Running a Profitable Remote Call Center: An Indispensable Guide

Best Practices for Managing Productive Work from Home Agents

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Guide Contents

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

This guide is a resource for best practices that support a profitable work from home (WFH) outbound call center operation. You need effective tools and support to optimize your cloud-based dialer and to manage your at-home team so they are focused, motivated, and productive.

We 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.
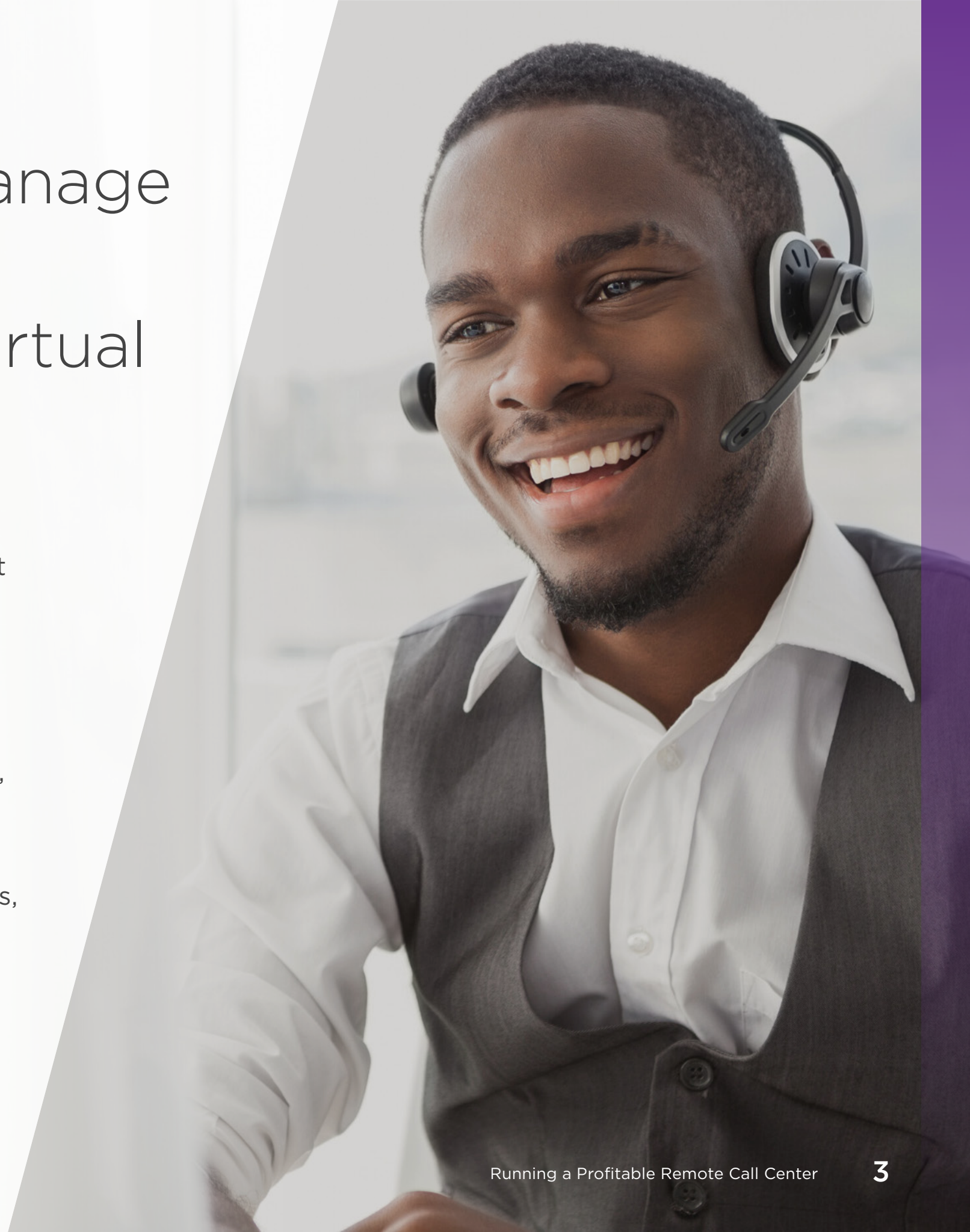
Which Situation Fits You?

