

TALKDESK EBOOK

# How to Hire and Manage a Remote Workforce

talkdesk®



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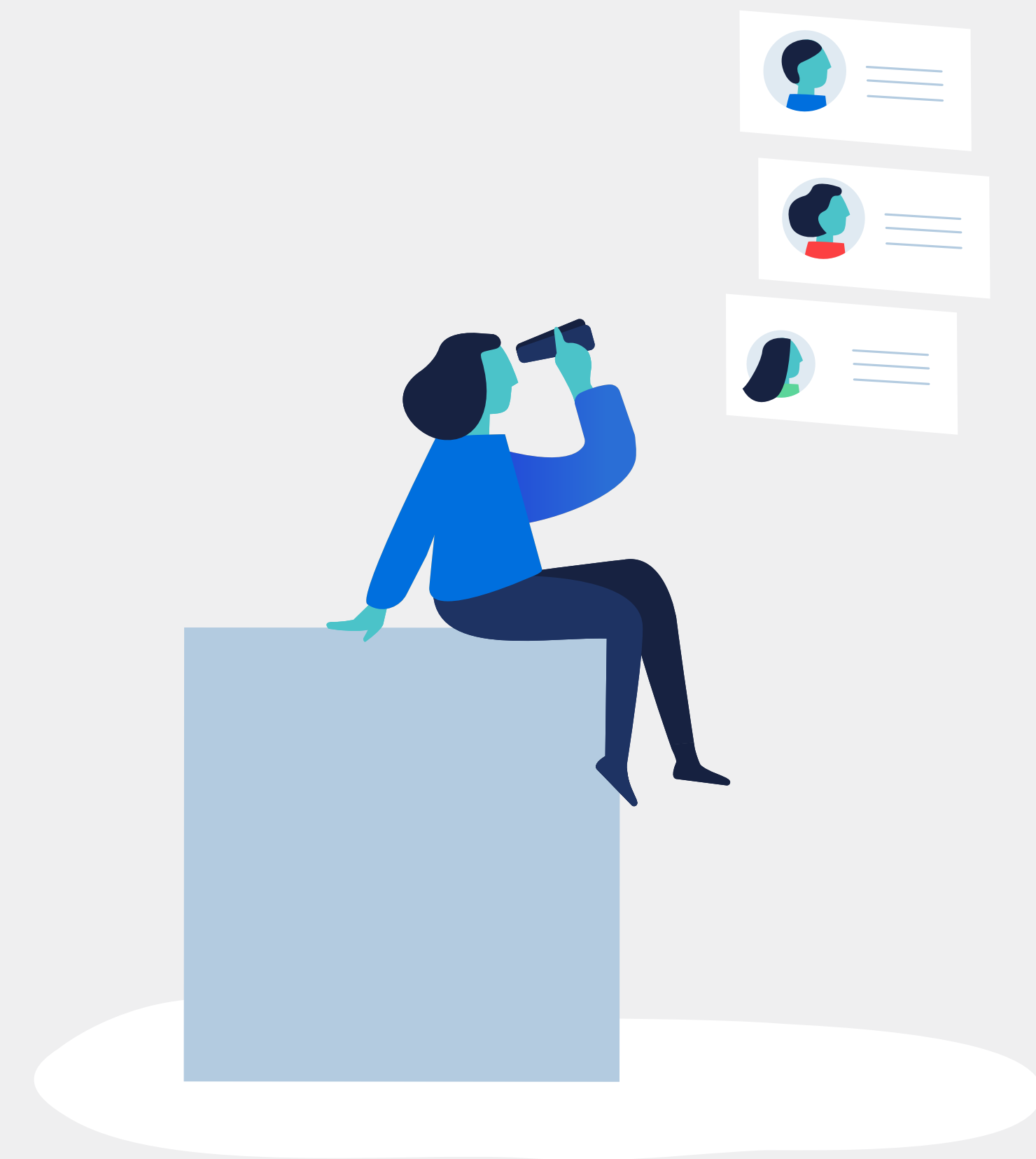


# Introduction

Recent events have caused a seismic shift in how companies must manage customer support operations.

Organizations have rapidly adapted to a work-from-home environment that leverages cloud services and remote-friendly tools to ensure business continuity and keep employees safe. But, technology is just one piece of the puzzle. Customer experience (CX) leaders must also adapt hiring and management processes and styles.

This ebook compiles useful tips and tricks to help customer-driven companies take the right first steps in assembling, training, managing and evaluating an all-star team of remote customer support agents.



