

CHECKLIST: MANAGING WORK-FROM-HOME CONTACT CENTER AGENTS

Best practices and readiness guide
for success during emergencies or
normal business operations

Make experiences *flow*

About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

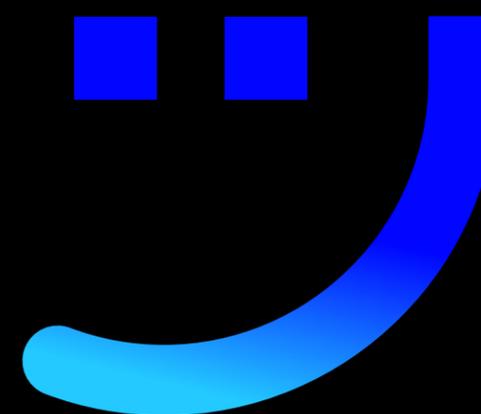


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INTRODUCTION

As your organization navigates potential emergency situations that force agents to work remotely, NICE CXone has your contact center technology needs covered. But having the software capabilities to route customer interactions to agents at home is only half of the preparation equation. Your contact center must also have a business continuity plan for other resources to make remote work a functional reality.

NICE CXone has prepared the following Remote Agent Checklist to help you prepare in the event your workforce is forced to work from home.

DEVICES, NETWORK AND CONNECTIVITY

Hardware

- Company issued computers**
 - Ensure contact center procures enough computers and chargers for all agents who will be working remotely.
 - Laptop computers are ideal, but if you don't have enough laptops, consider dusting off some of those old PC's in your contact center's storage. While they have a large footprint and not the ideal solution, remind agents this will only be for temporary period.
- Agent personal devices**
 - Ensure you have a mechanism to label and track the computers prior to distribution for asset control.

Network

- VPN/network access**
 - If agents require the ability to access other systems and tools accessed through your company's internal network, ensure that all computers have the ability to connect.

Desktop Support

- Logins**
 - Ensure your agents know their user name and password to log into CXone and other systems.
 - While agents use these tools every day agents may have forgotten their user name and password, especially if your contact center usually uses Single Sign On (SSO). avoid any hiccups on day-one at home, have all your agents reset their passwords if they have any doubts.

Internet support

Ensure that all agents have high enough internet speed at their homes to support the use of systems needed to support your business needs. Ask agents to run a speed test using whatever machine they will be using at home prior to full-time remote work.

- Hotspots: If your agents' internet speed is not sufficient, consider procuring hotspots they can use.
- Pay to increase their speed: If your agents' internet speed is not sufficient, consider reimbursing them for the difference in cost to increase their speed through their internet provider.
- Browsers: Ensure that all machines that agents will be using have the appropriate browsers downloaded. NICE CXone CXone is supported via various Internet Browsers, but the integrated soft phone is only formally supported via Chrome. Note: The unified interface with CXone Engagement Management (WEM) is only formally supported in Chrome.

Antivirus & recovery

Ensure both company and employee-provided computers have up-to-date antivirus software installed and processes in place to protect equipment from virus-related impact, as well as protect against malicious hijacking of information via malware.

- There is additional remote for organizations which enable remote users to use personal computer

Ability to re-image

Inquire if your organization has the ability to image/re-image company provided machines for remote agents. Ability to image/re-image can facilitate the rapid deployment of computer systems and helping to support remote workers.

Desktop virtualization

Companies wanting to maintain control remote employee applications may deploy applications using VDI.

- From a general DR/BCP plan, it is wise to consider how remote users will impact existing use of VDI.
- NOTE: NICE CXone recognizes this as a common practice, however we don't formally support VDI environments, nor is our Technical Support team able to diagnose, troubleshoot, or assist customers in enabling VDI for their remote users.

Voice Interaction Handling

Train agents on different mechanisms to route voice calls.

CXone soft phone

If your contact center does not typically use the CXone soft phone but will now be utilizing the free work-from-home module, ensure all your agents are trained before they start working remotely. It is very intuitive and easy to use, but best they practice handling a couple interactions while still on site.

