



# Building Blocks for a Solid At-Home Agent Program

*How to build and scale an at-home program with a firm foundation*

August 2009

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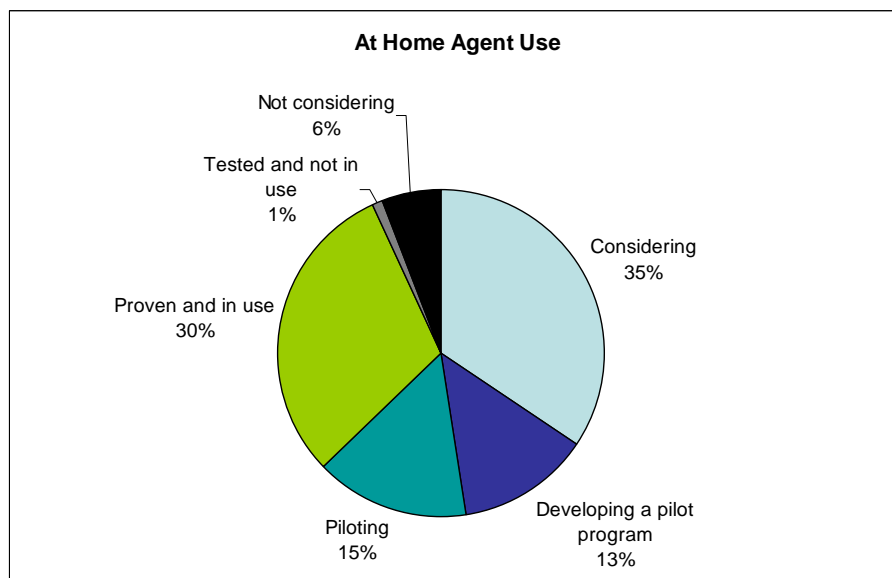
*Although many executives have considered implementing at-home agent programs, serious concerns remain. Can remote agents remain connected to your offerings and their team while outside the center walls? How will they be managed? How will they be trained? How will they be coached? The following white paper answers some of these questions and outlines a framework for those expanding their workforce beyond the brick and mortar enterprise.*

#### *The Challenges At Home*

At-home agent initiatives have been a red-hot topic of conversation for years, but the execution of such programs on a large scale has proved daunting. There have been countless pilots conducted – but the results have led to questions about how to scale these types of initiatives.

In an effort to answer some of these questions, Knowlagent recently conducted a survey of more than 200 call center executives across a wide range of industries.

Of those polled, some 30 percent said they are currently using at-home agents in their business and another 35 percent said they were considering it. Another 28 percent were either piloting at-home programs or in the process of developing a pilot program.



Most executives polled were not looking to replace their brick and mortar business, but expand it with the use of at-home agents. Overwhelmingly, the biggest drivers for considering a remote initiative were flexibility (26 percent) and cost savings (46 percent).



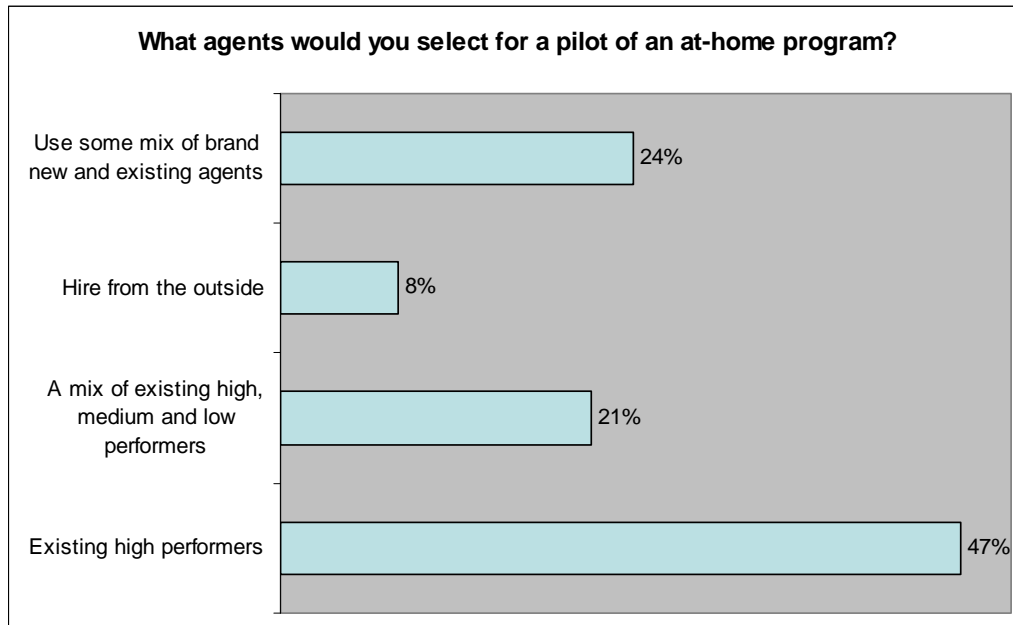
“Current brick and mortar agents are generally full-time agents who are very rigid in their scheduling and are often not really meeting their true efficiency because of that,” said Krystal Sautter, CEO of *Moving Beyond the Bricks*, a consulting firm specializing in home-based workforce implementations. “At-home agents are more flexible. The employees themselves want more flexibility, and it benefits the company because they are better able to meet the customers’ needs.”

