

**CONVOSO**

# Running a Profitable Remote Call Center

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Best Practices for Managing  
Productive Work From Home Agents



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How a Remote Call Center Switched Dialers and Found Incredible Success



# Introduction

## Practical tips to manage and improve the productivity of a virtual call center

This guide is a resource for those looking to start, manage, or improve a profitable virtual outbound call center operation. With the right tools and best practices to optimize your [cloud-based dialer](#) and manage your remote team members, maintaining a focused, motivated, and productive environment.

In our guide for virtual call centers, we'll look at technical workstation requirements, tools for driving ROI, and management strategies to help your call center thrive.

**It may be easier than you think.**

## Which Situation Fits You?



### Existing Work From Home

Your call center is **currently a remote operation** and your team consists of at-home agents and managers. You're looking for strategies to increase productivity and improve profitability.



### Considering WFH Transition

You're considering a **switch to a remote workforce model** with agents working from home. But you're not sure whether it will work for your business, about the logistics of converting, or how you'll be able to effectively manage the operation remotely and monitor agent productivity.



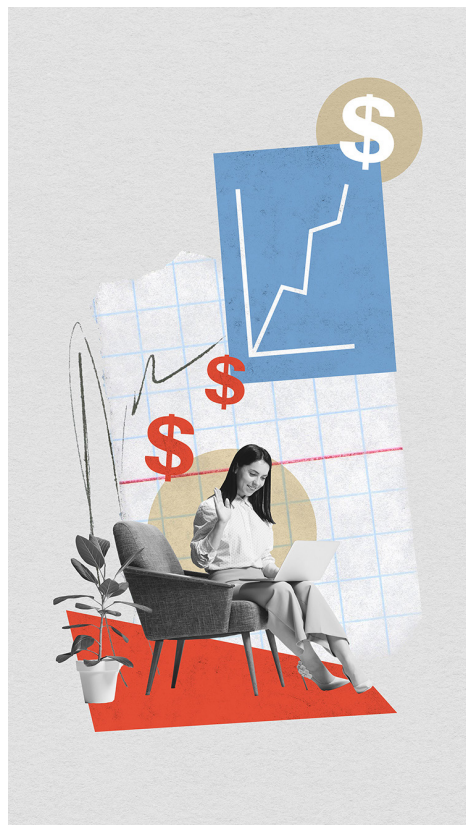
### Starting From Scratch WFH

You want to **start an outbound call center** for lead generation, but you want a team of remote agents. How do you begin? What's involved? Can you be effective? Will it work?

# Why Remote Work Is Here to Stay

Working from home and flexible work arrangements had been steadily on the rise prior to 2020. But the disruption resulting from the COVID-19 pandemic thrust many call centers into a sudden, forced transition to virtual operations.

Years later, after restrictions have fallen away, many call centers are not going back to the “old” in-person model. Instead, leaders now see that this new way of running things not only works, but that from the standpoint of productivity and morale, it might offer an improvement.



## The No-Longer-New Normal

The virtual call center model—or a compromise hybrid model—is no longer a stopgap solution. Indeed, the number of remote call center agents is expected to grow by 60%<sup>1</sup> between 2022 and the end of 2024. This virtual model can offer a number of advantages to both agents and businesses overall.

### > ORGANIZATIONS OPERATING REMOTELY CAN:

- Cut down on expensive office space costs
- Build their teams from a broader pool of agent talent
- Function with fewer geographic restrictions
- Scale their growing operations more quickly

1. “Top call center statistics to know [2024],” *sprinklr*. February 2, 2024. <https://www.sprinklr.com/blog/call-center-statistics/>

### > MEANWHILE, SURVEYS OF REMOTE WORKERS HAVE FOUND:

- The ability to work remotely increases happiness by as much as 20%<sup>2</sup>
- 98%<sup>3</sup> of remote workers would like to continue doing so at least part-time for the rest of their careers.
- 65%<sup>4</sup> of remote workers say they’re more productive while working from home, while another 25% say they’re equally productive.

Of course, for even the most seasoned call center managers and teams, the WFH call center presents unique challenges even as it offers exciting possibilities. That’s why, in the chapters that follow, we’ll dig into everything your virtual operation needs to succeed, from start-up to scale-up.

2. “Remote Work Increases Employee Happiness by 20%, New Study Finds,” *Forbes*. May 5, 2022. <https://www.forbes.com/sites/bryanrobinson/2022/05/05/remote-work-increases-employee-happiness-by-20-new-study-finds/?sh=69aac9e03183>

3. “State of Remote Work 2024,” *Buffer*. <https://buffer.com/state-of-remote-work/2023>

4. “State of Hybrid Work 2023,” *Owl Labs*. <https://owllabs.com/state-of-hybrid-work/2023>



1

# Building & Managing Your Virtual Team

How to Support Productivity  
and Drive Optimal Performance.





There's so much great technology out there. It can alert us and catch bad behavior. It can tell us who our top performers are. However, it's even more powerful to remind ourselves that as leaders, as managers, for ultimately all people, **employee engagement** is key to a successful remote call center.



