

# Business Continuity by Design

Many organizations are renewing their focus on business continuity and disaster planning. Preparing for unforeseen events such as a utility outage, a natural disaster or even a pandemic often require businesses to consider shifting their workforces to work from home (WFH). Those who have the infrastructure and practices to accommodate WFH employees have a big advantage by design. This white paper will cover how your organization can prepare for contact center employees to work from home by implementing the right technology and business practices to give your team an advantage, before and after a disaster hits.

Organizations large and small recognize the importance of preparing to react to unforeseen circumstances. For many organizations, annual IT budgets for business continuity funding are often determined and based on an organization's anticipated revenue loss, impact on their end customers, and damage to the corporate brand caused by downtime. Designing day-to-day operations around the unique challenges that outages and natural disasters present is a difficult task for management. Preparing for these circumstances often requires organizations to shift their workforces to work from home, especially in the cases of departments and teams that are critical to business operations. Few business functions are as critical as the contact center, which serves as the face of the organization and the primary method by which customers can directly communicate with the business.

Many companies have begun to shift portions of their contact center workforces to work from home to attract new talent and give their employees the flexibility and "perk" of working from home as part of their top performer and employee retention programs. By doing so, these organizations have given themselves an advantage if an outage or disaster strikes, because they have enabled their

staff to maintain critical business functions from the safety of their own homes. Organizations who have not yet put work from home practices into place are now finding it necessary to rapidly shift some or all their employees to work from home, and in some cases might be unprepared. This paper will explore key considerations and best practices to help you prepare employees to work from home.

## **The Business Case for Disaster Recovery and Business Continuity Planning**

Disruptions to business can have a big impact on an organization's customers, employees, brand reputation, and bottom line. Customers depend upon the companies they do business with, especially in the event of a disaster. Maintaining critical communication channels with customers and continuing to earn their loyalty, especially during a crisis, can further solidify lifetime customers. Failure to maintain key inbound and outbound communication channels with customers in the event of a disaster can have a very negative impact on an organization, both short and long-term. While preparing for natural disasters such as snowstorms, hurricanes, and pandemics is often top-of-mind as businesses develop their disaster recovery and business continuity plans, it's also important to consider the impact of lesser events such as power or

internet outages. In any of these events, companies should strive to preserve critical contact center functionality in order to:

- Maintain customer satisfaction and loyalty
- Retain at-risk customers and prevent negative customer experiences
- Support customers when they need it most
- Maintain revenue sources, which may be even more critical during a disaster
- Continue accounts receivables / cash collections flow

### **Preparing the Contact Center for a Disaster or Outage**

The first step of preparing the contact center for a disaster or outage is to ensure that its technology can be accessed in these circumstances. Recovery systems should be established in a separate physical location from primary systems, and IT staff should regularly test failover between the two systems. Cloud contact center software that is deployed in the public or private cloud has several built-in disaster recovery advantages, such as being deployed in multiple availability zones or data centers. In the event of a disaster or outage that affects the primary system, calls will not be dropped and the failover to the secondary system will occur quickly, minimizing the impact on customers. Regardless of how software is deployed, it is imperative that both primary and backup systems have the availability to support the needs of the contact center and can scale to meet additional demand in the event of an emergency.

Once a disaster or outage occurs, businesses need to make rapid adjustments to ensure that contact center staff can resume servicing their customers as quickly as possible. In some cases, organizations establish a secondary physical location where agents can relocate to and continue to work. Secondary physical locations should always be equipped with necessary hardware, software, and other resources to ensure that agents and management can continue to function normally. However, this option is costly, and many organizations opt instead to prepare their staff to work from home.

Preparing home agents and management staff to access critical information and software from home requires most companies to create a Citrix environment or VPN. This helps organizations keep sensitive information including customer Personally Identifiable Information (PII) data secure. Establishing additional security protocols such as preventing agents from forwarding attachments to their personal emails and creating rules about what information can be printed are also necessary to keep sensitive information safe.