Common challenges with mature at-home programs range from managing remote agents to coaching agents virtually, and ongoing training.

Typically, companies involved in at-home pilots or those trying to grow beyond them take their best agents and spread them in a set radius from the physical call center. But as they try to scale the program, they move beyond existing agents and often hire agents who have never worked in the center before and don’t have the same ‘safety net’ of floor experience.

Techniques used in brick and mortar centers – such as walking the aisles, ad hoc team meetings and huddles, classroom training, drive-by coaching, and raising your hand or asking a neighbor for help – don’t scale with a remote workforce.

Another challenge is selecting which agents will work from home. Survey results suggest companies are hedging their bets by avoiding the unknown. More than 60 percent of those polled in our survey said they would leverage existing agents in an at-



home pilot or program. Some 47 percent said they would select existing high performers. Another 24 percent said they would use a mix of new and existing agents and 21 percent said they would use a mix of existing high, medium and low performers. Only 8 percent said they would use newly-hired agents from the outside in such a pilot.



## Getting Started

When evaluating whether or not an at-home agent workforce is right for your business, there are many things to consider.

“First, you have to determine if a work-at-home program is even feasible for your organization,” said Sautter, who designed and implemented the at-home program at ConAgra Foods. “Then consider all of the potential costs from office furnishings to supplies, technology, a customer satisfaction and workforce management tool, training, tech support, and any other elements needed to sustain an at-home program.”

### Calculate Expected ROI

Calculate the expected return on your investment before you get started. First, understand your objective for deploying an at-home program. Do you need more space in your existing facility? Is it to increase employee loyalty and retention? Is it purely to reduce costs? Is it to mitigate risk?

Clearly identify the big-picture value of how the program will impact the company and the bottom line. Lay out the costs and benefits of the program and compare those costs to an outsourced and off-shore model.



### Build a Project Team

Choose a cross-functional project team with representation from HR, IT, finance, legal, procurement and the call center. Include an executive champion of the program that not only fully supports the mission, but also has a clear understanding of the expectations and time commitment.

### To Pilot or Not?

There have been enough successful implementations to prove the concept and overall success of work-at-home programs. But if you need to test the model on a small scale to prove the benefits and expected returns, pilots can be beneficial to validate the increased productivity and prove to reluctant stakeholders that employees really can be trusted to work from home.

### Transition

Optimally, a program would roll out in phases to allow you to validate assumptions and lower the perceived risk. If moving existing agents home, truly validate your assumptions by addressing the validity and reliability of the initial phase. If you have 100 agents, for example, sending just 3-4 agents home as a pilot could be detrimental to the initiative. What happens to this small sample if even a few of these agents realize they don't like working at home and prefer the interaction of being in an office?

“The most successful implementations I have seen built that first phase of implementation with 20-25 percent of their proposed workforce and with a cross-section of performers,” said Sautter. “And once agents have been transitioned, allow enough time to move past the honeymoon phase. This usually takes three to four



months, but depends on your business cycle and the peaks and valleys of your business.”

