

Set agents up for success while working from home



As we navigate these unprecedented times and shift to new ways of working, there are some practical things you can do to support your agents' transition to a work from home model.

In this article we look at what you can do to help your agents, and what they can do to support your customers.

Helping your team make the transition

1

Get the tech right

Customers will be forgiving if things are not perfect – but they will expect your team can hear/see/help in the interaction.

Internet speed, knowledge base access and up to date information that is accurate, simple and relevant (and consistent across all agents) is vital to maintain first call resolution.

Train your team in basic troubleshooting for things like microphones or headphones not working and checking internet speeds – as they are used to having IT support onsite to help with this area.

2

Protect customer data and privacy

Team members now working from home, where they have others in the household, need to accommodate having relatively sensitive discussions regarding financial, health, legal or other generally private matters –while honouring customer's privacy.

Sequestering themselves away in locations that the information being discussed remains private is important.

Where possible – a multichannel environment where customers can type/chat some responses rather than having to articulate everything might be helpful at both ends of the conversation (remember the customer may be calling from a non-private environment too).

3

Embed a daily communication rhythm

Don't make the assumption that silence means everything is alright – have a daily check in where ideas, challenges and solutions are shared to maintain a sense of connection across the virtual team.

Maintaining a consistent pattern helps to enforce the traditional office norms and enables the sharing of best practice ideas and techniques.

Use this check in to keep your quality monitoring program alive – providing feedback, guidance and advice as needed.

4

Inject some fun and foster team connection

Members of your team will be having their own anxieties (and likely be dealing with your customers' anxieties all day) – it is important you find time to have fun, relieve stress and recognise the work that is being done.

Have a 'guess whose workspace this is?' photo competition, or 5pm 'wine and shine' happy hour via video to celebrate the end of a good, challenging week – just like you would during normal office times. 'Virtual bake offs' or 'MasterChef' lunchtime plating up competitions.... can inject some energy and levity into the daily agenda. Get the team to brainstorm ideas and drive these initiatives – they will enjoy it – and it is one less thing for already busy leaders to remember to do.

This list is not exhaustive – but it's a starting point. Now, let's talk about your customers...

Supporting your customers through this time

1

Supporting the channel shift

We've seen a shift to digital customer service for a while now – but many more customers are likely to embrace these channels in the coming days and weeks. For some, the experience will be new to them – so think about whether navigation aids need to be updated or created – particularly for differently abled customers. For example, does your website follow [best practise accessibility guidelines](#)?

2

Learn how to replace visual cues

Frontline staff who normally work on your service counters are used to being able to 'understand' customers based on what they can see – age, ethnicity (potential language barriers), disability, mood state (busy/friendly/professional/casual/agitated/concerned etc) and a whole plethora of visual cues.

A quizzical look from a customer indicates they might not have understood something – which helps the agent to know they should retry, slow down, point to or expand further. Shifting to telephone servicing will mean these team members need to use different skills – take the chance to refresh them on some important techniques:

- **Take the temperature throughout the call** with little check ins – Does that make sense? Have I still got you there? Can you see that part of the page/form that I'm referring to?
- **Use sign posts and outline what is going to happen** or what steps will occur throughout the call to help the customer prepare.
- **Respond to customer cues:** If a customer says 'I'm worried' – acknowledge it rather than rush past it – 'Yes, I can understand that is causing you some concern – Let's see what I can find for you about that...'. If a customer shares a disappointment – make time to indicate it was heard – 'oh wow, cancelling the wedding after all the plans were in place – that would be disappointing'.

3

Manage the person – not just the process

More than ever, agents need to view their work as human-to-human interactions – not transactions.... Callers who are self-isolating will be wanting to connect with the outside world and wanting to converse and ask questions – not face rapid fire information download.

An interaction is a two-way dialogue – agents need to avoid making assumptions (in the quest to be quick and efficient) and to consult on the solutions offered.

- **Check for acceptance:** agents need to employ a 'do it with me' approach – not 'do it to me' approach – when working through options with customers over the phone, chat or email. After recommending something they should check how the customer feels about that option – 'do you think that would suit?' or 'do you think that could be the way to go?'
- **Connect on a personal level:** agents can make the interaction memorable and a great experience by sharing something small about themselves. It could be how they've been effected by the current situation – 'the thing I'm going to miss the most is my favourite muffin from the coffee shop' or 'I've decided to ride my bike instead of the tram – good for my fitbit scores'.
- **Use the customer's name:** nothing makes a person feel more like they are seen and are unique than using their name. It makes the interaction feel focussed, tailored and unscripted.

4

Carry most of the load – make it easy for the customer

Agents are in a unique position to help the customer – they've handled vast quantities of similar queries or problems, they're experienced and have seen a plethora of problems and creative solutions.

We encourage high performing teams to bring all their empathy, listening skills and experience to the fore and predict what would help the customer without the customer having to remember to ask.

- **Answer the unasked questions:** agents can really leverage the current situation because we are all experiencing the same thing (demonstrating true empathy). Imagine 85 year old Beryl Smith mentions she is going to pop to the Post Office to pay her water bill tomorrow – a helpful agent might tell her about alternative options (bill smoothing or direct debit) to avoid going to the Post Office under the circumstances. 'People in your situation often benefit from knowing....at this time....oh and one other thing to keep in mind is!'
- **Outline the plan:** customers want to know you can solve their problem – 'I've had experience with this question or area before and have a few solutions to we can look at' or 'Ah ok, Marge, the good news is I am going to be able to help. I'll take you through a few options and we'll work out the best thing for you – I've handled a few of these matters this week already - how does that sound?'

At CSBA – we're here to help you with your transformation – be it driven by an external shock like the Covid19 pandemic – or just part of your strategic plan to be better for employees and customers. If you need us – we're here to help you create better customer experiences.