# I. How to Hire Remote Contact Center Agents

Customer-oriented companies that prioritize the well-being of their employees can reap incredible benefits from hiring a team of remote customer support agents. By following the steps below, customer experience (CX) leaders can easily assemble a flexible, global and agile team of at-home agents.



## 1. Define your ideal agent

It's important to find optimal candidates for remote work. Hiring new at-home agents offers a much larger candidate pool to choose from (as you are no longer geographically restricted), so you can afford to be more

selective. It removes most constraints that recruiters typically have to contend with when hiring in a local talent pool, such as geographic proximity to the office and available skills within the local talent pool. As a result, companies can be more specific with their hiring profiles which will allow them to solve unique challenges such as ensuring their workforce is more diverse, has specific or niche skills that would be difficult to find in one geography.

Take some time to set clear goals and objectives when deciding what you need in a future employee in relation to the role and your company's culture. This is a good point for you to detail your objectives, budget and

requirements for the role. It also allows you to step back and consider all potential hiring options. With remote work capabilities now broadly available, you can decide whether options such as outsourcing or part-time employment can achieve the desired outcome. You can also consider new avenues, such as gig workers as a way to fulfill your short-term staffing needs. Each option has its own unique advantages and can assist with agility and flexibility when growing your teams. Once you have a concrete understanding of who you'd like to hire and the type of employment agreement, the hiring process will be much smoother.



## 2. Recruit right

Define your ideal agent and detail the requirements for a clear idea on how to recruit. All recruiting materials should be made with this ideal candidate in mind. You can use word-of-mouth on social media, referral incentives and pay-per-click to help. It might also be beneficial to recruit beyond borders as hiring globally will increase the diversity of the team and bring fresh energy and ideas.

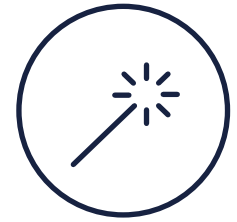
If you choose to outsource work, make sure to pick the right vendor. It's best to work through trusted partners who can assist with Business Process Outsourcing (BPO) evaluation. Often, contact center vendors or consulting service providers have established relationships with select BPOs and can help facilitate the process. Contact center vendors are also familiar with the business so they can help to introduce outsourcers that make a good fit.

An alternative to outsourcing, the latest trend is using a specialized online job marketplace which helps to connect with skilled agents and supervisors who match your hiring needs.

Consider relevant certifications that can act as a pre-hire employee assessment and choose a learning platform that offers hands-on training with a contact center interface, testing employees' ability to learn and adapt to the technology they'll be using daily, if hired. Progressive levels of certification can be used as a pre-hire toolkit to progress candidates through the interview process and assess their ability to learn and perform.







### 3. Hire with an open mind

Hiring the best agent doesn't mean selecting only those who meet stringent criteria. Keep an open mind. For example, some customers will enjoy speaking with an agent in a remote location with a nice accent. Do not overlook candidates that don't have all the expected characteristics because you might miss an opportunity to incorporate some much-needed diversity on your team. Sometimes you might need the stay-at-home mom to work for two hours a day.



### 4. Formally welcome new hires to the team

Once you have made a hiring decision, it's important that the new agent feels like a part of the team. Welcome them by sending out a company-wide email, a greeting over the corporate messaging tool and consider mailing a welcome package. These actions facilitate a personal connection with the rest of the team and help reduce feelings of isolation and single-player conduct that can worsen during a shelter-in-place period.



### 5. Equip them with formal training materials

Regardless of new agents' level of competence or experience, take time to make sure they are onboarded properly. They should all have access to the same training materials, information and the same length of training. Keep in mind that remote agents are adapting to your company and to a work-from-home environment. Allow them the flexibility to choose their training "when and where" to feel more comfortable and committed.

Finally, during the training period, be sure that **the agent is excelling, motivated, disciplined and requires minimal managerial supervision.**



# II. Effective Tips for Training At-Home Agents

The latest trend in at-home agent training centers around online, specialized tools that offer hands-on practice with a contact center interface, testing employees' ability to learn and adapt to a technology they'll be using daily. Save valuable time, money and effort by investing in agile tools that prepare contact center agents to meet the increasing expectations of your customers.

With the right [contact center software](#) and access to a [free online training platform](#), follow these 10 effective tips to prepare your team of work-from-home contact center agents.