**Heather Griffin**  
CEO, Jenova Solar

# Building a Foundation of Engagement and Connection



## Human Connection

When you operate a physical call center, there's an audible bustle and energy that comes from having many agents in one place, working together toward the same goal. While working from home is different, the goal of building connections and driving collective action remains the same. What actually changes, then, is how you accomplish that.

There are many ways to create positive connections, foster strong relationships, and, ultimately, fuel productivity, retention, and growth.

For one, call center admins and managers can access a range of tech tools that help them monitor behavior and optimize performance.

But long before that, from the day you make your first hire, remote leadership also needs to keep a finger on the pulse of their relationship and the very real humans who are on their team. Find ways to nurture connection and you'll be rewarded with higher motivation and reduced turnover.

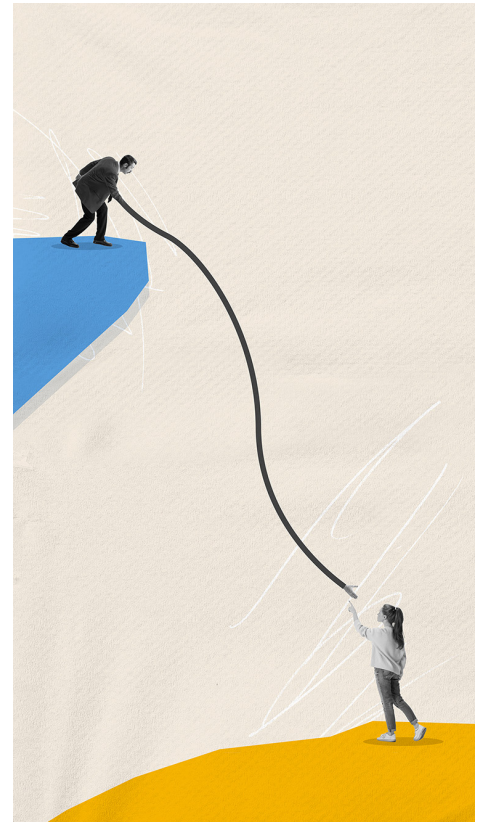


## Start with a Shared Vision

In the remote call center environment, certain aspects of company culture take on an outsized importance. Perhaps above all, you need to have a vision and company mission that all your employees can buy into.

While the comfort and flexibility of remote work may be a draw for some employees to work for your organization, it's your vision—and your agents' buy-in—that will ultimately keep them at your company and keep them productive.

As Jason Cutter explains, this vision should be a central aspect of your hiring and onboarding process. Rather than focusing solely on the products agents will be selling, be sure you train agents on the brand that they're a part of—and get their buy-in from the beginning.



Explore other ways that call centers are renewing the focus on agent engagement.

[Read the article →](#)



Make sure your training and new hire curriculum includes onboarding into your company culture. It's your **mission**, your **vision**, your **core values**. It's why agents work for your company. And it's why the company does what it does.



**Jason Cutter**

Cutter Consulting Group





## Training New At-Home Agents

Education and early training don't just provide your agents with the knowledge they need to succeed, it's also an important opportunity to establish connections and camaraderie. Managers need to make this time count.

Build a robust and varied onboarding program that takes advantage of the latest eLearning programs and technology:

- Share slide presentations over web platforms.
- Work through role-playing activities that simulate real interactions, teach rebuttals to [common sales objections](#), and help agents [handle angry customers](#).
- Use [Dynamic Scripting](#) to help agents get on the phone faster. This software tool will load pre-written scripts that respond and update in real time as a conversation unfolds, guiding agents from "Hello" to close.
- Leverage AI-powered [sales QA](#) software that can track all of your team's conversations and accelerates management's ability to identify coaching opportunities and deliver feedback.



Convoso's Dynamic Scripting allows our trainers to train and develop agents because the **basics** and the **foundation** is already there for them when they sit down. Dynamic Scripting is so important for new agents that might have problems getting marbles out of their mouth. And being able to read what needs to be said, is probably a lot more **comfortable** for some people when they start.

**Aaron Culbertson**

Executive VP, Homecraft Gutter Protection



## Provide a Clear Path Forward

Establishing clear, shared expectations with your agents from the beginning of their tenure is essential. Managers can make clear the sort of work they expect. And, perhaps more importantly, agents can gain an understanding of what they can achieve in return for that work.

Using a template such as a 30-60-90 day plan, teams can work out short-term learning goals and training priorities.

In addition, businesses should be able to provide a clear vision of what lies beyond those first months, being transparent and laying out all available opportunities for advancement. Make sure agents understand specific steps and benchmarks required to progress. This gives them an incentive to focus on achieving their goals.



If you don't have a formalized **career progression program**, you need one for remote working. It's monotonous, repetitive, you never get out of your pajamas, you're always in the same cycle. In my career progression programs, it's very clear. 'If you're here for six months and you meet these expectations, you're eligible for a lead training program.' That **gives people hope**, and it **helps with retention**.