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?

1

WFH Resources that Drive ROI

Tools, Reports, & Technical Requirements to Run a Profitable Call Center

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Easy Setup for Basic Remote Workstations

For readers considering the switch to remote or starting from scratch, the advanced technology of a browser-based call center software solution will allow you to smoothly transition your agents to work from home. Your team could be ready to work at home tomorrow with as little as a Chromebook, a headset, and a stable internet connection.[1]

[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

Summary	Recommended*	Not Recommended
Computer	Laptops or Chromebooks with built-in webcams, dedicated to work and dialing.	Personal devices [potential security concerns; inability to confirm technical specs and capacity to complete work-related tasks]
Headset	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]	Earbuds, hand held phone, speaker phone.
Software	Web-supported SaaS dialer platform with multiple outbound dialing modes, prioritization for inbound dialing, and built-in dynamic scripting.	Your agents shouldn't have to worry about installing, updating, or troubleshooting software on their computers.
Connectivity	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.	- WiFi connection (less recommended) - Mobile/personal hotspots are not recommended

*For Convoso customers, we recommend using a device that meets or exceeds our minimum requirements. This will provide a strong, reliable connection while utilizing 3rd party software programs (e.g., 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 - **Hard**ware

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.

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]

ASCENT Mortgage Group

STORY OF SUCCESSFUL TRANSITION

Ascent Mortgage Group was opening a third office in New York City to accommodate their growth when the coronavirus shutdown hit.

The company acted fast to maintain business continuity and supplied their now at-home agents in NY and Colorado with headsets and computers. Using Convoso's virtual dialer, they were soon up and running with a remote operation.

Chris Robinson, President of Ascent Mortgage Group, recalled that the transition was seamless. After a couple of weeks he learned that agents had contacted Convoso's Customer Success team on their own to help configure their dialers for optimal performance. Chris reports that the remote agents are motivated, getting more done, and increasing revenue.

The call center managers use Convoso's communication tools and reports to create a positive culture and jump in with support. Chris and his managers are so pleased at the success of these work from home agents, that they plan to continue with a hybrid call center.

Tech Requirements -
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.

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.

[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.]

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We found moving to remote operations to be a smooth transition with Convoso. In fact, we've experienced a strong volume of calls and improved results.
—Melvin Merritt, Call Center Director, NextGen Leads

"

We've even seen an increase in our productivity since transitioning to remote agents.
—George Mueller, VP Sales, NextGen Leads

Use Reports to Increase WFH Productivity

with flexible and informed decisions responding to real-time reporting and intelligent analytics

" Right now, we've got about 400 agents working remotely from home, and we are able to see what they're doing at any time.
—Heather Griffin, SVP Inside Sales, Momentum Solar

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Your cloud-based contact center software should be able to customize reports. From standard reports, you want to be able to access combinations of metrics easily by using filters, fields, and breakdowns.

If you don't have customizable reports like these to track your KPIs, you're not maximizing the profitability of your virtual call center

Real-Time Reports to effectively manage your call center

→ Agent Calls Report
→ Leads Reports
→ Agent Productivity Reports

Historical Perspective with analytics that provide intelligent insights into list and agent productivity

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

ROI-boosting metrics used by most successful outbound call centers. Learn about more KPIs in this article: https://www.convoso.com/16-essential-kpis-for-lead-gen-call-center-profitability/

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Real-Time Insights

You want a virtual dialer system that shows in real time what's happening with your at-home agents, with a clear, customizable dashboard to monitor every employee and their 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?