## 1. Say “Hi” to the team

Kick off training with a video introduction from the call center managing director, department heads and agent supervisors. Encourage these leaders to introduce their role on the team as well as how the agents can contact them. This will help agents put a face to a name and give them a lifeline when needed.

## 2. Ensure your new agents are business savvy

Your agents should have a comprehensive understanding of your business, product and call center operations. They should also have access to online information about the company culture, mission, core values and vision. With this information, your agents will be more prepared to interact with customers in a manner that is consistent with your business strategy. A [knowledge base](#), powered by artificial intelligence (AI), is the perfect solution to make such information available.

## 3. Explain the importance of schedule adherence

Most new hires don't realize how schedule adherence impacts the call center. Make sure your at-home agents are aware by explaining the impact that schedule adherence has on key performance indicators (KPIs) like service level. It's also helpful to give new hires information on which KPIs managers will assess, how these are tied to performance evaluations, and practical tips on how to hit their KPI benchmarks. Doing so will prepare your new hires to be mindful of these KPIs and adjust their customer interactions accordingly.

## 4. Connect top-performing agents to new team members

Encourage your top-performing agents to connect with new hires and give practical tips on how to excel as customer support professionals. This will set the bar high for newcomers and enhance their insight into how to effectively execute their jobs.

## 5. Reinforce the idea that every customer interaction matters

A great way to enhance agent motivation is to help them understand the role they play in building customer relationships. Educate them on customer lifetime value as well as the cost of a bad interaction. Let them know how the quality of the service they provide impacts customer conversion, retention and loyalty. Once they have this understanding, they will be more motivated to provide top-notch service.

## 6. Provide a script to successfully handle calls

New agents should be provided with examples of appropriate greetings, transfer techniques and how to end a conversation. Allow them to listen to recordings and provide online scripts to follow. Choose recordings that will help you demonstrate specific points such as, how to handle an angry customer, what to say if you don't know the answer to a question, how to give a customer refund, and other common issues.

## 7. Remember etiquette is the ticket to great customer experience

When your agents have a concrete understanding of what to say and what not to say, they are better prepared to deliver a flawless customer experience (CX). Accomplish this by providing guidelines that educate them about call center etiquette excellence.

## 8. Train your agents to be results-driven

Agents must clearly understand the role they play in achieving business goals. Their overarching goal (apart from providing amazing customer service) might be to increase sales or resolve customer issues on the first contact or as quickly as possible. Whatever the goal, agents should know it and know how to achieve it.

## 9. Constantly monitor, evaluate and give feedback on agent progress

Monitor agent performance and provide them with timely feedback. New hires should know exactly what is (or isn't) working so they can adjust their approach accordingly. Keep your eye out for learning or knowledge gaps and do your best to adjust your training approach to fill them.

## 10. Treat training as a never-ending process

Make sure your agents keep their performance high by continually providing refresher courses and training on new products or software to enhance their professional development.

As expectations for exceptional service increase, call center managers and executives must provide agents with the appropriate training tools to effectively meet their customers' needs.

Following these 10 tips will enhance your training curriculum so your contact center agents can provide great CX.



