



10 steps to take when setting up your remote contact centre

The question of how to set up a contact centre – and, in particular, a remote contact centre – can broadly be broken down into three focus areas. This paper explores them and how they relate to your organisation.

The three main areas you'll need to focus on are:



Software
requirements



Hardware
requirements



Personnel
requirements

Within each of these there are a number of things that it's important to get right, and each area will inevitably have some crossover with the others too, so it's a good idea to think about the big picture first before getting stuck into the details.

As a Twilio partner, all of these tips are relevant to Twilio's cloud communications platform – but also the advice applies whatever tech stack you're using.

Here are 10 things to have in mind as you set up your remote contact centre.



Software requirements

With so many options out there, getting the right software for your contact centre can feel overwhelming.

However, the flipside to this is that once you have a clear idea of what your business needs, it's possible to find a solution that's just right.

1 Cloud-based solutions are the way forward

A simple IVR (interactive voice response) can help guide a caller to the correct department, enabling them to get the answers they need.

By configuring options based on pressing buttons on the number pad, callers can choose their desired destination with the call routing through.

2 Think long term, think omnichannel

If you're thinking long term about your new contact centre (or remote contact centre upgrade) then you need to be confident that what you're building can sustain you into the future.

Your platform needs to be able to scale. But in this instance 'scale' doesn't simply mean 'get bigger' – it means adapting to the new ways in which your business is communicating with its customers.

Take live chat, for example. Live chat (sometimes referred to as webchat or live messaging) is overtaking traditional customer contact options, and agents are increasingly expected to respond to queries across multiple channels.

Your contact centre needs to be able to grow into this reality, so omnichannel is a must.

3

Security remains paramount

The value of added peace of mind when embarking on big changes shouldn't be overlooked.

Not only will you want to know that things like call recordings can be accessed from any location at any time, but you'll need to be confident that your remote setup remains safe and secure too – including when agents are working off home networks, for instance.

With the right contact centre provider, data security should be a given.

An area that we see becoming more important in future is voice recording encryption, which is also supported by Twilio.

4

Take your next steps with confidence

It's becoming increasingly clear that cloud-based solutions are the future of contact centre operations – whether you're operating remotely or not.

Many organisations will have already begun the transition to using more digital services, and are perhaps experimenting with different platforms and processes to see what works best for them.

Now is the time to ensure that a secondary transition – which represents a bigger commitment, and involves moving beyond siloed trials or beta test stages – is the right one and includes the platform that best meets the specific needs of your business.



Hardware requirements

With the right cloud-based platform in place, hardware needn't be a headache – provided you get the following elements right.

5

Standardise where possible

If you're starting from scratch, then aim to have standardised hardware – including laptops, headsets, monitors and so on – across your business, wherever possible.

This will make configuring your platform easier, and fixing any gremlins that might crop up will be more straightforward too.

Of course, this is a best-case scenario and won't be possible for most businesses: plenty will have some legacy hardware already in operation, and many won't be in a position to spend money on a complete re-kit of their organisation.

In which case...

6

If you can't standardise, then audit

A full, detailed audit of what gear you currently have in the business will not only provide you with a clear indication of what you might need to buy in, but it'll be key to making sure you configure your software platform to work uniformly for everyone in the business too.

You'll want to be able to access the full suite of contact centre tools on screen all at once. Think of this as a 'single pane of glass' view. But it's only possible to do this if you know what screen size every employee has access to.

So: audit.



Allow time for the procurement process

Any audit will of course show up areas where you're lacking the right gear, so inevitably there'll be things you need to procure.

For example, if you're moving from desk phones in an office to softphones that colleagues can use from their laptops at home, then chances are you'll need to order in additional compatible headsets.

When planning this, bear in mind that it's highly likely that you won't be the only business making a shift to more remote working – and that, as a result, global demand for headsets is particularly high at the moment.

With this in mind, it's important to make sure you allow enough time to procure the kit that you need.



Personnel requirements

Moving from a centralised contact centre setup to one that's remote will have a significant impact on your employees, so it's important that you're bringing them on the journey with you.

8 Instil confidence, and reward intuition

It goes without saying that a shift from working in a physical, office-based contact centre to one that's remote and distributed across multiple locations is a significant one – and not just from a technical point of view.

Managing this change to ensure that agents and other employees feel comfortable and confident with the new setup is of utmost importance, both in terms of any unfamiliar software or hardware they may be using and the different ways of working that they'll be adjusting to.

To make this process as smooth as possible, any new working processes should be designed to be as intuitive as possible – and, taking a cue from your call deflection techniques perhaps, should include self-service options that employees can use to teach and guide themselves through any difficulty they might encounter.

9 Support your staff

It's not enough to expect agents and other employees to be able to work out all aspects of this big change for themselves.

Part of enabling – and normalising – a new remote working setup will involve supporting your staff through the process.

Features such as Twilio Programmable Voice APIs Listen, Whisper, or Barge actions – and the agent's ability to request them direct from their screen while on a call – allow staff to feel the support of their colleagues without necessarily being in the same place as them.

10

Keeping sight of your key metrics

In an office environment, it's easy enough to display performance dashboards and other key metrics on a wall that's visible to everyone. Replicating this within a remote setup can be one of the bigger challenges involved in setting up a remote contact centre.

There's no reason why you can't host the same dashboards online and track progress that way, but it's difficult to know how often they're being viewed – and requires building a new habit of checking in on them too.

One possible option here is to conduct casual group sessions throughout the week where everyone is invited to check in on the team's progress together, via video call.

As well as making sure everyone is staying on top of key measurements like call duration, making this something that everyone shares in will help bring some of the cultural aspects of the traditional office environment – camaraderie and collective encouragement, for instance – into the online sphere too.

Let's start a conversation...

If you are looking at implementing a remote or multi location contact centre and need help or advice on any of the elements described above, get in touch – we'd love to start the conversation with you.



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