Other important metrics to watch in real time are:

→ Abandonment rates, dropped calls, dial speed, and if you're running out of data.

Monitoring performance in real time is key. Hourly monitoring is best, but at a minimum, managers should be reviewing mid-day reports, so you have the opportunity to course-correct. Good call center software will also automatically email production reports at regular intervals.

Real-Time Insights

> **[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.**
> —Kyle Andersson, Director of Operations, Digital Market Media

Can you track your agents' talk time, pause time, wrapup 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.

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

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

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.

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

Historical Perspectives

Can you track the productivity of agent time?

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

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**

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.

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.

Historical Perspectives

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**

"

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

> 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**

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

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Improve Agent Productivity with Effective Tools that Target

Communication
Accountability
Agent Support

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If you don't have these capabilities, you're missing opportunities to maximize the profitability of your virtual call center

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.

Listen and Whisper

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

Communication Tools

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

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

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 [eg, frequency and duration of breaks] can be preset.

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If you don't have these capabilities, you're missing opportunities to maximize the profitability of your virtual call center

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.

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.

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

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.

If you don't have these capabilities, you're missing opportunities to maximize the profitability of your virtual call center

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 ringless voicemail] 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.

Agent Support Tools

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

Streamlined Call Process with Quick Dispositions
Agents can cut wrapup time if they take action during the call rather than waiting until the call has ended. Flexible transfer options also save time. Reduces action to one click.

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.

2

Managing Your Virtual Team

for optimal performance

Great Communication

is the lifeline to effective management and agent productivity

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.

"

Make sure you have a really clear path for all of your workflows when you move to remote.
—Heather Griffin, SVP Inside Sales, Momentum Solar

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.

"

Engagement and Connection

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, SVP of Inside Sales with Momentum Solar

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, there are many ways to create positive connections with shared activities that continue to build relationship.

Call center admins and managers can access a number of tech tools that alert them to a range of behavior from unfavorable to excellent performance. But remote leadership should also keep their finger on the pulse of 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.

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Continue Building Relationships

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

Recognize High Performers

In addition to daily meetings, be sure to recognize your high performing agents. Display leaderboards, provide spiffs, and offer loads of public praise and acknowledgement whenever possible.

Empowering At-Home Agent Performance

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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.
And that gives people hope, and it helps with retention
—Heather Griffin, call center expert

Training of New At-Home Agents

Onboarding for the remote call center operation means taking advantage of eLearning programs, sharing slide presentations over web platforms, roleplaying over webcam, dynamic scripting, and other methods.

Incentive Compensation

Incentive compensation is the key to unlocking motivation and high performance. Compensation plans should offer incentive rewards targeting behaviors where you're seeking improvement, based not only on productivity metrics, but also QA and utilization scores.

More tools and info addressing sales compensation are available from the sales consulting firm, The Brevet Group.

Career Progression

Career progression is the path to retention. Make sure your call center agents know specifically what the steps are to progress in their jobs. This gives them incentive to focus on achieving their goals.

3

Keeping Your WFH Call Center Legal

Tips for compliance from
MacMurray & Shuster LLP

Key Compliance Concerns for Remote Call Centers

Develop a Remote Work Plan for Your Business

→ Know key points of new legislation. Tax credits for two weeks paid sick leave.

→ Record Hours Worked. Track via dialer, keep records 3 years.

Risk Assessment - Privacy & Compliance

→ Collecting Information

→ Tech Concerns

→ Home Environment

→ Mitigation Steps

→ TCPA Violations

→ Affidavits for WFH Agents

For more details, watch the WFH Webinar:
Keeping it Compliant: Legal Aspects of Running a Virtual Call Center

Compliance Tips* from MacMurray & Shuster LLP

Michele Shuster
Partner

Lisa Messner
Partner

MacMurray & Shuster

* Disclaimer: Nothing in this e-book is meant to convey legal advice. You should consult an attorney for legal guidance on compliance matters.