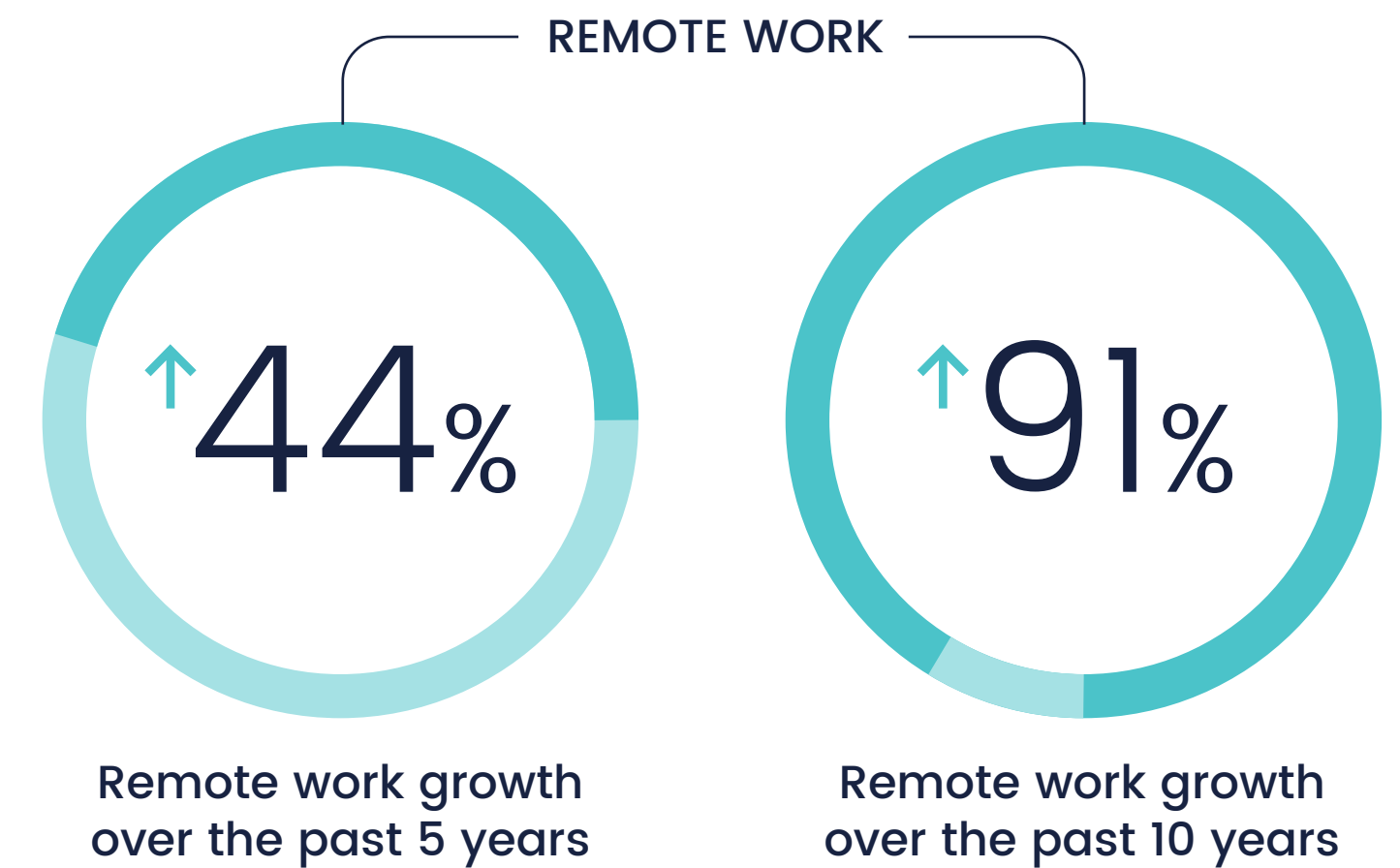
# III. End-To-End Guide for Managing a Remote Team

Remote work has grown more than 44% over the last five years, 91% over the previous 10 years, and proved to be a key enabler of business results. 85% of organizations report an increase in productivity due to greater workplace flexibility. A FlexJobs' survey further supports these findings by adding that 65% of workers are more productive in their home office than at a traditional brick-and-mortar office.

The work-from-home (WFH) model is becoming the new normal. Due to the coronavirus (COVID-19) pandemic, businesses are adapting to ensure the continuity of their operations and the safety of their employees.

While research has uncovered positive trends, remote work does present its challenges at all levels of the organization. Guaranteeing high levels of productivity and motivation while maintaining a transparent and ongoing communication flow is a concern that leaders should pay close attention to, especially now that the workplace dynamic has changed so drastically.

For a smooth transition to WFH, there are many steps you can take to successfully manage your remote team. Some of these include creating and clearly communicating work-from-home policies and guidelines or holding regular videoconferences to keep your team feeling as connected as possible.



# End-To-End Guide for Managing a Remote Team



## 1. Get the right tools

Agents should have access to [free online courses](#) and [collaboration application integrations](#) to get quick help from peers, supervisors and experts.



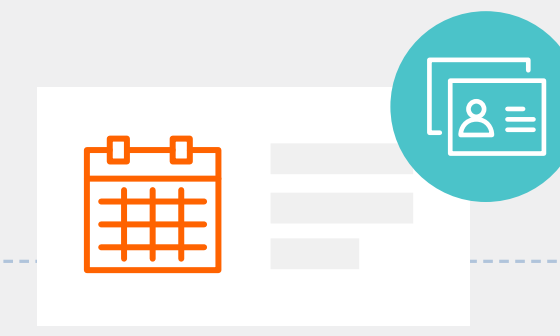
## 2. Prepare your team

Brief your management team to assist remote agents. Get your IT department checking internet connections and establishing troubleshooting processes.