Heather Griffin  
CEO, Jenova Solar



## Incentive Compensation

Incentive compensation is the key to unlocking motivation and high performance. Indeed, 90%<sup>1</sup> of top-performing companies use some form of it. Compensation plans can take a variety of forms, but no matter what, they should focus on providing rewards that target behaviors where you're seeking improvement, based not only on productivity metrics, but also on QA and utilization scores.



## Recognize High Performers

Even beyond your standard incentive compensation model, be sure to recognize your high-performing agents. Display leaderboards, provide spiffs, and offer loads of public praise and acknowledgment whenever possible.



## Continue Building Relationships

Rapport within your remote team is important. To maintain connection among your remote call center agents, you can use conferencing and meeting tools to encourage recreational interaction for your team with games, virtual happy hour, trivia night, celebrating birthdays, and so much more.



Explore our guide to call center incentive options.

[Read the article](#) →

1. [https://theirf.org/research\\_post/ten-things-top-performing-companies-do-differently/](https://theirf.org/research_post/ten-things-top-performing-companies-do-differently/)



# Best Practices for Effective Communication

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Support your agents' productivity with communication best practices

## 1. REMOTE COMMUNICATION PLAN

for handling call escalations. Is an escalation taken as a call back? Or will agents transfer the call to a supervisor? What if the supervisor's not available?

## 2. BRIEF DAILY COMPANY AND/OR TEAM MEETING

led by a member of leadership. Communicate essential company updates, events, goals, and shoutouts.

## 3. INSTANT MESSAGING/CHAT

is your go-to tool for individual and small group communication throughout the day. Broadcast chat helps leadership distribute quick messages to the remote team.

## 4. ONE-ON-ONE MEETINGS

give supervisors and employees the opportunity to communicate clearly about goals and historical performance, as well as career growth and progression.

## 5. EMAIL

is best for high-level communication, especially as a follow-up to your daily team meeting. When agents are dialing, they're typically not checking their email—nor do you want them to.

“

Make sure you have a really **clear path** for all of your **workflows** when you move to remote.

Heather Griffin  
CEO, Jenova Solar

2

# Resources that Drive Transparency and ROI

Reports and Communications Tools to Run a Profitable Call Center.





“

We had about 400 agents working remotely from home, and we were able to see what they were doing at **any time**.

|

**Heather Griffin**  
CEO, Jenova Solar

# Use Reports to Increase WFH Productivity

With flexible and informed decisions based on real-time reporting and intelligent analytics.

With your team spread across many locations, your software's [reporting capabilities](#) are (or should be) your window onto your sales floor, offering a clear picture of performance.

Look for software that delivers not only standard reports on key metrics but also all the customizability you need. In addition to a user-friendly dashboard, you should be able to get granular with combinations of filters, fields, and breakdowns across your most important KPIs. Not only that, look for two kinds of reporting capabilities:

**Real-Time Reports** to effectively monitor and manage the action as it unfolds

- Agent Calls Report
- Leads Reports
- Agent Productivity

**Historical Reports** with analytics that provide intelligent insights into list and agent productivity trends over time

- List Conversion Report
- Agent Performance Reporting
- Disposition and Pause Time Reporting
- Time Clock Monitoring



Want to know which numbers you need to keep an eye on? Dig into our guide to 16 essential outbound call center KPIs.

[Get the guide](#) ➔

“

The **Agent Productivity Report** is a huge help for us, as we are a 100% remote team, so the supervisors can't be checking in on them as they would in an office.

Digital Market Media



## Real-Time Insights

Things happen fast in the call center. Reporting needs to be able to keep up. Your virtual dialer system should track what's happening with your remote agents in real time—and display it with a clear, customizable dashboard. Understand everybody's status:

- Who's on a dead call?
- Who's on "Not Ready" mode or pause?
- How many calls are active?
- How many agents are available?

Meanwhile, there's no shortage of other KPIs to watch in real time:

- Abandonment rate, dropped calls, dial rate, and lead numbers

Monitoring performance in real time is key to success. Hourly monitoring is best, but at a minimum, managers should be reviewing mid-day reports to quickly course correct as necessary. The best call center software should also automatically email important reports at regular intervals.



Can you track your agents' talk time, pause time, wrap-up time? By total calls, and filtered by other factors?



An **Agent Calls Report** breaks down total calls taken and made into outbound, inbound, and manual callbacks.



Can you view your leads info at a glance, filtered by status, campaign, list, and user?



**Lead Reports** reveal if leads are stuck in a list, if they're converting (or not), and help calculate CPA.



Do you know how your agents spent their time? Both billable and non-billable?



An **Agent Productivity Report** gives a breakdown of agent time within the dialer, broken into total time, billable time, login time, not ready/ready time.



## Historical Perspectives

Real-time data is crucial, but you still need to be able to understand the fuller picture of your call center's productivity.

Maintain this balance with an eye on essential historical reports that help you understand broader trends in the performance of individual agents as well as your call center as a whole. Historical reporting helps you understand the bigger picture and make broader improvements by providing clear-cut answers to questions like:

- Who are my most (and least) productive agents?
- Which of my lead sources are the most profitable?
- What is my true Cost Per Acquisition?

