

Contact Center Work-From-Home Checklist



Tips to ensure your contact center is all packed and prepared for their work-from-home journey

1. Set requirements for a suitable workspace

Agents should have a dedicated, distraction-free workspace complete with desk and chair. You'll want to pay attention to the ergonomic requirements in your state to ensure the agent workspace is compliant. Depending on the frequency of working from home and availability of a dedicated space, you may need to adjust on a case-by-case basis.

2. Equip agents with the right technology

Ensure agents have the tools and technology for consistency between office and home. Essentials include a computer, keyboard, mouse, monitor(s), webcam, headset, and internet connectivity optimized for voice and video quality; it's a good idea to specify minimum internet speed. Agents need a unified desktop for all interactions, with embedded collaboration via audio, video, and screen sharing.

3. Craft work-from-home guidelines

Create a robust policy statement that proactively addresses areas such as technology, expenses, qualifications for participation, HR and legal aspects. Seek input and gain approval from key stakeholders in your company. A policy statement should be a living document, so include a clause that it is subject to change. Revisit and update as needed, communicating any changes with the team.

4. Clearly define what expenses are paid by whom

Agents may be required to provide their own workspace, chair, desk and internet connection. The company should typically provide a laptop computer along with peripheral equipment and essential software that agents need to do their job. Also consider other expenses such as postage, shipping costs, and office supplies.

5. Meet security requirements

Consult your Chief Information Security Officer to ensure compliance with regulations including HIPAA, PCI, and more. There should be strict policies and precautions taken when agents are processing payments, personally identifiable information (PII), or handling personal health records. Require a secure VPN to access company resources and employ best practices for passwords and home network security.

6. Determine how you will train and develop agents

Plan for both new agent onboarding and ongoing training. For new hires, determine if training is initially at an office or exclusively remote. A meeting platform with audio, video, and screen sharing is essential. Live voice and screen monitoring allows new agents to shadow more experienced agents before interacting with customers themselves.

7. Clearly define metric targets

Now more than ever, your company needs to deliver a customer experience that fosters loyalty. Define both productivity and quality metrics for your contact center with a continued focus on measuring success. Since work-at-home agents can't keep an eye on wallboards, give them access to the real-time metrics that matter.

8. Provide regular performance feedback and coaching

If this is the first time your agents have worked from home, they may be challenged to ignore distractions and give customers their undivided attention. Tools like Speech Analytics and Quality Management help quickly identify any opportunities for improvement as well as successes. Continue coaching face-to-face by using video.



9. Keep your team dialogue going

Continue holding regular team meetings where you encourage agents to discuss their struggles and successes in adapting to a work-from-home environment. Video meetings can foster camaraderie and help your team feel less isolated. And, it could encourage agents to carve out a workspace that is video-ready and noise-free.

10. Foster a “we’re in this together” culture

Be sure to build a spirit of teamwork and inclusion with your work-from-home agents — sprinkle in a little fun along the way. Whether you host a lighthearted video meeting, send an unexpected piece of company merchandise, or offer a word of encouragement, these actions serve to build cohesion among the team and keep morale high.

For more information, call [1.866.879.8647](tel:1.866.879.8647) or visit [8x8.com](https://www.8x8.com)

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