

WORK AT HOME (WAH) TEAMS: Techniques for Enhancing Performance Results

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If your firm has responded to the COVID-19 pandemic by expanding or implementing a work at home (WAH) program, you are likely concerned about sustaining or improving performance results. There's no doubt, WAH programs present unique challenges and cannot be managed like brick-and-mortar operations. What appears to be simple really requires the skillful blending of people, process, and technology; it truly is an exercise in managing complexity. To be successful, WAH operations must continue to leverage front-line supervisors and support staff to communicate performance expectations and results, identify/correct the root causes of performance failures, and, through effective coaching, motivate teams and individuals to perform. Listed below are some communication tools and tactics McIntosh has found to be highly effective when managing a remote workforce.

VIRTUAL PERFORMANCE BOARDS Maintain performance focus through the daily publication of agent and team results. Stack rank results to motivate agents (e.g., desire to remain in the top quartile, desire to move up in rankings) and spur inter-team competition. Online boards enable supervisors to utilize performance data in multiple communication venues such as:

- Virtual team huddles conducted in an open video room where performance expectations for metrics/goals are discussed, prior day and month-to-date actual results are shared, new operational/service information is reviewed, and agents have the opportunity to identify performance barriers; this is also a great opportunity for public shout-outs to high performing team members
- Virtual chat "walk-about" or in-video coaching sessions with agents, based on daily performance insights - connecting on a daily basis is important in the virtual setting
- Daily group supervisor performance review meetings with second level managers via a conference or video call; during sessions, each supervisor reviews their team's prior day's performance and discusses steps they are taking to improve results (time limit of three minutes or less per supervisor)

CHAT SOFTWARE Provide supervisors and agents with a chat application to make the transition to WAH less challenging. Agents report they feel supervisors are more accessible when they update their status throughout the day (e.g., online, away, in a meeting, offline, on break, etc.). Chat software may also be used as a tool for accessing a dedicated help desk that answers WAH agent questions or handles escalated calls—much more effective than the brick-and-mortar floor walker concept. While a phone call to a help desk may still be more efficient, chat has been used by some clients very effectively.

TECHNICAL HELP DESK Our clients and network members all agree a critical success factor for WAH is to provide the WAH staff with a direct number *for technical assistance*. Clients report significantly less downtime when dedicated technical resources support the transition to WAH.

CHATBOTS Consider using an intelligent virtual assistant (IVA) chatbot to provide natural language search capability on the agent desktop. The IVA returns answers rather than links to multiple documents, optimizing

usage of existing knowledge content and improving ease of search. Leading providers in the IVA space include Verint NextIT and 24[7].ai.

OPEN VIDEO ROOMS Video conference rooms by WebEx, Zoom, or Google+ Hangouts allow supervisors to conduct team meetings, provide individual coaching sessions, participate in management meetings, and share best practices and lessons learned with their peers. The rooms can be used for quick impromptu meetings or for regularly scheduled sessions with agents. The “face-to-face” aspect is a powerful contributor to employee engagement

“SIDE-BY-SIDE” MONITORING Supervisors can advise an agent of a timeframe when they plan to listen to the agent’s calls and then send a chat reminder when the monitoring session begins. Alerting the agent that they will be monitored at a specific time is almost as effective as sitting by their side since, in theory, the agent will be on their best behavior. The objective is to compare the behaviors/results on calls observed when the agent is aware of the supervisor’s presence vs. other random recorded calls when the agent is not aware of being observed. By comparing performance in these two situations, the supervisor can determine if the performance issue is skill-related (lack of job knowledge) or will-related (the agent knows how to perform but does not do so consistently). Determining if the issue is skill vs. will is the first step in root cause analysis.

SPEECH ANALYTICS In an effort to measure compliance on required call handling attributes, leverage a simple speech analytics approach to identify the absence or presences of key words and phrases. Supervisors can then access the flagged calls to determine if there is an issue and provide feedback.

METRIC REPORTING/DRILL DOWNS Similar to the brick-and-mortar environment, supervisors must use data to understand the root causes of performance gaps so they can focus on removing those causes. It is critical that supervisors have reporting or scorecard drill down capabilities. They then utilize the drill down data combined with monitoring or other analysis to identify the behaviors contributing to poor performance. It is not enough to say, “Your average handle time (AHT) is high, get it down.” The supervisor must understand *why* AHT is high by identifying the underlying behaviors driving AHT higher, and then be able to explain how behavioral change will improve AHT. The primary difference for WAH teams is the delivery channel for the coaching, which will be in one of the virtual settings as outlined above.

AGENT MENTORING In the brick and mortar environment, using expert agents to mentor a struggling agent is a best practice. However, in a virtual environment, this approach is more challenging. Managers must identify and train mentors using a specific curriculum on how to interact with other agents virtually, the important elements to demonstrate during call handling, and how to debrief the agent’s supervisor remotely after completing a mentoring session with an agent.

While the engagement approach and delivery channels may differ for WAH teams, the core elements of performance management remain the same: clear and consistent communication, thorough and ongoing root cause analysis, and focused coaching to motivate teams and individuals. These processes are fundamental for success, regardless of where agents take calls or what channel front-line supervisors use to communicate with their teams.

For more information and additional insights, please contact:

Beverly McIntosh, President & Managing Partner



(214) 289-5972 bmcintosh@mcintoshassociates.com