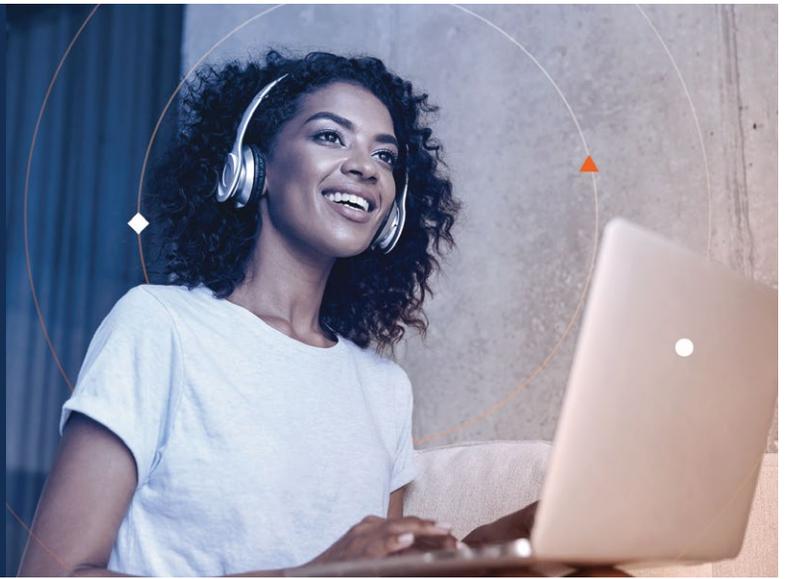




# How to Successfully Manage your Remote Agents



## Introduction

Around the world, remote work has become the new normal and it's unclear how long the transition will last. For many managers and agents, this is uncharted territory. This checklist is designed to help contact center leaders and supervisors successfully navigate this transition, so they can continue to effectively manage and empower their agents.

### 1 Ensure agents have the tools they need

**Making sure your agents have the necessary equipment and connectivity to perform their job is the first and most important step.**

- Essential equipment should typically include a webcam-enabled desktop or laptop computer and a headset, although in certain scenarios a **mobile device can serve** as a short term solution.
- Make sure that your technology infrastructure can **deliver optimal voice quality**, minimizing jitter and latency.
- Ensure that agents have installed a recommended browser, up-to-date antivirus software and any necessary desktop applications if they aren't using a company-issued computer.

### 2 Establish remote work policies and security best practices

**When your team is working remotely, it's important to create and clearly communicate new policies, operating procedures and remote security guidelines.**

- Create a telecommute policy and procedures document that outlines company requirements related to equipment, technology, human resources, legal and safety.
- Educate your agents on remote security best practices and if possible, use a learning management system to test their knowledge.
- Be transparent about how you plan to monitor productivity and performance.
- Invest in a **modern workforce management system** that makes it easy for agents to understand their schedules and supervisors to track adherence.
- Openly address any privacy concerns so agents feel comfortable in their new work environment.
- Establish clear policies related to the handling of all customer data and invest in contact center technology that can help keep protected personal information secure.

### 3 Streamline onboarding, training and coaching

Without the ability to connect face-to-face, you'll need a combination of technology and engagement strategies in order to effectively onboard new agents and develop your workforce.

- Arm your agents with the information and resources they need to succeed by developing and maintaining an **accessible, highly-organized knowledge base**.
- Help agents develop new skills with a **dedicated learning management system** and find ways to personalize their learning experience based on strengths and weaknesses.
- Proactively monitor your agents' performance using live reporting dashboards, call and screen recording, speech analytics, quality management tools and call barging.
- Build a culture of continuous learning that's reinforced through gamification and social recognition.

### 4 Leverage technology to meet new business demands

Consider new strategies enabled by **cloud-based technology** that can help keep operations running smoothly and reduce costs, while maintaining an exceptional customer experience.

- Deploy an **omnichannel strategy** to enable customers to connect via the channels they prefer and help agents resolve interactions more efficiently.
- Prioritize self-service options like chatbots, virtual agents and knowledge bases that empower customers to quickly address simple issues and inquiries without speaking to a live agent.
- Consider **AI-driven virtual assistants** that can help improve agent productivity and drive better outcomes for customers.

- Proactively notify customers of important information or changes to reduce the volume of inbound inquiries.
- Refine IVR scripts** to update customers on your most current wait times, business hours and disclaimers.
- Use IVR data dips to help customers resolve simple inquiries without leaving the IVR and reduce average handle time (AHT) for live agent interactions.
- Establish a plan using callbacks and voicemails to avoid missing customer interactions during unexpected spikes in call volumes.

### 5 Make the best of a remote situation

All work-from-home scenarios are not created equal. Be flexible with your team's diverse situations and do your best to keep morale high.

- Lead with empathy regarding your agent's remote work environment.
- Create opportunities for (optional) remote team-building activities.
- Conduct regular check-ins with agents to ensure they have the tools they need to support customers and themselves.
- Encourage agents to take regularly scheduled breaks and stress the importance of managing work-life balance.
- Regularly check-in with other leaders and supervisors to discuss best practices and new strategies in order to continue refining your approach to remote work management.

Talkdesk® is the cloud contact center for the customer-obsessed. Combining enterprise performance with consumer simplicity, Talkdesk easily adapts to the evolving needs of support and sales teams and their end-customers, resulting in higher customer satisfaction, productivity and cost savings. Over 1,800 innovative companies around the world, including IBM, Acxiom, 2U, Trivago and Peloton, rely on Talkdesk to make customer experience their competitive advantage. Learn more and request a demo at [www.talkdesk.com](http://www.talkdesk.com).