Once the waters have been tested with a first phase or pilot, and the ROI assumptions validated, the next hurdle is scalability.

### *Keys to Scaling*

Once companies have implemented an at-home workforce in a pilot or initial phase, they are challenged to scale the program. When the time comes to ramp up, processes must be solidified around some of the biggest challenges to mature programs, including who to hire or transition, how to keep these agents connected to the business and how to effectively manage agents remotely.

### **Selecting the Right Agents**

Working from home is very different than working at an office. As in a bricks and mortar center, it is critical to select the right agents by not only assessing their ability to do the job, but also their ability to fit into your company’s culture and work independently. Additionally, qualities such as resourcefulness, strong problem-solving and being a self-starter have been shown to increase an agent’s ability to work independently.

If you operate a geographically dispersed remote program, you may never meet new candidates. In this case, an assessment tool can be invaluable to helping you hire the right agents for the job.

“Your hiring process is critical to your retention efforts and overall performance,” said Sautter. “Building a competency model based specifically on your culture, the business needs, and the unique role that agents play will increase the probability of hiring the right person.”

A good screening process includes not only assessments that help identify key traits and skills in potential agents, but also enables candidates to assess the job fit for themselves. Many applicants may not be cut out for working at home or, for that matter, any kind of call center work.

### **Keeping Agents Connected**

When dealing with a remote workforce, the relationship between employees and managers is critical. If virtual agents don’t feel supported, they will disengage which is bad for the company and your customers.



“I have found that the team leading your remote workforce must figure out the level of interaction necessary based on each employee’s unique need,” said Sautter. “How you coach them will definitely affect their loyalty.”

Managing this level of remote interaction can be overwhelming to supervisors without a framework built to support the supervisor-agent connection. By providing both agents and supervisors with the process



and tools for consistent performance management and coaching, a net is created that makes sure none of your remote agents fall through.

### **Keeping Agents Informed**

Training remote agents is a continual challenge for many companies implementing a virtual workforce. Traditionally, in brick and mortar call centers, agents receive updates through chair drops, ad hoc team huddles, asking a neighboring co-worker or by raising their hand to the floor walker. These types of techniques cannot be leveraged when centers need to provide information to remote agents



In addition, traditional classroom training is often not feasible with the virtual workforce on an ongoing basis. Even when agents live within driving distance of a center, the frequency of the needs to update and train agents is greater than the logistics of classroom training will allow.

Training and updates in the call center are very collaborative. When agents in a center leave a training session, they turn to their coworkers and supervisors with questions to reinforce what they have learned. With at-home agents, this support system isn't there. As a result, training must be more deliberate, more consistent and more measured.

Many companies have found that a blended approach works well. Typically classroom (physical or virtual, depending on your model) is needed for larger initiatives. For the ongoing "nuggets" of information that are needed on a weekly basis, pushing to home desktops during dips in call volume is the most effective way to keep agents engaged without sacrificing service. Also, by providing daily tips and online updates to virtual agents, you can be sure these employees have access to the same information and best practices as those agents physically in the call center.

### *In Closing*

Today, there is a lot of interest in virtual workforces coupled with a lot of open questions and path-finding.

"The concept of working remotely, at least on a large scale, is still fairly new, so we will have to learn things along the way," said Sautter.

Where companies tend to struggle the most is with executing traditional management practices such as hiring, coaching and training at a distance. Some of the most successful programs are using brick and mortar best practices as a solid foundation and automating those processes for a virtual workforce. In this way they are taking advantage of the benefits of a new model using proven practices assisted by technology.



### **About Knowlagent**

Over 200,000 users around the world reduce labor costs with Knowlagent's agent management software every day. By automating traditional call center management processes, Knowlagent's on-demand solutions for training, coaching and hiring *reduce* spending attributed to off-phone activities while improving the key metrics that matter most to you. With Knowlagent, you can optimize frontline performance faster and more affordably than ever before. For more information on how you can spend less *and* get better with Knowlagent, call 888-566-9457 or visit us online at [www.knowlagent.com](http://www.knowlagent.com).