### > TIME CLOCK MONITORING

Ensuring agents are on-task during their scheduled hours becomes particularly critical when operating a remote call center. In some cases, agents might clock in to get paid, and go on to other activities before they actually clock into the dialer. By checking daily, managers can also see if this happens at breaks and lunch.

Can you track the productivity of agent time?

Keep agents on-task with **Time Clock Monitoring**.

### > DISPOSITION AND PAUSE TIME REPORTING

Virtual call center managers should be tracking employee utilization, which is the percentage of the time you're paying an employee that they're on a workable status. WFH agents should aim for utilization rates of 80% talk time (waiting for or talking on a call), and 20% pause and dispo time.

Do you know the percentage of time you're paying for a employee on a workable status?

Track **employee utilization** with Disposition and **Pause Time Reporting**.

### > AGENT PERFORMANCE REPORTING

A standard report showing number of calls taken, number of sales, conversions like percentage of sales to data, etc.

How many of your agent's calls are converting to sales? What's the conversion rate on a list?

Track performance of agent calling activity with an **Agent Performance Report**.

### > LIST CONVERSION REPORT

With this highly customizable report you can find out:

- How many leads were dialed?
- How many leads actually got on the phone?
- Contact rate
- Number of sales
- Transfer rate
- And more, filtered for any period you want

Can you run a quick profit and loss report on your lists?

Combine revenue and billable hours to get an overall profit-loss for the report period you run with a **List Conversion Report**



A **List Conversion Report** will show you who you're talking to and if it's working. I can see if a list is burnt because our contact rates are super low. I can see a list that's converting. And more importantly, I can turn off lists where we talked to a lot of people and it didn't result in sales.

**Heather Griffin**  
CEO, Jenova Solar



# Improve Agent Productivity with Effective Tools that Target



## Communication Tools

Keep agents connected to leadership guidance and performance goals with good communication tools.

### > BROADCAST MESSAGING

With broadcast messaging, managers can motivate the team of at-home agents and create a positive virtual culture. Messages can be sent to all or to selected agents.

### > VIDEO CHAT AND MEETING TOOL

Zoom, Google Meet, MS Team, Skype, etc.).

While this seems obvious, the value of these tools for remote call center operations needs to be stressed. Hearing the voice of leadership give clear direction and guidance, and seeing familiar faces makes a big difference in keeping your WFH agents motivated.

### > LISTEN AND WHISPER

Admins can listen in on calls, whisper to agents, and jump in on conversations if needed.

### > BREAK TIME REQUEST

Increase productivity with greater accountability by managing agent breaks. Admins need the ability to approve or deny break time requests from agents. Auto-approval of certain times (e.g., frequency and duration of breaks) can be preset.



## Accountability Tools

Remote management is easy with tools to monitor agent productivity (and real-time reporting).

### > AGENT MONITOR SCREEN

You need this to view vital campaign information such as dial level, drop rating, number of dialable leads, and total number of agents that are currently logged in. The admin should be able to monitor every agent's status and listen to their live calls.

### > WRAP-UP TIME LIMIT

Set the amount of time agents are permitted following a call (wrap-up time) before they are timed out with a forced pause and an automatic popup message you've set.

### > AGENT PRODUCTIVITY LOGS

Keep tabs on agent log in and log out time stamps, as well as their availability status with reason codes. Think of the agent log as a timeclock.

### > AUTO LOGOUT

Admins can use logic rules to auto logout agents if they're on a dead call for too long or spending too much time on a pause code, e.g., lunch. Reports can be run on auto logouts and pause codes.





## Agent Support Tools

Keep agents connected to leadership guidance and performance goals with good communication tools.

### > CUSTOMIZABLE AGENT DASHBOARD

Improve agent experience with easy-to-use streamlined dashboards with customizable colors and layouts.

### > LEAD FOLLOW-UP AUTOMATION

Use a schedule to automatically decide when to place an outbound call or send non-voice communication (text message, email, or [Smart Voicemail Drop](#)) with personalized details that drive more inbound calls. Outreach continues over selected channels until conversion or for as many days as you set.

### > STATE/SKILL ROUTING

Your predictive dialer should automatically route leads to agents according to state, language, demographics, or whatever criteria you need.

### > STREAMLINED CALL PROCESS WITH QUICK DISPOSITIONS

Agents can cut wrap-up time if they take action during the call rather than waiting until the call has ended. Flexible transfer options also save time.

### > DYNAMIC SCRIPTING TO SIMPLIFY CALLS

Reduce training time and streamline calls with better results in transfers and sales, with increased opportunity for cross market conversions.

### > WORKFLOW DIALING

Stagger your calls to reach your leads at different times of the day for maximum connection rate 1st call attempt - right away, 2nd - 15 min. later; 3rd - 45 min. later; 4th - 3 hours later; 5th attempt - 2 days later, etc.



3

# Your Dialer Software

The Engine that Powers Your Performance and Profitability

Unlock Winning Solutions and Strategy with the Right Software.