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Compliance Safeguards Your Dialer Should Be Providing

Contact Center Compliance Solutions

→ Be proactive

→ Scrub against an internal Do Not Call list

→ Don't overdial leads

→ Use 3rd party compliance integrations [e.g., Trusted Form, ActiveProspect, Jornaya]

→ Set up dynamic scripting for your agents

→ Use skill-based routing for state compliance

For more details, watch the WFH Webinar:
Keeping it Compliant: Legal Aspects of Running a Virtual Call Center

State-by-State Compliance

quick reference guide*

Be sure your dialer is up-to-date with all the rules.

Every state has different requirements. For example, your dialer should not be making a call to anyone in Alabama on the first Monday in June because it's Jefferson Davis Day. In some states, the agent needs to give their full name or their address, while in others, they can't rebuttal.

Use our quick reference guide to help your outbound call center stay in compliance. The chart, courtesy of our friends at law firm Mac Murray & Shuster, shows specific calling restrictions for every state, including time and day restrictions, as well as holiday restrictions.

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I can't imagine how an agent can remember which disclosures to use, especially with changes going on all the time. At Convoso we implement smart scripting capability which, based on recognizing the state that the call is either coming from or going out to, displays the appropriate disclosures into the script.

—Nima Hakimi, CEO, Convoso

* Current at time of publishing. Please check with your attorney for latest updates.

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The Future of Virtual Call Centers

Why so many call centers
are going remote

In the News: Tech Companies Go Remote

Following announcements by Twitter and Square that remote work is here to stay for their employees, Facebook CEO Mark Zuckerberg made a similar announcement, as reported by the New York Times.

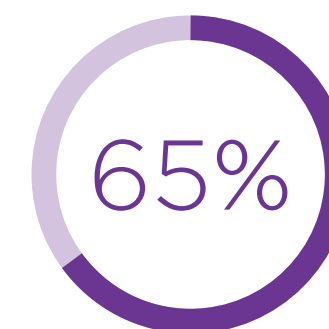Mr. Zuckerberg said, "I expect that remote work is going to be a growing trend."

By allowing remote work, Facebook can broaden its recruitment, retain valuable employees, reduce the climate impact caused by commutes and expand the diversity of its workforce, Mr. Zuckerberg said.

For some companies, working from home is a privilege earned by performance.

Aaron Levie, CEO of Box, a business technology company

Aaron Levie ✔
@levie

The push happening around remote work is as game-changing for the future of tech as the launch of the iPhone was in 2007. This is not about real estate; it will change how products will be designed, how teams collaborate, and how companies will be run going forward.

♡ 934   11:35 AM - May 21, 2020

💬 268 people are talking about this

Our Poll of Remote Call Centers

65%

In a poll Convoso conducted of call centers operating remotely during the 2020 pandemic shutdown, 65% said that their future plans were either to continue with all WFH agents, or to employ a hybrid of remote and in-office agents.

Work from home call center operations are discovering new ways of managing productivity and driving profits. Hiring remote agents expands the talent pool and geographic options. For our modern workforce, working at home offers flexibility and opportunity, especially for Millennials and Gen Z.

Advantages of Remote Call Center Operations

→ Cuts office space costs
→ Large pool of talent
→ Fewer geographic restrictions
→ Easy to scale quickly
→ Appeals to Gen Z and Millennials
→ Easy to maintain productivity remotely

> I've always thought this is where we'd be going. We've been building technology around remote call centers for a long time. Now that we're seeing how effectively it can be done, I certainly think that this will change the landscape. I genuinely think that a lot of call centers won't go back into the office.
> —Heather Griffin, SVP Inside Sales, Momentum Solar

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Customer Success Story with Remote Agents

Our Customer

Digital Market Media [DMM] is a successful inbound call generation company serving clients in multiple industries by providing their sales teams with a steady stream of qualified prospects. Their call center is a remote operation, so their agents work from home.