Employees that typically work on-site may not be familiar with accessing software remotely, so it is important to regularly provide training on how to utilize the Citrix environment or VPN. Software in the cloud that can be accessed through a web browser presents the ideal scenario for IT departments that are shifting employees to work from home. In this case, little to no additional configuration is needed to ensure that the software can be accessed from home.

### **Technology and Equipment for Home Workers**

Contact center employees over multiple shifts often share hardware such as PCs which makes shifting to a home workforce more challenging. Whenever possible, it is best to provide laptops to employees so that they can be mobile and shift to work from home in the event of a disaster or outage. It is also important to ensure that employees are prepared to work in a quiet location with minimal distractions to maximize productivity and minimize any negative impacts on customer interactions. This location needs to be equipped with office supplies and any other equipment that employees may need to do their jobs. Creating a clear policy on reimbursement for



home equipment or allowing employees to prepare home offices with a reasonable amount of supplies in advance helps ease the transition to working from home.

Access to high-speed internet is a critical component of shifting contact center employees to working from home. Ensuring that employees can continue to interact with customers requires a strong connection without interruption, and sometimes wireless internet can be unreliable. Whenever possible, it is best to help agents connect to the internet with a wired connection directly to the modem or router.

Contact center agents that handle voice interactions also need to be able to establish a voice path with their contact center software. This can be accomplished through a VOIP SIP phone, a home phone or even a mobile phone. Additionally, agents and management need to be able to communicate with each other remotely through the phones or instant messaging platforms. Since managers and supervisors cannot communicate with agents in person, ensuring that teams can keep in touch remotely is needed to operate efficiently and effectively. This is especially important for workers who are more comfortable in an office environment, because it keeps collaboration high and the spirit of a team intact even when detached physically from one another.

### ***Home Workforce Technology and Equipment Checklist***

Preparing to shift agents to work at home in the event of an emergency or outage requires:

- High speed internet
- A company or private laptop or PC
- Easy remote access to software or browser-based software
- Full featured contact management and workforce optimization software
- Access to a landline, soft phone, or mobile phone
- An easy/convenient communication and collaboration tool like a mobile app for supervisors and teams

### **Employee Work from Home Expectations**

It is important that employees understand what is expected of them and what is not acceptable behavior while working from home. Outlining these expectations and communicating them in advance of an outage or disaster is a key step in preventing potential issues as employees shift to working from home. Some expectations to establish with home workers from the outset might include:

- Employees should be accessible during agreed working hours
- Employees need to provide uninterrupted customer interaction and should not be the primary caregiver for any dependents during working hours
- Minimize non-work-related calls, texts, social media, and visitors
- Minimize background noise
- Avoid any non-office approved substances (i.e. alcohol, medications, etc.)
- Avoid any non-office approved distractions such as television or radio

### **Readiness Training and Testing**

Holding regular training sessions with employees to prepare for a disaster or outage helps organizations be more nimble in these scenarios and transition to working from home more easily. In addition to reviewing employee expectations while working from home, agents need to be familiar with how to access and download software, connect to a Citrix environment or VPNs, and what changes in procedures will result from transitioning to working from home. Employees should also be aware of any resources to help assist them transition to working at home such as how-to guides and training videos.

Some items to address in readiness training sessions include:

- Requirements/Qualifications to work from home, whether mandatory or optional
- Mutual expectations from company and agents, supervisors, and managers
- Review Work from Home Agreement
- Support channels
- Walkthrough of home office setup and how to access environment/VPN

- Delivery of information packet with steps for day one of remote work
- Discussion of timeline for how long this is expected to continue
- Field questions from agents in group environment

Employees should regularly test accessing corporate systems and software from home. This will help minimize disruptions if agents need to quickly shift to working from home and will reduce the burden on IT and support staff in these circumstances. During the first day employees are working from home, it is recommended to have a small group remote session at the start of the employees' shifts to ensure they are connected, able to access the network, can establish an audio path, and have any other needed resources at their disposal.