# Finding the Right Virtual Call Center Software

Your call center software must keep you and your remote team connected, and it must deliver transparency and insights into their performance. However, in today's competitive environment, these capabilities represent the bare minimum requirements—if that.

That's because, beyond reporting and communication, your call center's dialer needs to be the engine that drives your sales and lead generation operation forward. It should power new efficiencies and improved strategies. It should unlock profitability and scale.

In short, it should be your competitive advantage.



## Essential Capabilities & Features of Virtual Call Center Software

So, beyond those things we've covered already, what exactly do today's virtual call centers need to look for in the right dialer? Let's dig in.

### > CLOUD-BASED CONNECTIVITY

Virtual call center agents can be anywhere. Their dialer needs to be able to go anywhere, too.

With a cloud-based dialing solution, teams won't need to worry about the installation and updates that downloadable software requires.

That's why they should opt for a browser-based SaaS dialer platform like Convoso. With a web-supported solution, your agents will have everything they need in one easy-to-access place, and managers will have the data analytics and agent performance monitoring they require as well.

(Just be sure that your agents also have a device with the tech specs that can run the software. We'll cover those later in this chapter.)

### > POWER, SPEED AND SCALE

Just like engines, not all dialers are capable of delivering the same power. But that doesn't stop just about every dialer provider from claiming they offer a "powerful" system. How do you cut through the messaging and wind up with a truly powerful system? Start by zeroing in on these key aspects of dialer performance:

- **Throughput with Intelligence**

You have a lot of leads, and you want to get them on the phone. How do you do that in the most efficient way possible? One big part of the answer is throughput, which is a dialer's ability to put through many calls at once without dropping calls.

An intelligent dialer will offer the right balance of power and efficiency—dialing a high number of calls while automatically making sure it's not more than your headcount can handle.

- **Speed to Lead**

The second trait that separates truly powerful dialers from the rest of the pack is [speed to lead](#). Speed to lead is the amount of time it takes for a business to reach a lead after they've opted in to be contacted.

The dialer needs to be able to reliably connect a high number of calls to your agents, and it also needs to be able to prioritize warm leads as soon as they're in the hopper to maximize contact rates and conversions.

- **Scale**

You need a dialer that performs now and down the line, after you've added more agents to your team. The last thing you can afford is a dialer that suddenly can't handle your call volume and responds by dropping calls—or worse, powering down completely.

Explore service-level agreements, uptime statistics, and reviews to understand how many agents software can support, as well as how quickly they can be added. And most importantly, give any dialer you're seriously considering a test run by setting up a trial.

### > CRM INTEGRATION

In the modern call center, data is everything. To deliver the best customer service or sales experiences, call center agents need access to up-to-the-minute customer info. Call center software that seamlessly integrates with your CRM system—or offers a [built-in CRM for lead management](#)—can deliver that data while eliminating inefficiencies.

### > CALLER ID REPUTATION MANAGEMENT

If you can't get customers and leads on the phone, you can't grow your business. And with Spam Likely labels plaguing even the best of today's outbound sales businesses, you need tools that help you call with clean caller IDs.

Caller ID reputation management solutions are a must for maintaining healthy contact rates. Look for a tool like [Convoso's ClearCallerID™](#) that helps you respond to call flagging before it impacts KPIs—and supports smarter strategies to help avoid flagging and labeling in the first place.

### > ANSWERING MACHINE DETECTION

When agents are dialing leads, nothing interrupts their flow quite like a voicemail message. Answering machine detection (AMD) software helps ensure that agents are only connected to live leads, not answering machines.

Of course, not all solutions are created equally. Look for [customizable AMD technology](#) that delivers the highest level of accuracy possible to keep your agents on the phone and building sales momentum.

### > OMNICHANNEL SUPPORT

To convert today's leads, you can't rely on just one channel. That's why your software should enable outreach across voice, text, email, and more as part of a comprehensive, coordinated omnichannel experience.

With [automated email](#) and [two-way SMS solutions](#) built into your software, you can reach customers in the channels they prefer. And with [workflow automation](#) tools, adding these channels into your outreach cadences doesn't have to require tedious planning or guesswork on the part of agents. Instead, they can stick to sales and support, while the software system handles the rest.



This is a contact sport. No matter what vertical you're in, you have to contact enough people to make it work. If you don't have the **right technology**, nothing else matters.

David Stodolak

President, Solar Direct Marketing



# Harness the Power of Conversational AI at Your Virtual Call Center

AI is no longer a luxury for just the highest-achieving, best-funded call centers. Today, it's quickly becoming table stakes for any organization looking to compete in outbound sales and lead gen.

In fact, as our partners at [Balto](#) found, in 2023, AI usage grew from 59% of contact centers to an incredible 90%.

Looking forward, today's leaders must ask themselves: Will our call center's AI strategy be part of this new age? Or will it be left behind?

Of course, they may also be asking, what AI solutions should we be using? While more exciting offerings are surely on the horizon, we think leaders should look to two cutting-edge options to bring their operations up to date.



