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# Implementing a Telecommuting Program

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## Abstract

Numerous recent articles have focused on the advances that Internet Protocol (IP) and voice technologies have achieved to support contact center telecommuting. However, there is limited information on the human resource, operational, and security aspects of the transition from centralized contact centers to distributed agents. The absence of this information has impeded the adoption by many companies of telecommuting within their customer care centers.

This paper examines the implementation of telecommuting capabilities, from an operations management perspective. Based on experience of the Avaya Business Communications Consulting (BCC) team, the paper addresses the human resource, business control, and security components that need to be considered for a successful introduction of telecommuting in the contact center.

## Section 1: Defining Telecommuting in the Contact Center

Telecommuting — or telework — is defined as the use of computers and telecommunications infrastructure to facilitate work in a location different from a centralized contact center environment. It should be distinguished from highly mobile workers whose work requires that they work at many locations.

For the purposes of this paper, we are focusing on the establishment of an effective telecommuting program for contact center agents in which the agent's home will be the primary workplace.

## Section 2: Telecommuting Implementation Requirements

The implementation of a telecommuting program is entirely feasible but should not be considered a simple relocation of the workplace nor the implementation of virtualization technologies. For the company interested in expanding current operations to include telecommuting, it requires (at a minimum) verification that the major dimensions of the contact center — technology, business processes, coaching/management, measurement, and scheduling — all fit into the new operational environment.

The telecommuting voice and technology components are well documented. Therefore, this paper focuses on dimensions that are less visible, namely:

- The employment contract
- Recruiting
- Training
- Coaching
- Work adherence
- Business process authentication
- Confidentiality of business conduct

## Section 3: Employment Contract

Unlike standard terms of employment, if the business objective is to have an employee work in a home-based environment, provisions of the employee contract must be reviewed and may need to be modified. The provisions include:

- The requirement, if any, for attendance at in-office functions such as training, performance coaching, and other formal functions required by the employer

- The requirement that the employee have a dedicated home workspace that is free from disruption by household activities and will be consistently reserved for work use

- The identification of the assets and technology to be provided by the employer and those that are to be provided by the employee

- Allowable mechanisms for purchase/expense reimbursement for services such as telephone and Internet access as well as necessary office supplies

- The responsibilities of the employee for care, retention, and eventual return of any property of the employer

- The acceptable practices for the secure disposal of company and client information, and any access the company may require to the workplace to ensure that those required practices are being followed

- The responsibilities of the employee for securing and maintaining confidentiality of customer and employer information, including locked storage

In addition, the employment contract must outline the responsibilities that the employee has with respect to conduct during working hours, including ensuring that home obligations do not interfere with work responsibilities. The contract must also specify the company's right to ensure that those obligations are being met through tools such as phantom calling, monitoring, or (under reasonable grounds of suspicion) direct monitoring by keystroke, voice recording, and other electronic techniques. (In this regard, consideration needs to be given to local privacy legislation.)

The intent is not to paint the home environment as "big brother" for the employee, but rather to articulate clearly the obligations of both the employer and the employee within a successful working relationship. This minimizes the risk to the organization with respect to confidentiality, security, and stewardship of company assets while providing the employee with an understanding of acceptable minimum standards of behavior. If both the employee and the employer are aware and agree to the mechanisms and controls that are to be put in place from the onset, there is less risk of a problem arising later.

## Section 4: Recruiting

Working from home brings with it a set of challenges that the company must ensure its employees are willing and capable of managing on a daily basis. These include:

- A much more socially isolated environment

- A higher reliance on the individual's motivation and continuous focus

- The ability to manage co-worker interactions without the benefit of face-to-face discussion

- Diligence towards an organized work environment, necessitated by the anticipated clean desk policy and segregation of work from the home environment

- The ability to work independently without continuous direct physical supervision

During the recruitment process, these social dimensions need to be probed. A number of psychometric tools that focus on aptitude, ability, and personality are available to support the evaluation.

