk.

6. Disaster recovery

When comparing cloud-based and on-premises contact center solutions, disaster recovery is one of the greatest potential benefits. If your business's office location experiences an emergency, such as a natural disaster or power outage, your platform should keep your contact center running without interruption. If your software solution has adequate security, you can also protect your call center from any security breaches that affect the rest of the business. Many software providers offer nearly perfect uptime guarantees, so look for a solution that is known for its reliability.

7. IVR systems

There are already many demands on your agents' time, so streamline the call process with an interactive voice response (IVR) system. When customers call, they'll be routed through a series of automated questions that connect them to the right agent and department. For frequently asked questions, such as queries about office hours and simple billing info, customers can get their answers without talking to a live agent and wasting time. IVR systems also improve the customer experience by sending them to the agent best-equipped to resolve their problems.
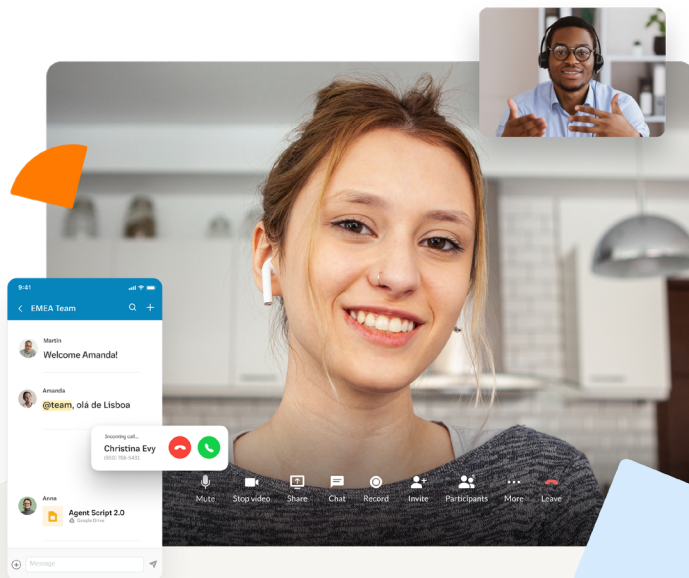
8. Coaching tools

These tools are especially important when working with a remote team. If you notice a call escalating, for example, you can use a whisper coaching tool to guide your agent through the interaction. If the customer remains unsatisfied, a call barging tool allows you to take over the call when necessary. Coaching and call monitoring tools are invaluable to your training and quality assurance processes, helping your managers guide agents to their greatest potential.

9. Analytics and reporting tools

In our digital world, data analysis is a must for customer success and support. The ideal contact center solution should offer access to in-depth metrics that you can use to measure and improve your customer service. Look for a platform that offers real-time and historical data on calls, interactions, service levels, queues, and more.

Your software should also offer numerous options for reports on your contact center metrics. Rather than spending hours downloading and charting the data yourself, you can get a comprehensive understanding with just a few clicks. When presenting data at stakeholder meetings, this feature is a valuable resource that you can use to demonstrate growth and success.

Call center software integrations

No contact center platform can offer every feature you need, so it's vital to select an option that offers an open platform and seamless integrations with the tools you already rely on. With these integrations, you can eliminate the need to find new alternatives to the processes you have in place. Your agents will also be able to get to work faster and more effectively on your new solution. Best of all, many integrations are either free or available for a low cost, helping you maintain great service within your budget needs.
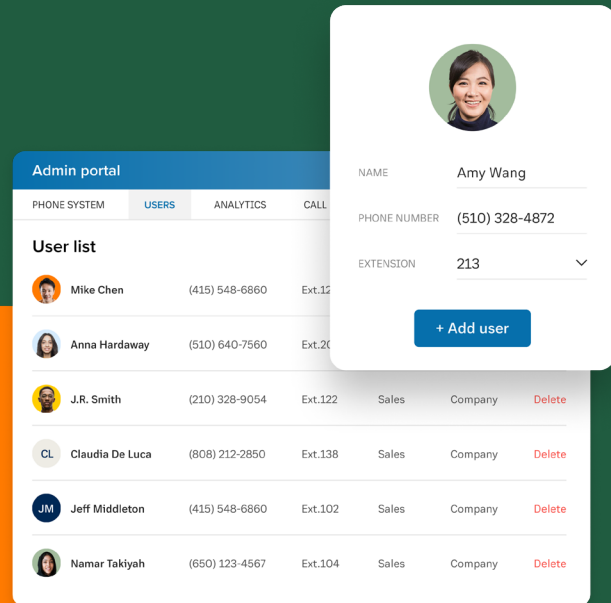
1. CRM integrations

For a call center, no marketing tool is more important than your customer relationship management (CRM) system. This integration gathers and records customer data with every interaction, building a comprehensive history that your agents can use to more effectively understand their needs and personalize their service.

When a customer connects with your contact center, for example, your CRM shows a pop-up that offers their data, relevant social media, and details about previous interactions with the company. This instant information allows your agent to quickly meet the customer's needs without re-asking questions about their account.