## AI-Driven Quality Assurance Software

Call centers are complex operations. Keeping tabs on all the conversations that unfold at high-volume centers has long been a tedious and, ultimately, impossible task.

Typically, a small team would monitor some of the calls made by some of their organization's agents. The rest? Those would be left to chance or, at best, potentially reviewed at a later date. However, conversational AI-powered tools are changing all that, adding previously unheard-of scale and precision to call center QA.

The latest QA tools, like those from leaders like Balto and [Observe.ai](#), leverage conversational AI that can record, process, and understand human language to:

- Listen in on every call
- Deliver post-call analytics straight to the agent
- Streamline the process of providing coaching and feedback

- Empower QA teams to uncover deeper insights and offer more improvements
- Provide on-call guidance to sales agents in real-time

Rather than pick through conversations manually to uncover issues affecting performance, leaders can simply ask their AI. Identifying failed rebuttals, departures from the script, and non-compliant behavior is now as simple as typing, "Show me all of the calls where that happened."





You can get very intelligent information that helps you make **better decisions** and **optimize** your contact center. And I think if you don't have that edge very soon, you're going to be left behind.



**Bobby Hakimi,**

Chief Product Officer & Co-Founder, Convoso



## Predictive Analytics and Reporting

This accelerated analysis and enhanced efficiency isn't limited to conversational insights, though. Decision-makers can also drill deeper into their data with the help of AI and fine-tune the way they dial, text, and email leads. With AI-driven analytics and reporting solutions, improved outreach strategies are no longer hard-won—they're hard to avoid. As Convoso's Bobby Hakimi explains:

**“You can even ask (an AI) for suggestions like ‘What is the best time to call based on my success rate, sales, conversion, or customer sentiment?’...All of that is data the AI can consume and give an answer back to you.”**



Conversational AI that drives more sales

[Learn more](#)



## Intelligent Virtual Agents Expand Your Capacity

You've learned just how AI can help your agents perform better.

But what if you could also put AI to work as another agent entirely?

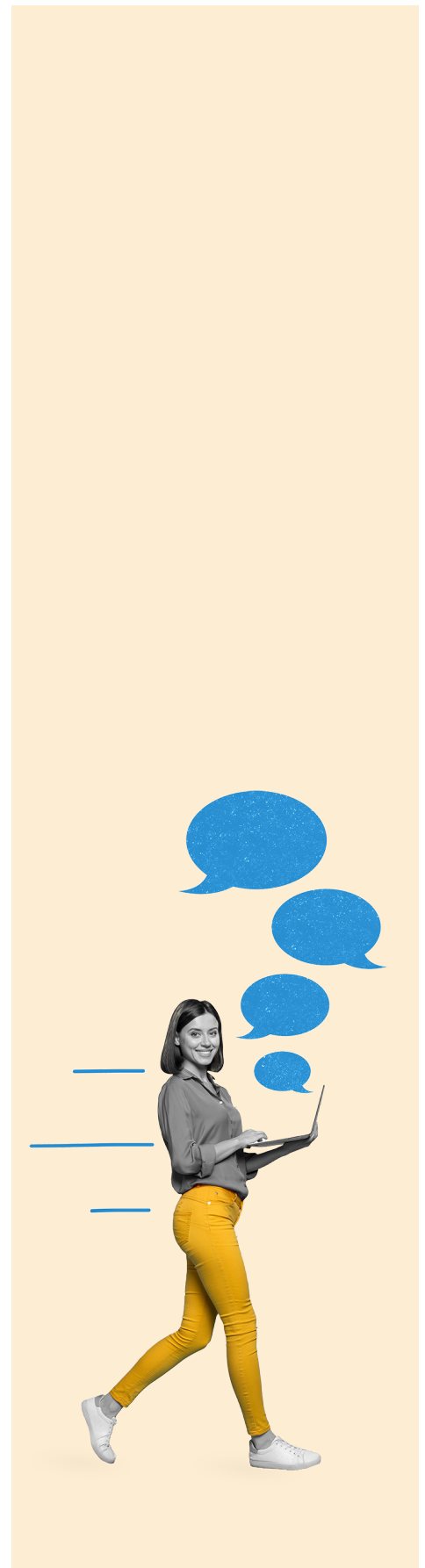
What if you could delegate lower-level tasks to an AI-based agent that's fully equipped to field inbound calls and texts, pre-qualify leads, schedule appointments, and set your reps up for success?

This is the promise of intelligent virtual agent (IVA) software.

### > WHAT IS IVA SOFTWARE?

If AI QA software offers improved conversational intelligence, IVA offers them AI-driven conversations. Bringing the full power of conversational AI technology to bear, IVAs supplement human sales reps by serving directly in customer-facing roles.

Over voice and text, IVAs can understand complex customer input and respond with remarkable life-like fluency. This makes IVA solutions like Voso.ai a jack-of-all-trades for teams looking to enhance the quality and expand the quantity of their conversations.





## Drive Personalized Engagement at Scale with Voso.ai

Convoso's conversational AI platform, Voso.ai, is the only solution designed to meet the demands of sales and lead gen contact centers.