When recruiting, it is a good idea to know the work schedule you want applicants to staff, so that you can ensure that the targeted work schedule will meet the applicant's availability. While flexibility is required under specific circumstances, depending on the labor pool the center is recruiting from, it is not a good idea to expect the home worker to be wholly available over the full range of operating hours for the center. As the home worker may be balancing personal obligations, it is in each party's interest to understand any limitations the home worker may have and how those limitations will affect staffing.

Another important dimension of the discussion between employer and employee is the measures and methods implemented for assessing employee performance. This should include the employer's monitoring of adherence, contact management effectiveness, and ratio of non-call related time to total logged-in time. The employee needs to be made aware that in the telecommuting environment, elements such as ring no-answers, unexplained auxiliary (non-work) time, and other periods of non-availability will be treated as performance issues, not coaching issues.

Finally, as a best practice, these items should be part of the verbiage in the employment agreement as well as be part of the discussions that take place during recruitment. The more complete an applicant's understanding of the position requirements is prior to employment, the more successful the partnership between employee and employer is likely to be.

## Section 5: Training

One of the biggest challenges that surfaces with the telecommuter option is building and maintaining an environment that permits the new employee to:

- Absorb the "communications face" of the company

- Feel a part of a larger team

- Become aware of interactions between the contact center and associated departments and stakeholders

- Integrate the company's values into his/her communications with customers

While new employee training programs typically discuss each of these elements, it is usually the initial weeks of work in the office environment that allow employees to integrate these aspects of the work environment into their work structure.

With the home worker/telecommuter, this integration period becomes a challenge. Three options are available to the organization:

1. Implement an intern program in which the new employee works as an in-office employee for an introductory period of time.

2. Expand the sections of the introductory program that deal with the cultural and desired customer experience issues.

3. Engage a "buddy system" with real-time, live cooperation between an integrated resource and the new hire until there is a sense that the new employee is independently functional.

The first option has the advantage of providing the employee with direct in-office experience while not losing initial productivity expectations. However, it incurs some of the costs that the telecommuting program is designed to offset and may preclude access to some of the labor markets previously identified.

While expanding the training program is the most obvious option, it is also likely to be the one with the least success. To some degree, employees will still not be integrating the formal and informal social infrastructure, the internalization of acceptable styles of communication, and other less tangible aspects of the "real" working environment.

The third option, the buddy system, provides the best opportunity to integrate the employee effectively into a telecommuting work environment but will result in resource constraints in the short term.

The obligation to communicate and transfer the company's vision of the customer experience in the contact center to the new hire falls to the company. The initial training program sets a long-standing impression of the value the company places on the customer experience as well as on the capabilities and professionalism of its employees. Curtailing the program in any way — e.g., in quality of materials used, organization, training staff capabilities, or transition of the new employee into the contact center environment — will inevitably backfire and affect the individual's ability to function as an independent, often isolated, home worker.

Regardless of which of the three options is selected, the company will be faced with the challenge of delivering training content to a class that is geographically distributed. Consideration should be given to using Web-based multimedia conferencing and direct-to-home delivery of training materials. The training experience can also include Webcams until such time as live, multi-user video over Internet, integrated into the Web conference environment, becomes more accessible. In locations where new employees are reasonably co-located, the company might be better served by using a locally available conference facility to conduct training; such facilities may be found in hotels, public libraries, and community centers.

When training for a new employee involves a significant amount of remote instruction, communication between the trainer (and subsequently, coach) and the agent will face the same challenges that agents experience with their customers. That is, there will be limited intonation capability, and information typically obtained through body language, facial expression, gestures, and other visual cues is not available. As effective communication in the limited voice-only channel is compromised, so too is training effectiveness. To offset this, the company can consider investment in psychometric tools that assess learning and communication styles before training begins. The results can help the trainer communicate effectively with the agent, and subsequently enable the coach to deliver better feedback and monitoring quality.