Though you can use a CRM system that isn't connected to your call center platform, this often frustrates agents and lengthens customer interactions. Your agents will have to jump back and forth between tools, disrupting their service and affecting their customer support. Instead, put their needs first with a built-in integration.

2. Work management apps

Like CRM integrations, work management app integrations limit the number of programs your agents have to use during the workday. If your company uses an app such as Asana, Trello, or Slack to manage your projects and assignments, you can use this integration to further streamline your work.

3. Industry-specific tools

Along with popular third-party integrations, your software should also have the ability to integrate with apps that are specific to your industry and business. While some integrations are universal to customer service operations, your business or industry may use lesser-known applications to support your work.

If you want to integrate these specialized tools with your call center solution, the software you choose should offer open APIs that allow you to customize your solution's features. If you have a software developer on staff, they can give you the freedom to manually build these apps into your platform. If not, however, look for an option that offers numerous out-of-the-box integrations. While you can still customize your software features, this eliminates the need for extensive coding knowledge without limiting your capabilities.

4. Customer service features

Even though there are numerous call center platforms that offer many of the features on this list, you may not be able to find an option that checks every box. If you are struggling to find the perfect balance for

your solution, look for a platform with integration capabilities that can help you fill the gaps.

If, for instance, you run a small operation that doesn't have the budget or need for an extensive omnichannel solution, consider supplementing your call capabilities with a live chat integration for your website. When your CRM system strains your budget, see if you can find a free or low-cost alternative that easily integrates with the platform you use.

Many contact center solutions offer incredible flexibility and customization abilities, so choose the option that will support your every need.

Examples of virtual call centers doing it right

Still unsure about the benefits of moving your customer service to a virtual contact center? These four businesses introduced RingCentral's omnichannel contact center platform to their operations, using cloud computing, unified communications, and flexibility to boost their capabilities and results. Read their customer stories to see how our solution can benefit your business as well.

Carvana

Carvana connects customers with used cars through their website, replacing the traditional dealership experience. Once purchased, customers can choose to have cars delivered to their homes by External Advocates. Before using RingCentral, buyers communicated with their External Advocate by calling their cell phones directly. If customers had a question that wasn't delivery-related, however, most would still contact the External Advocate, who often didn't have an answer for them.

Why choose RingCentral Contact Center™?
To fix this disconnect and improve access to customer service, Carvana decided to transition to a RingCentral contact center platform. Carvana was able to eliminate the post-delivery calls to External Advocates and send customers to a virtual agent who could offer a solution. They now use intelligent call routing to connect callers with the agent who can serve them best, using an interactive voice response (IVR) system to gather customer information and streamline the process.

As Carvana's market quadrupled over the next year and a half, their contact center easily scaled to keep up with their growth, another critical feature. Call analytics and historical reporting help them understand their results and make targeted improvements.

Carvana works to have a minimal on-premises footprint, using SaaS solutions as much as they can. With RingCentral Contact Center, they have created a virtual contact center that helps them meet that goal daily.

Brightway Insurance

As one of the largest privately held independent personal lines insurance agencies, Brightway Insurance manages a large volume of customer interactions. To keep with their rapid growth, they needed to expand their customer service operations, which they anticipated would include building a new on-site contact center.

Though they initially planned to add new functionality to their existing solution, Brightway decided that replacing the platform was the better option. They deployed RingCentral's solutions and immediately began seeing results.

Increasing efficiency, improving results

Their new analytics capabilities showed the company that they didn't need more agents, as assumed, but instead needed to improve their call routing. Many calls involved region-specific questions that could only be answered by specific agents. Their new insights allowed them to hire expert agents who handled these calls, improving handle times and increasing customer satisfaction.

This increased visibility also showed Brightway that they didn't need to build a new contact center and instead could use remote teams to improve support. With solutions like the RingCentral team messaging app, they can now keep their remote employees connected as they work from home through their virtual contact center. Though their agents are geographically distant, the collaboration tools offered on RingCentral Contact Center keep them connected as a strong and effective team.

About RingCentral

RingCentral, Inc. (NYSE: RNG) is a leading provider of business cloud communications and contact center solutions based on its powerful Message Video Phone™ (MVP™) global platform. More flexible and cost effective than legacy on-premises PBX and video conferencing systems that it replaces, RingCentral empowers modern mobile and distributed workforces to communicate, collaborate, and connect via any mode, any device, and any location. RingCentral offers three key products in its portfolio including RingCentral MVP™, a unified communications as a service (UCaaS) platform including team messaging, video meetings, and a cloud phone system; RingCentral Video®, the company's video meetings solution with team messaging that enables Smart Video Meetings™; and RingCentral cloud Contact Center solutions. RingCentral's open platform integrates with leading third-party business applications and enables customers to easily customize business workflows. RingCentral is headquartered in Belmont, California, and has offices around the world.

For more information, pleasecontact a sales representative.
Visit ringcentral.com or call 855-774-2510.