## 3. Training manuals, videos and recordings

Build detailed training manuals and demo videos. Record calls on how to handle a difficult client or what to do when you don't know the answer.



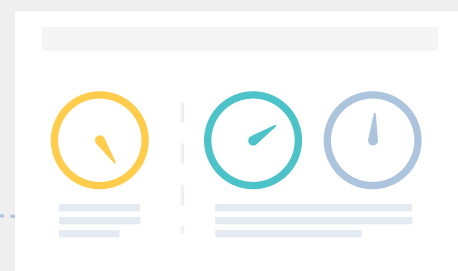
## 4. Policies, procedures and work ethic

Set expectations about: Costs with internet connection, computer and software; Employment status and benefits; Appropriate and inappropriate ways to work.



## 5. Manage effectively

Connect on a personal level with each agent, be available for them, continuously monitor their performance and provide effective guidance.



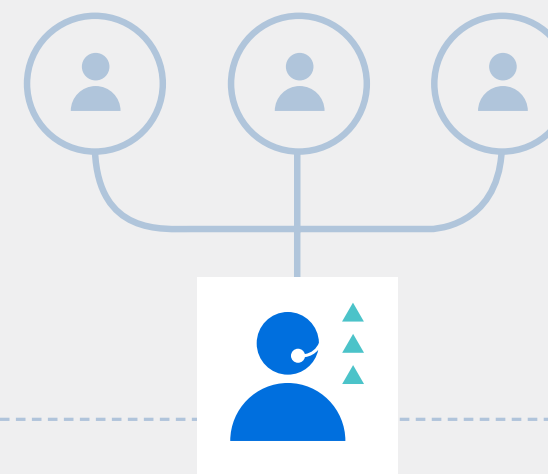
## 6. Focus on metrics

Check these [10 KPIs that affect customer satisfaction with call center service](#) for the must-haves you should keep under control.



## 7. Monitor and provide feedback

Engage in whisper coaching and barge in on live calls when necessary. Provide feedback that is tied to performance metrics.



## 8. Ensure open communication

Schedule daily sessions between manager and agent to reduce isolation and ensure agents know when and how to contact mentors for help.



## 9. Reward good performance

Reward people when they exceed expectations and perform well. Adopt gamified systems for peer recognition and rewards to retain talent.



## 10. Keep your team connected

Group chats and videos are great ways to share funny moments. Send daily newsletters, promote team meetings and online team bonding events.

# IV. How to Evaluate Remote Customer Support Agents?

Call scoring evaluation forms are an invaluable tool for enhancing the transparency and regularity of contact center quality assurance practices — both essential parameters to improve in a remote work scenario. These forms enrich feedback provided to agents during coaching sessions and increase agent motivation to improve performance. As a result, call scoring evaluation forms have become

a mainstay in many high-performing contact centers.

A sample call scoring evaluation form can be found below. Begin using it to monitor calls. Engaging in this process will help you quickly identify areas for improvement and build out a data-driven action plan to boost overall effectiveness of your customer service.



## 1. Greeting

### Did your agent:

- Adhere to the greeting script?
- Identify themselves to the customer?
- Mention your company name?
- State that the call was being recorded?
- Ask for the caller's name?
- Thank the customer for calling?

## 2. Account verification

### Did your agent:

- Verify the customer's account using the appropriate information (e.g. spelling of first and last name, account number, etc.)?
- Easily access the customer's account with the information provided?
- Adapt their account verification questions accordingly if the call was transferred?

## 3. Contact information confirmation

### Did your agent ask for:

- The caller to spell their name?
- The caller's company name?
- The caller's telephone number?
- The caller's email address?

## 4. Problem-solving abilities

### Did your agent:

- Apologize for the issue and inconvenience associated with the problem?
- Take ownership of the problem?
- Ask pertinent questions to accurately diagnose the problem?
- Request the error code message from the caller?
- Use appropriate resources to address the issue?
- Provide the most appropriate solution?

- Inform the customer of the estimated timeline for resolving their issue?
- Inform the customer of relevant supporting documentation to help resolve the issue?
- Confirm that the issue was resolved or the transaction was complete?
- Address the caller's issue sufficiently?
- Provide a reference number to the customer after resolving their issue?

## 5. Protocol compliance

### Did your agent:

- Document important information in the notes of the call?
- Receive prior authorization when negotiating prices, offering discounts or giving refunds?
- Quote the customer with the correct price for the product or service?
- Recommend the most appropriate product, service or pricing plan?