Challenges Before Convoso

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 Director of Operations, Kyle Andersson. 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

Customer Results

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

- Contact rate surged from 7% to 20-30% Critical DMM KPI, lead to transfer rate, steadily increased from 2% to 8% for significant ROI impact
- Doubled agents from 15 to 30 in two months
- Previously unavailable automated management reports with real time analytics saves an hour a day.

digital market media

>300%
Increase in Contact Rate

400%
Increase in Transfer Rate

5

WFH Call Center Checklist

Is YOUR remote call center set up to maximize profitability?

Tech Set Up

✓ Dedicated computers

✓ Webcams

✓ Headsets [echo cx]

✓ Browser-based software with multiple outbound dialing modes, prioritization for inbound dialing, and built-in dynamic scripting

✓ Stable Internet [ethernet cable]

Keys to Profitability

✓ Real Time Reports

✓ Historical Analytics

✓ Communication Tools

✓ Accountability Tools

✓ Agent Support Tools

Management Success

✓ Communication Plan

✓ One-on-one's with leadership

✓ Agent Recognition

✓ Activities to build connection

✓ Incentive Comp

✓ Career Program

Keeping it Legal

✓ Remote Work Plan

✓ Risk Assessment

✓ Mitigation

✓ Dialer Compliance Safeguards

✓ State Calling Restrictions

Convoso's Customer Success Team Is Here to Help

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Convoso's intelligent reporting features allow me to efficiently manage our at-home agents and have been critical to increasing agent productivity.
—Tom Carolan, Owner, Digital Market Media

Convoso supports many remote outbound call centers, helping to optimize their virtual dialers for profitability, and access the tools to manage productive at-home agents.

Convoso's cloud-based solution is built with flexible, advanced technology that allows you to smoothly transition your agents to work from home.

How can we help you operate a more profitable remote call center?

Digital Market Media is a successful virtual call center. Owner Tom Carolan, author of the book, "Have Them at Hello: How the Best Call Centers Crush Sales Projections," reported that within 3 months of switching to Convoso, they were more effectively managing agents with previously unavailable tools, saving time and money, and doubling the size of the team.

Acknowledgements

We're grateful to our customers and colleagues who contributed their extensive knowledge and in-the-field experience managing profitable remote call centers so that we could produce this valuable guide.

We'd like to especially thank Heather Griffin who appeared as a speaker on our first Work From Home Webinar, How to Effectively Operate A Work From Home Call Center. Heather is a remarkable resource on the efficiencies of running outbound call centers.

Heather Griffin is SVP of Inside Sales with Momentum Solar. She has had extensive experience managing medium and large-sized call center operations, including multi-state call centers and offshore call centers. She has helped many transition to remote operations and has also worked as a consultant to numerous call centers. She is an expert in optimizing the efficiency and productivity of at home agents.

CHRIS ROBINSON, President of Ascent Mortgage Group

GEORGE MUELLER, VP Sales & Operations, NextGen Leads

MELVIN MERRITT, Call Center Director, NextGen Leads

TOM CAROLAN, Owner, Digital Market Media

KYLE ANDERSSON, Director of Operations, Digital Market Media

MICHELE SHUSTER, Partner, MacMurray & Shuster LLP

LISA MESSNER, Partner, MacMurray & Shuster LLP

CHRIS CANTRELL, US Health Advisors

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About Convoso

Request a Demo

Convoso is the leading innovator of cloud-based omnichannel contact center software. Our call center customers report dramatic increases in contact rates of 30% and more, giving them higher conversions and significantly improved ROI.

The Convoso system works best with 10 or more seats, and scales efficiently to over 1000 seats to meet enterprise level requirements.

See for yourself with a live demo how Convoso can help to boost the productivity of your virtual contact center.

convoso.com
info@convoso.com
(888) 456-5454

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