To promote the sense of integration among new employees, the company should consider the following additions to the regular training materials:

- Contact lists including new employees, their buddies, and support and management team, with pictures and personal profiles

- A limited number of pre-stamped, pre-addressed envelopes to employee coaches or trainers

- Simple pre-familiarization quizzes and games

- Pre-populated employee desktops with welcome e-mails, checklists, request forms, and user guides

- Initial requests to send a "hello" e-mail to the trainer, find the contact center director on the corporate directory, and other tasks

- Enhanced hotline technical support, enabling the new employees to rapidly resolve technology issues

Some organizations believe the initial startup and integration is so critical to an employee's perception of the company that they have the whole desk, desktop, and training materials delivered, installed, and tested by their own contractors before the new hire officially starts any training.

The initial list of materials and resources provides the new employee with a mechanism for "playing" with their technical and communications environment in a manner that is non-hostile. This role-play activity increases a new employee's familiarization with the environment in which he/she will be working without the structure of formal training or the fear of doing something wrong in a live environment.

As the training program is developed, the company should consider a trial training program with current employees in a pseudo-telecommuting environment. The current employee's evaluation of the effectiveness and weaknesses in the materials can provide initial insights into any necessary refinements.

After initial training, the organization should continue to build mechanisms into the training program for periodically refreshing the sense of identity between telecommuter and company. Unlike the office employee who works in an environment that continuously reinforces these precepts, the telecommuter is much more isolated and as a consequence, will need regular refreshing of company values. It is important that this training not be presented as formal doctrine. The intent is to have the employee emulate and embody a set of values rather than simply conform to the specifications of a "customer experience" policy.

The business process, technology usage, and contact center procedure training components need to be examined to ensure that they work in a home environment and are modified to accommodate differences that the telecommuter will experience. (For example, if supervisors spend the majority of their time on the floor supporting staff, accessing those supervisors in a remote setting may require a different process.) Having the home office setup completed early in the employee's initial training program will provide an opportunity for the employee to become more familiar with the work environment. The training program may need to run several sessions remotely with the employee receiving direction while working in the home office. As the training progresses, the training should incorporate live calls to the agent, first in simulation mode, then in a production mode supported by more experienced staff, and finally in an independent, controlled production environment.

As part of this training and initiation program, the organization should expect to provide extended technical support on the setup and initial use of the home environment. In keeping with the employment contract, best practice is to have the employer take responsibility for the delivery and installation of the materials, technologies, and connections that will be required by the home office. While it is a reasonable expectation that employees be proficient in the using a PC, typing, and navigating a Windows® environment, their principal skill is that of communication, not PC connectivity knowledge. By adopting this method, the organization can also verify that the employee has an appropriate home office work environment.

## Section 6: Coaching

From a coaching perspective, the greatest difference for a telecommuter is the absence of face-to-face contact in the discussion of outcomes and side-by-side support of difficult calls.

As with regular coaching programs, the initial concurrent monitoring and coaching of agents should be more intense in the early weeks of an employee's engagement in the contact center. At this point, the monitoring process should be visible to the new agent and treated as part of the initial training rather than any incentive or performance rating process. Of course, should a new hire prove wholly incapable of providing customer service in the required manner, corrective action should be taken outside of the regular performance recognition cycle.

In an office environment, this early coaching can be supported by side-by-side or lab-based monitoring. This affords the coach the ability to communicate with the employee visually and orally while the agent is on the phone. With the coach being remote from the agent, the coach can use IM-based tools as an alternate informal, near-concurrent coaching aid.

Supervisors will need to deliver coaching feedback by phone rather than face-to-face. To do this effectively, they may need to relearn the same disciplines they learned as agents dealing with customers — understanding communication techniques, the communication deficit associated with voice-only interactions, and the communication style of the employee.

To better prepare coaches for the delivery of feedback over the phone, it is generally worthwhile to simulate coaching in this method with experienced agents, providing coaching in-office but over the phone. The experienced agent can then provide feedback on the effectiveness of the coaching — ironically, assuming the role of coach in this simulated environment.