Alternative B-leg

Ensure agents know how to use any 7-digit DID to act as their B-leg for handling voice interactions as back-up. Ideally agents will be using the CXone soft phone but having a PSTN home connection or personal cell phone are good options if required.

- If agents are required to use their personal phones for whatever reason, identify if and by what mechanism your agents should track that for company reimbursement at a later date.

Headsets

Ensure that all agents have functional headsets compatible for whatever company-provided or personal machine they will be using while working remotely. Have them test it with a peer to ensure they can be heard clearly and with good quality before they begin interacting with customers.

Workforce Planning

Verify employee information

Ensure your agents' contact information is accurate and updated in your HR management or other system. Have agents double check as soon as possible, including their emergency contact information. Once this information is verified, ensure that all managers and supervisors have an offline copy accessible to them without needing to connect to your network.

Access to workforce management and quality management tools

Set clear guidelines and expectations for your agents related to WFP activities, and ensure they can access any relevant workforce management and quality management software.

- If you are using a CXone Workforce Management this should help make things easier.
- However, if you don't and still rely on more traditional timecard methods, a process that can be executed from home via spreadsheet, email, etc. will be important

Internal Communication

Outline expectations and protocols for internal communication with your agents while they are remote.

- Emergency updates**
(ex. COVID-specific updates) Create a company-specific location where agents can get regular updates from your organization related to the emergency at hand. For example, FAQs, HR resources, and other frequently needed documents. Ensure all agents can access. Keep this updated daily while your contact center is in remote mode.

- Corporate email access** Ensure all agents can access their corporate email addresses. If they cannot because they are unable to access your network, explore potential other options.

- Antivirus & recovery** Outline expectations that you have for your agents on communicating with direct supervisors on a daily basis while working from home. For example, if they are expected to email or IM their manager when they begin working in the morning, etc. make those expectations clear.

- Daily communication** Inquire if your organization has the ability to image/re-image company provided machines for remote agents. Ability to image/re-image can facilitate the rapid deployment of computer systems and helping to support remote workers.

- Communicating illness** While you are sending your agents to work from home to prevent the spread of illness, there is still a chance that your agents will fall ill. Ensure they know who to call to inform them of illness.
 - Note: Work with your HR department to develop an effective mechanism to track and report all agents who fall ill, including the date their illness is reported, if they receive coronavirus testing, and the date they are done with quarantine. This will help monitor and mitigate any further organizational spread.

- Emergency employee communication** Your contact center may already have an emergency communication plan in place to communicate related to events, etc. If you do not, consider putting one in place, or just ensure that all supervisors have the most update contact information for all agents.
 - Contact center best practice is to leverage their IVR to execute outbound communications to agents related to emergencies. At minimum, you should have a manual phone tree in place.

Concerted agent engagement

While the first few days of remote work will be novel and perhaps enjoyable, after some time, you may begin to see the impacts of social distancing surface amongst your team. These will be challenging times for your employees, so create a concerted plan for agent engagement.

- You may need to consider loosen some metrics to help keep moral in line.
- Leverage gamification where possible.
- Consider contests that can be executed remotely. For example, different dress-up theme days in which agents send photos of themselves dressed up in that theme, have peers vote on the winner for the day, send small gift card, etc.

Technical support

Ensure agents have contact information for internal resources that can assist them if they have technical issues connecting to the required systems, your network, etc.

WORK-FROM-HOME BEST PRACTICES

These best practices seek to help agents establish a healthy work-life balance, promoting both individual productivity and the avoidance of work creep.

Work Space

- Dedicated workspace** Create a dedicated workspace.
 - Try to avoid working in your bedroom, if possible. This will help prevent work creep.
- Ergonomic readiness** Ensure agents inspect their home workspaces for ergonomic readiness.
 - An ergonomically correct work area will help prevent injury.