### **Configuring Alvaria Solutions for Home Workforces**

Alvaria solutions support remote employees working from any location, and no additional licenses are required to accommodate those working from home. Additionally, all management functions supported by Alvaria solutions can be accomplished remotely. The bullets below detail information specific to Alvaria Proactive Outreach:

- Supports home/remote agents working from any location
- Will work with any voice endpoint incl. PSTN (IP phone/mobile/landline)  
\*SIP phone req laptop/PC
- No desktop software required
- No additional license required
- Full real-time and historical reporting is available
- All voice and digital channels supported
- Agents working on digital channels only do not require a voice endpoint
- Administrator functions or config through standard browser
- Alvaria Workforce™ available

### **Managing Increasing Contact Volumes Remotely**

#### ***Adjustments to Inbound and Outbound Strategies***

As queue times rise rapidly in the event of an outage or disaster, contact centers can utilize dynamic

routing capabilities to route customers to different pools of agents if the best qualified group of agents are overwhelmed. In some cases, it may make sense to offer callbacks to customers, but keep in mind that likely variations in average handle times during these scenarios will be high and it may be difficult to honor scheduled callback times. If contact volumes continue to rise, it may make sense to shift outbound agents to inbound queues. Another option is to slow the pace of outbound dialing to ensure that blended agents are focusing primarily on inbound interactions. If necessary, overflow volume that cannot be handled by the contact center can be re-routed to a business process outsourcer, or to a voicemail box as a last resort.

In the event of an outage or disaster, adjustments to escalation rules may be prudent. If there is a surge in demand for front-level supervisors and managers that cannot be accommodated, it may make sense to create a dedicated escalation queue. This will allow management to continue to focus on their core responsibilities when they are needed most.

#### ***In Queue Self-Service***

One option businesses can take to alleviate high call volumes is to offer in-queue self-service. Automated recordings can answer frequently asked questions and encourage customers to take advantage of faster self-service options when available, and even transfer directly to an IVR or intelligent assistant within the same interaction. By implementing in-queue self-service, many customers will not need to wait in long queues or connect with a live agent, improving both the efficiency of the contact center and customer connections.

#### ***Create Additional Self-Service Options***

As contact volumes and queue times surge, businesses should consider additional self-service options. By leveraging IVR or intelligent assistants (e.g., a chatbot or SMS bot), customers can get access to the information they need quickly, without waiting to connect to a live agent. While developing a complex self-service solution is likely not an option to quickly adapt to some emergencies, creating a basic bot or IVR to answer common and important questions is something that can be accomplished without significant time or resource commitments.



### **Be Proactive**

One of the most effective ways to reduce surging contact volumes is to anticipate the needs of customers and proactively communicate with them by sending guidance, notifications, or instructions on how to use self-service through their channels of choice. In fact, being proactive can reduce customer service calls by up to 30%! (**Mycustomer**) Being proactive in the event of a disaster may also help space out contact volumes. For example, some organizations that were impacted by the COVID-19 crisis used proactive communications to encourage customers to contact them at a later time/date if their service needs are not urgent and do not require immediate action.

### **Cultural Considerations for Home Workers**

The culture of an organization that supports work from home can be quite different from that of a traditional centralized contact center. When all front-line employees and management are collocated in an environment of the organization's design, supervisors know exactly what agents are doing by being on the floor, and communication of all sorts can occur face to face. A remote workforce requires more advanced workforce management tools and new processes to reinforce a culture that operates both in the interests of the agents and in the interests of the organization, including:

- Effective intra-day, real-time adherence and agent productivity monitoring
- Ad-hoc and regular scheduled communication between supervisor and agent using Slack, Skype, Microsoft Teams, or another communications tool
- Flexible scheduling rules with high priority for agent scheduling preferences ensuring that official schedules are as close to desired schedules as possible
- Automated notifications of important information such as approval of a requested schedule change or available voluntary time off
- Increased use of a workforce management mobile app to make scheduling and rescheduling available
- Keep home worker performance standards high by setting thresholds for team and individual agents, automatically identifying performance issues and recommending specific coaching actions