Background noise needs to be added as a specific addition to the coaching feedback evaluation. (In truth, ambient noise levels should be considered in all coaching reviews, not as a characterization of the agent but rather as a characterization of the contact center and its technologies, facilities, and business practices. However, it is rarely examined.) In the telecommuting environment, particular interest should be paid to the potential aural intrusions of other family members, pets, home appliances, doorbells, etc. It is reasonable for the company to expect the home worker to limit the potential for interruption.

## Section 7: Work Adherence

One of the greatest concerns to organizations as they begin to explore the potential of telecommuting is ensuring that the remote agents are actually at their desks when they are scheduled to be working. It is worthwhile to note that most contact centers do not have this level of awareness of their in-house agents; being at his/her workstation does not necessarily mean that an agent is involved in the active management of calls.

A more complete response, however, is based on the gains made in contact center management technologies. Any contact center technology deployed to support telecommuting must include the tools necessary to determine if an agent, regardless of location, is logged in or logged out, and whether the agent is busy working. The login information must provide a comprehensive understanding of the agent state — i.e., is the agent engaged in a call, is it an ACD (Automatic Call Distributor) queued or direct call, is the agent available, or is he/she in an after-call work or defined non-call related state. Alarming, built into threshold settings, must provide the ability for operational leadership to determine if the agent has been in any state for too long a period of time. In short, the agent state monitoring and reporting capabilities need to be rich, providing a full view of the agent's activities. This oversight capability must be location independent and available in real time as well as historical.

When coupled with the adherence capabilities available through the market leaders in workforce management systems, monitoring an agent's real-time and historical adherence to schedule is no longer an issue. Reporting systems associated with the ACD provide real-time data on agent activities and historical information on interval time in each call state. These reporting systems feed the targeted workforce management systems with information used to determine a remote agent's adherence to schedules, providing the contact center with the same data as that provided for in-house agents.

If the contact center is particularly concerned by agent activity in a remote setting, the automated monitoring tools above can be supplemented by phantom calling. In this context, the contact center launches calls to

an agent when availability passes a particular threshold, to ensure that the agent is able to take a call. The phantom call should be treated overtly when the agent does pick up. As long as the practice is disclosed in the recruitment process and reinforced during training, the response of the phantom caller ("Hi, Sue, just a random phantom call") when the agent picks up should not incite a negative response from the agent. Phantom call skills can be provided to all at-home agents, so the presence of these calls does not skew actual skill counts. The calling program should be statistically defined to ensure that no inherent attention is being paid to a single individual and any conclusion drawn, based on outcomes, has a high degree of confidence. However, if an agent does fail a phantom call, sampling for that individual can be legitimately increased to further validate any finding.

In the recruitment discussion, it is suggested that ring no-answers not be treated as a coaching issue, but rather as a performance issue. Best-of-breed contact center reporting systems can provide immediate identification of these events, which can be directed to the offending agent's coach. Given the "trust" imbued in the home worker model, it is suggested that such events be treated immediately and (as permitted) publicly, to reinforce the importance that the company places on the transgression.

## Section 8: Business Process Authentication

With a qualified agent and the inherent infrastructure necessary to conduct business on your behalf, the next challenge is ensuring that transactions conducted at the home office are those sanctioned by the customer interaction. In the in-house setting, there are three levels of security:

**1.** Active controlled physical access to the facility

**2.** Passive visible verification of a contact center agent

**3.** Active login control of the desktop, telephony, and business applications.

The distinction between passive and active control lies in the nature of the validation. An active validation requires the individual to do something particular to prove that he/she is entitled to perform a function. In a passive control, the individual does not have to do something to prove he/she has a right to perform the action; rather, it is hoped that there is enough awareness in the work environment that any anomaly would be noticed (e.g., "I've never seen you here before — can you show me some ID?").