Time Management

- Work hours** Maintain your standard work hours as much as possible.
 - Communicate with your supervisor if personal issues arise and you need to adopt a temporary change to your schedule.
 - Note: Work with your HR department to understand any further guidelines that need to be communicated around this point if your agents are hourly employees (i.e. over-time concerns, labor union concerns, etc.)
- Check your schedule regularly** Ensure you are regularly checking your schedule.
 - Schedules may change quickly if your peers and their family members fall ill and schedule adjustments are inevitable.
 - Make sure you always know the most updated start time for the subsequent day before logging off in the evening.
 - If you are using CXone Workforce Management this should help make things easier. However, if you don't and still rely on more traditional schedule distribution methods, a process that can be executed from home via spreadsheet, email, etc. will be important.

- Breaks & lunches** Take all breaks and lunches as scheduled.
 - Note: Work with your HR department to understand any further guidelines that need to be communicated around this point if your agents are hourly employees

- Task prioritization** Keep a task list. There are a lot more distractions at home than in the office.

Peer & Customer Collaboration

- Customer transparency** If appropriate, let your customers know you are working remotely when interacting with them.
 - When schools and daycares close, it is difficult to keep noise from pets and children from occasionally being heard.
 - Customers will be very understanding during these times as long as they are informed.

- Video** Use video whenever possible. Seeing a friendly face is good for morale in long-term remote situations.

- Communicate often** Engage with your team. Don't let work from home isolate you.
 - Use Microsoft Teams or Skype or Slack to socialize appropriately. (Good Morning, how are you, etc.).

General Productivity Best Practices

- Routine** Follow your routine (set your alarm, get up on time, take a shower, grab coffee and breakfast, and prepare your lunch, just like you have to leave the house.)

- Physical activity** Exercise if possible, and at minimum get up at least once an hour to stretch and move.

- Set boundaries** Set boundaries with housemates, kids, significant other, etc. Let them know your working hours and ask them to be mindful

BACK OFFICE

Your non-agent workforce will also be impacted and forced to work remotely. CXone can help support those needs.

Non-agent Considerations

- Back office call routing** If you have back-office staff not yet armed with remote capabilities, consider how NICE CXone scope could be temporarily expanded should your existing on-premises telecom be unable to support them remotely.
 - Consider if you need to order additional DID numbers to re-route backoffice telecom traffic to NICE CXone.
 - Consider redirected back office emails and/or tasks to NICE CXone ACD to ensure efficient delivery and prioritization.

SCRIPTING CONSIDERATIONS

In times of emergency, your contact center can take advantage of additional CXone Studio capabilities to help handle changes in operations and a potential increase in contact volume.

Disaster Recovery

- Scripts and hours of operation** Consider making changes to your IVR scripts to reflect your contact center's current situation, including changing your IVR message, providing estimated wait time information, and your Hours of Operation.

Hours of Operation with Override Branches empowers you to invoke emergency IVR procedures quickly and easily.
- Callbacks / virtual hold** If you anticipate a spike in call volume and don't currently use callback or virtual hold, consider implementing. This will give your customers the option to hang up and receive a call back when you have an agent available.
- Voicemails** If you anticipate an increase in call volume after your working hours and don't currently route Voicemail through your ACD, it may be an additional option to ensure all customer contacts are handled efficiently upon opening the subsequent day.
- Digital options** Consider activating alternative channels of communication—like digital and social—to provide your customers more ways to reach you.
- Call prioritization** Review your current priority management in queue parameters to ensure inbound contacts are routed based on immediate customer need and potential emergency level.

A BETTER EXPERIENCE FOR EVERYONE

NICE CXone CXone transforms your call center software so you can provide an exceptional agent and customer experience—every time and on every channel. Imagine the possibilities when all your employees work from a single, consolidated interface with a common view of operational performance and each customer’s journey. Plus, with predictive analytics and embedded artificial intelligence (AI), your team can resolve issues faster, personalize each experience—and forge deeper loyalty with each customer.