- Leverage gamification to reward standout performers and drive engagement with team challenges to encourage friendly competition between groups or individuals
- Increased percentage of quality recording observations to minimize risk of poor WFH quality
- Changes in service quality priorities often requires associated alterations to customized quality evaluation scorecard templates
- The increased use of speech analytics to broaden search categories for dissatisfaction, extended silences, and poor audio connection/quality



### **Fine Tuning Workforce Management for Work from Home**

When employees move from a centralized location to a distributed environment and the very culture of the organization is in flux, many of the existing WFM assumptions and parameters should be re-examined. Expectations for performance may be different as well. Consider these examples:

**Forecasts:** Many changes for working from home may affect the accuracy of contact forecasts; for example, new hours of operation, staffing changes, increased shrinkage, and new digital customer service channels being substituted for voice. Forecasting should be reviewed.

**Scheduling:** Scheduling will also be affected by the changes you are making to facilitate WFH. New shifts, extended coverage, flexible shift bidding, bidding frequency, and many other factors warrant a review of scheduling assumptions.

**Performance Monitoring:** With employees working primarily alone in their home offices, expectations for adherence and productivity will likely change as well. Adherence alarms, shrinkage analysis, super-state analysis, and many other existing performance reporting mechanisms will need to be adjusted to the new norms of performance.

## Advantages of a Home Workforce

### Flexibility

Allowing employees to work from home makes flexible workforce management scheduling options much more attractive because they can act on that flexibility. For example, if an agent can schedule a one-hour break at the end of the school day, he or she can run over to school and pick up the kids. It also removes geographic limitations, allowing agents to support a contact center from virtually anywhere. As stated earlier, quickly shifting to a home workforce may be necessary in the event of an emergency such as what we saw with COVID-19, and by enabling a remote workforce from the start, businesses are much better prepared to continue critical business functions if the unforeseen occurs.

Additional scheduling flexibility can be offered to agents by allowing them to call in sick, trade shifts, and bid for shifts from a mobile device. In many cases, requested changes can be approved automatically and immediately with artificial intelligence in the form of business rules, without any intervention from the supervisor or manager. By providing agents maximum flexibility in their schedules, contact centers ensure improved schedule adherence, productivity, and efficiency.

### Employee Satisfaction

Contact center employees have a high turnover rate, especially compared to other industries. Allowing work from home options significantly improves employee retention rates. Flexible work arrangements and hours empower the employee to take control over his or her schedule, thereby improving work-life balance—which may be important to Millennials, the dominant age group in the contact center. In fact, the retention rate for agents who work from home is

more than triple those who work on-site. (**At-Home Agents - A Model for the Future, Frost & Sullivan**).

### Lower Contact Center Costs

By shifting employees to work from home, contact centers do not need to maintain as much office space and can lower utility costs significantly. After initially training employees on-site, all training and work can be accomplished virtually. Since employees working from home are much less likely to quit, contact centers with remote workforces enjoy significantly lower training and recruiting costs as well.

### Improved Customer Experiences

It's been proven again and again that happy agents lead to happy customers, and higher employee satisfaction from home agents drives improved CSAT, customer retention and loyalty. Outsourcing is always an option for extra capacity, but agents who work from home deliver 20% improved CX scores and 34% higher FCR rates than offshore agents. (**Frost & Sullivan**). Additionally, on-site disruptions are likely to have a significantly smaller impact on customers when employees are dispersed across multiple physical locations. When on-site problems arise, remote employees can quickly fill in the gap, especially when they have flexible schedule arrangements.

### Alvaria Is Here to Help

Contact centers around the world are on the front line of customer service during unprecedented times. From product development to customer and technical support, Alvaria creates better experiences for people, all around. When unforeseen events occur and business continuity is your highest priority, you can rely on Alvaria to provide purpose-built technology that will empower your agents and help them deliver the best outcomes for your customers.