Our IVA software takes time-consuming and routine tasks off the hands of your agents, fluently conversing with leads and customers over in the channel of their choice. Voso.ai is the ultimate weapon in your sales arsenal, purpose-built to pre-qualify more prospects, set more appointments, and generate more revenue with a lower CPA.

Integrated directly with the Convoso platform, the industry's fastest and most powerful dialer, Voso.ai leverages conversational AI to engage prospects in both text- and voice-based channels. Add Voso.ai to your team and boost your virtual call center's profitability by:

- Eliminating time-consuming tasks and empowering human agents
- Pre-qualifying leads at a fraction of the cost
- Turning after-hours calls and texts into callbacks and appointment-sets
- Keeping leads engaged and shortening your sales cycle
- Improving conversion rates and generating more revenue

Discover a revolutionary new path for growth with Voso.ai. Learn more about what Voso.ai can do for your business and schedule a [free demo of Convoso today](#).

## Easy Tech Setup for Basic Remote Workstations



### What Tech Do You Need to Support Remote Agents?

Readers considering starting or switching to a virtual model may be wondering what exactly is required to support advanced call center software with features like those discussed in this chapter. The reality is, perhaps surprisingly, not that much! In fact, your team could be ready to work from home tomorrow with as little as a Chromebook, headset, and stable internet connection<sup>1</sup>.

(Note that the Convoso system works optimally with 10+ seats.)



1. Specific minimum requirements depend on your contact center software. For Convoso customers, detailed technical support specs are provided. We recommend using a device that meets or exceeds our minimum requirements. This provides a strong, reliable connection while utilizing 3rd party software programs (ex: CRMs and/or web applications), as well as Convoso's proprietary software. Devices that do not meet our requirements are susceptible to exhibiting issues such as choppy audio ("jitter") that may result in a dropped call.

# Tech Requirements to Jump Start Your WFH Agents

## Hardware



### Computer

Provide at-home agents with laptops that are dedicated to work and dialing, and include built-in webcams. Chromebooks can be purchased for as little as \$200.

Avoid using personal computers, due to potential security concerns, as well as their inability to confirm technical specs and the capacity to complete work-related tasks.

Recommended*	Not Recommended
<div></div> <div>Laptops or Chromebooks with built-in webcams, dedicated to work and dialing.</div>	<div></div> <div>Personal devices (potential security concerns, inability to confirm technical specs and capacity to complete work-related tasks)</div>



### Headset

Remote agents need a headset compatible with your dialer system, preferably with echo-cancellation built into the microphone for the best possible call quality. Avoid using earbuds, hand held phones, and speaker phones. (Convoso customers prefer Jabra UC VOICE 750 MS)

Recommended	Not Recommended
<div></div> <div>Headset compatible with your dialer system, preferably a USB cabled echo-cancellation built into the microphone for best possible call quality. (Convoso customers prefer Jabra UC VOICE 750 MS).</div>	<div></div> <div>Earbuds, hand held phone, speaker phone</div>

In the event of audio issues because the agent's setup does not meet recommended workstation and/or network requirements, inquire about a softphone (external phone), which could potentially address the issue.



Software



Web-based SaaS platform

Your agents shouldn't have to worry about installing or updating software on their computers. A remote call center operation needs a cloud-based dialer with multiple outbound dialing modes, prioritization for inbound dialing, and built-in dynamic scripting. This will get your agents up and running more quickly and help improve quality.

Recommended	Not Recommended
<div></div> <div>Web-supported SaaS dialer platform with multiple outbound dialing modes, prioritization for inbound dialing, and built-in dynamic scripting.</div>	<div></div> <div>Your agents shouldn't have to worry about installing, updating, or troubleshooting software on their computers.</div>



Connectivity for At-home Call Center Employees

Few things are more important to the remote call center than a reliable internet connection. If possible, avoid WiFi. A wired ethernet connection is best. Be sure to provide clear instructions to remote agents on how to connect their computer to an ethernet cable. Minimum 1 Mbps of dedicated upload/download bandwidth.

Recommended	Not Recommended
<div></div> <div>Adequate network speed, bandwidth, and stability are critical for quality audio and overall site operation. Preferably use wired ethernet for a reliable internet connection. Alternately, workstation set up in close proximity to WiFi router. Minimum 1 Mbps of dedicated upload/download bandwidth.</div>	<div></div> <div><ul style="list-style-type: none"><li>• WiFi connection (less recommended)</li><li>• Mobile/personal hotspots are not recommended</li></ul></div>

4

# Keeping Your Virtual Call Center Legal

Compliance Support Tips.





## Key Compliance Concerns for Remote Call Centers

Call center compliance can be a minefield for even the most diligent, vigilant businesses. All businesses reaching out to leads have a range of regulations at both the federal and state levels to consider. Chief among these laws are:

### > TELEPHONE CONSUMER PROTECTION ACT (TCPA)

This federal law, enforced by the FCC, regulates telemarketing calls, auto-dialed calls, prerecorded calls, and text messages. The complex regulation dictates which consumers can be contacted and how, including prohibitions to consumers listed on the Do Not Call (DNC) Registry and others. It also requires specific disclosures and restricts calls to between 8:00 AM and 9:00 PM.