- Leverage upselling and cross-selling opportunities? Inform their colleagues of a new bug, issue or product defect?

## 6. Call-handling skills

### Did your agent follow correct procedures for:

- Placing the customer on hold?
- Transferring the call?
- Conferencing in a colleague?
- Escalating the call to a manager?



## 7. Customer service quality

### Did your agent:

- Use the caller's name throughout the call?
- Summarize the customer's main points before troubleshooting or offering a solution?
- Receive the caller's permission to place them on hold before doing so?
- Limit the duration of hold time to an appropriate amount?
- Mute the caller when appropriate?
- Answer the customer's question correctly?
- Transfer the call to a colleague, when necessary?
- Conference in a colleague, when appropriate?
- Adequately address the caller's needs?
- Transfer the call to a manager when the customer requested for them to do so?

## 8. Contact center etiquette

### Did your agent:

- Use the proper pronunciation of the caller's name?
- Maintain proper tone, pitch, volume and pace throughout the call?
- Use courteous words and phrases?
- Adapt their approach to providing service to the customer based on the customer's unique needs, communication style and problem?
- Avoid long silences during the call?
- Avoid interrupting or talking over the customer?
- Remain confident throughout the call?
- Refrain from using complicated jargon?
- Have a friendly, polite and professional demeanor?
- Use active listening skills?

## 9. Script compliance

### Did your agent:

- Adhere to the script?
- Adequately adapt their approach to interacting with the customer, within the scripts guidelines, when necessary?
- Deviate from script when necessary?

## 10. Closure

### Did your agent:

- Adhere to the call closure guidelines?
- Adhere to the call closure script?
- Set a follow-up appointment, if necessary?
- Ask the customer if they had any additional questions or issues before ending the call?
- Ask the caller if the service they were provided met their standards?

- Ask the caller if there was anything they could do to enhance their quality of service?
- Thank the customer for calling?

## 11. Follow-up

### Did your agent:

- Follow up with the customer within the agreed upon timeframe?
- Introduce themselves to the customer and provide the reason for their call?
- Adequately address the customer's questions?
- Adequately resolve the customer's issue(s), or provide a timeframe for resolution?

# Conclusion

Hiring, onboarding, training and coaching are no longer taking place in-person. HR managers must now be prepared to go fully virtual with their practices. Additionally, supervisors and managers don't have the luxury of evaluating agent performance and identifying potential issues using their own eyes and ears. From the agent's perspective, it can be difficult to maintain productivity in the face of potential distractions. Morale (and engagement) can suffer — and with them, customer experience (CX).

Transitioning from in-person techniques to a remote approach that ensures business continuity to the highest CX standards requires the right tools in place so you can adapt quickly and effectively.

To help organizations build remote teams more efficiently, [Talkdesk CXTalent™](#) offers two unique ways to hire. A CXTalent gig economy platform connects companies with contact center agents, supervisors, managers and system admins who have a wide set of skills, experience and spoken languages and are

actively seeking new opportunities. The CXTalent BPO Partner Program is a hands-on consultative service that evaluates staffing needs and pairs organizations with vetted BPO partners that best meet their requirements. All of the BPOs in the network have been hand-picked by Talkdesk to ensure you receive the best customer service providers at preferred pricing.

As soon as you build or outsource your remote workforce, Talkdesk can further assist in developing and nurturing a team of all-star customer support professionals:

- [Talkdesk Academy™](#) expands team knowledge with a series of free online courses designed to train new hires quickly on the cloud contact center platform and develop their skills through tips, techniques and hands-on learning.
- The [Talkdesk Workforce Engagement Management™](#) suite provides intelligent, intuitive solutions designed to help manage, develop and engage agents throughout the employee lifecycle:

- Talkdesk Quality Management™ makes it easy to efficiently evaluate agent interactions, identify key areas of improvement and provide agents with the actionable feedback they need to deliver an exceptional customer experience.
- Talkdesk Advanced Call Recording™ and Talkdesk Screen Recording™ provide the complete context you need to holistically evaluate customer interactions and streamline agent workflows with synchronized playback of voice recordings and agent screen activity.
- Talkdesk Speech Analytics™ uses AI to transcribe every interaction, analyze customer intent, automate call quality monitoring and identify areas of improvement for agents.

To learn more about how Talkdesk cloud contact center solutions can make customer experience a competitive advantage please click [here](#) to get started.

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Talkdesk® is the cloud contact center for innovative enterprises. 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.

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