**Physical Access:** It can be argued whether the contact center provides a more secure physical environment than the home. People are usually aware of those who are in their homes — and presumably, no cohabitant would have an interest in jeopardizing someone's income by illegally conducting a business transaction on a home-based workstation. Comparatively, while the contact center may be access-controlled, there are often cases where non-center employees are found in the center. So, while physical access controls limit those who can enter the center, so does the front door of a home.

**Visible Verification:** This type of verification should not be relied on in any contact center environment and is especially irrelevant for home agents. It is common to see non-agent personnel in the contact center area and unlikely that a colleague would challenge an employee using a contact center workstation. Worse still, there is often an assumption that a familiar face is a legitimate person. So the assumption that this is an effective deterrent is generally without merit.

**Login Control:** Active control of the desktop, telephony, and business applications is equally available to the telecommuter and the contact center-based agent. All agents can be required to log into their PC, the ACD, and business systems. The same password control procedures can be invoked and idle time lockout available. In

addition, given the agent's awareness of potentially more rigorous adherence monitoring, the likelihood of a home agent leaving a desk unattended is much more limited than in the typical center. As an added measure of security compliance testing, it is possible to build adherence controls into application login and logout time stamps.

However, the challenge has been asserted that the home worker environment must be more secure than that of the contact center. To that end, technologies are now available that permit the organization to authenticate technology access, as well as specific sensitive transactions, using biometric technologies. One particular model initiates a challenge and key exchange between a Web server and the client desktop, via an identified thumbprint. The client device is no larger than a memory stick and uses the workstation USB port, so it can be added easily to a standard PC. The use of these technologies provides the following benefits:

- The authentication process is faster and easier to use than password controls. As a consequence, they can be used in business transaction controls without being perceived as obstructive to business conduct.

- Ease of use makes them more likely to be used.

- Authentication capabilities cannot be passed to another individual or stolen. Consequently, the only person who can conduct the transaction is the person authenticated to do so, and his/her biometric authentication can be logged.

- If it is lost or stolen, the authentication is useless to anyone else.

To the degree that an organization would like to ensure that business transactions are fully authenticated, biometric validation provides a mechanism to insert authentication controls into business processes without significant disruption to process efficiency. This level of control far exceeds that enabled by password entry.

In short, when the appropriate measures are taken and the necessary controls put in place, effective operational practices and current technologies can make the telecommuter environment as secure as the contact center environment.

## Section 9: Confidentiality of Business Conduct

The telecommuter environment can be a location where information about clients and the transactions conducted on their behalf is more open to inadvertent disclosure than in a security controlled office environment. The following measures are suggested to limit this impact.

- Specify the requirements of a clean desk policy.

- Provide side-view limiting screen filters to prevent non-authorized users from viewing screen contents.

- Use biometric validation to lock-down the desktop after short idle intervals and to authenticate transactions.

- Ensure agent adherence to desk presence requirements through phantom calling.

- Focus on active desktop and desk security in training, and then reinforce it appropriately.

- Implement a records retention management policy with equivalent or more stringent controls for home workers.

- Include a small paper shredder as part of the home office configuration.

- Include a small office white noise generator to limit voice transmission within the home.

- Review contact center business processes to remove as much paper-based processing as possible. (In general, this is an appropriate action for contact center optimization as a whole.)

It should be noted again that the controls suggested here are more stringent than those applied to any number of contact center employees who take home work that may be even more sensitive than those carried out within the contact center.

### Section 10: Conclusion

This paper discussed a number of the issues related to the implementation of a telecommuting home worker program for contact center agents. Certainly, the particular requirements of each company will dictate the extent to which these and other concepts are implemented. The use of telecommuting is sufficiently prevalent that no industry sector should have the notion that its contact center needs cannot be met through telecommuting. What is important is that any company considering the introduction of a home agent program should think of telecommuting as a business initiative, not just a technology extension. As a business system, the successful implementation of telecommuting requires the collaboration of business process design, human resource practices, technology, and management considerations.

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