### > STATE MINI-TCPA LAWS

In recent years, an array of states have passed their own telemarketing laws, each with different restrictions on call times, disclosures, and different dialing systems. In effect, these laws have created a patchwork of varying rules for call centers to navigate. Use our quick [reference guide](#) to familiarize yourself with these restrictions.

### > PRIVACY LAWS

Meanwhile, a growing number of individual states have also enacted consumer privacy laws placing restrictions on the usage and storage of consumer data. Given the varied work environments of remote call centers, the complexity of privacy compliance only increases in a virtual model.



## Perform a Risk Assessment – Privacy and Compliance

Enlisting the help of outside counsel is essential. These outside experts can perform a risk assessment to uncover problem areas in your operation and establish what's known as a “defensible position” to support compliance as best as possible.

According to our partners at Mac Murray & Shuster, LLP, such an assessment might cover:

- **Information collection:** Assess what information you collect and why, then review what controls you have in place, and which are still needed, based on applicable laws, such as GDPR, HIPAA, and other consumer privacy regulations.



- **Tech concerns:** Assess what kind of controls or lack of controls are in your agents' remote environments. Consider internet connection, firewalls, data encryption, and the use of personal computers/devices, which can pose an increased risk of ransomware, malware, and other security vulnerabilities.
- **Home Environment Policies:** Establish protocols to protect data from inadvertent access of others in the home environment, including overheard phone conversations by people and personal assistant devices. Training and policy formation will be critical here.
- **Mitigation Steps:** Determine what can be done to mitigate risks and cover gaps identified in your assessment.
- **TCPA Violations:** The same level of risk analysis and mitigation should be performed for TCPA compliance concerns, with documented and defensible positions for all your campaigns.



## Compliance Safeguards Your Dialer Should Be Providing

Preparedness can go a long way, but your dialer provider should offer a solid foundation and feature a proactive approach when it comes to supporting compliance. Look for these software features to help bolster your TCPA compliance strategy.

### > DYNAMIC SCRIPTING

Scripting software isn't just a tool to help agents get on the phones faster and more confidently. It's also effective in supporting compliant conversations.

### > TCPA COMPLIANCE TOOLS

Scripts are far from the only aspect of call center operations that need to support compliance, though. Look for a call center software that takes a proactive approach to compliance issues, offering compliance-centered features and tools like DNC scrubbing, easy [call scheduling](#), and automation that minimizes the risk of human error.

### > CUSTOMIZABLE, LOCATION-SPECIFIC SETTINGS

Beyond the TCPA, having software that can be customized and automated to respond to each individual state's regulations is crucial. That's why Convoso has introduced its [StateTracker](#) tool, the only purpose-built solution for helping outbound sales teams comply with daily maximum attempts and other restrictions under Mini TCPA-style laws.



Dig Deeper on Compliance Issues: Download our TCPA Compliance Checklist.

[Get the guide](#) →



# How a Remote Call Center Switched Dialers and Found Incredible Success

For virtual call centers, having the right dialer can make all the difference when it comes to productivity and profitability. Digital Market Media (DMM) is an inbound call generation company serving clients in multiple industries by providing their sales teams with a steady stream of qualified prospects. When they went looking for a software partner that could help them rapidly expand their remote call center operation, they found the perfect fit with the Convoso dialer.



## >300%

Increase in contact rates

## 400%

Increase in Transfer Rate

## THEIR CHALLENGES

Delivering high quality leads in a volume that meets Digital Market Media's client expectations requires a level of efficiency and tools that were lacking in DMM's previous dialer. "Our redial capability greatly hindered performance and ROI - we were dialing through too many leads inefficiently," said former Director of Operations, Kyle Anderson. The company's goals were to increase:

- Volume of calls
- Remote agent productivity
- Number of qualified leads transferred to clients

## OUR SOLUTION

- Advanced Caller ID Management
- Omnichannel features
- Automated workflows
- Support of dedicated product expert
- Optimization of DMM dialer configuration
- Real-time in-depth automated reporting
- Comprehensive historical data analytics of lists and leads
- Streamlined processes with productivity tools for WFH agents
- Reduce agent wait time with Quick Disposition Tool

## THE RESULTS

DMM grew quickly with Convoso's more robust dialer, new capabilities, and tools:

- ✓ Contact rate surged from 7% to 20-30%, lead to transfer rate, steadily increased from 2% to 8% for significant ROI impact
- ✓ Doubled agents in two months
- ✓ Previously unavailable automated management reports with real time analytics saves an hour a day

# Get dramatic results for your call center

## About Convoso

Convoso is a CCaaS leader of contact center software for sales and lead generation teams. Since 2006, Convoso has continuously innovated solutions to drive customer growth, while supporting regulatory compliance. Its omnichannel capabilities include conversational AI gamechanger Voso.ai to further scale sales and revenue.

[Schedule a demo](#)



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