



# A distributed operating model for customer service

A brief for CFOs, COOs and CIOs on the opportunities, risks and strategic implications.

The lockdown – as well as the prospect of recurring lockdowns – has strengthened the case for a distributed workforce model, also known as work-at-home (WAH). It has obvious business continuity benefits, but C-suite executives continue to grapple with justifiable concerns around data and information security, technology and operating model.

This guide aims to provide a concise briefing for CFOs, COOs, and CIOs looking to transition their customer service operations to a distributed model – both over the short term to minimise disruption to their operations, and over the long term to drive strategic benefits.

While the business continuity benefits of a distributed workforce are obvious in the wake of the pandemic lockdown, there are several other aspects relevant to decision makers:

- The underlying technology for WAH is tried, tested and secure. A robust combination of existing technology such as good broadband connection, thin-client (dongle) technology that plugs into a monitor and connects to the cloud, and collaboration software, such as Microsoft Teams, forms the foundation.
- The challenges relating to managing people, performance, quality and SLAs, can be addressed with proven remote workforce management and performance solutions.



Your SLAs won't suffer – actually, they're more likely to improve. Research shows that remote workers are more productive due to higher levels of work-life balance and satisfaction.

- Beyond business continuity, the two other main benefits are access to a broader labour pool and greater agility in workforce management.
- If your customer service calls do not involve handling credit card or bank account numbers, consider moving at least a part (up to 30%) of your workforce to WAH. This way you'll have the infrastructure and processes in place to move more staff to the WAH model, in case of a further waves of coronavirus lockdowns.

- If your customer service calls involve handling credit card or bank account numbers, the technology challenge is slightly harder but still solvable. The solution involves complying with PCI DSS mandates and deploying security monitoring systems that combine the power of AI with human view.

**This brief begins with the three main benefits, and then considers the three main risks and challenges of a distributed workforce and how you can overcome them.**



# Top 3 benefits of a distributed operating model





## Benefit #①: Business continuity planning

Before the lockdown, a typical Plan B for ensuring business continuity involved operating contact centres in multiple locations and switching volumes between them as needed. Most businesses considered the WAH model a nice-to-have Plan C.

But companies that had the WAH model in place prior to the pandemic are now enjoying the benefits, as are their employees and customers.

McKinsey foresees the pandemic crisis playing out in three waves. In **Wave 1**,

businesses must aim to ensure stability and business continuity by mitigating the impact of the crisis. In **Wave 2**, they must look to institutionalise new ways of working and in **Wave 3**, use the lessons from the pandemic to prioritise digital transformation for sustained resilience.

We recommend businesses implement a distributed workforce for a portion (say 15-30%) of their customer service operations in Wave 1. Doing so will mean the technology infrastructure, processes and people management activities

are all established and refined, making it easy to roll out to the rest of the workforce quickly and institutionalise the model under Wave 2.

One of our clients had over 50% of their customer support staff working from home, and we helped them move 100% of their staff to WAH within a week of the Covid-19 lockdown.



## Benefit #2: Access to wider labour pool

Consider your largest contact centre or a centre with the biggest staffing problem. How many people are within commuting distance of that centre? 300,000? 500,000? 700,000?

With a distributed workforce, you can access the entire labour pool in the country. In the UK, this is 43 million.

What's more, this 43m includes:

- People who can't or wouldn't come into a contact centre: mothers or fathers with childcare responsibilities, those in rural areas, students who want to do three-hour shifts and so on.
- People with highly specialised attributes or skills, for instance, highly empathetic people for emotionally demanding work or people skilled in different languages.

## Benefit #2: Access to wider labour pool

Our experience shows that a distributed model allows employees to better balance their lifestyle, leading to higher satisfaction, productivity and loyalty – generally a few percentage points higher on efficiency and effectiveness compared to onsite workers.

Given that employment in the UK is at a 45-year low, this is reason enough to implement WAH.

A distributed workforce model allows you to hire from up and down the country.

The team members for one of our clients: where they all live. >>





## Benefit #③: Workforce management agility

People working from home are more willing to:

- Work longer shifts to help you staff peak periods.
- Split shifts, for example, do three hours in the morning and three hours in the evening.
- Agree at short notice to work three hours because you are over-capacity.

Moving 15%-30% of your Customer Support team to a distributed workforce model increases your operational agility and offers a wider range of options for dealing with the unexpected. Your customers are less likely to wait 5-10 or even 15 minutes to speak to an agent. They are less likely to hang up. What's more? You are less likely to find yourself with too many agents on a shift.

“When [our telco client] has a service outage, volumes surge. We ask people to start their shifts earlier or work an extra one. They're very responsive like that – the general attitude is 'no problem'.”

- Firstsource Team Leader



# Top 3 risks of a distributed workforce and how you can address them



# Risk #1: Keeping customer and other sensitive data safe

Ensuring the same level of customer data security as an in-centre solution is a top concern for C-suite executives. While poor security protocols around remote working can result in serious consequences, the majority of the risks are human: lack of awareness around safe practices, use of unauthorised tools or a family member accidentally hearing or seeing something.

How to address this challenge:

## i) When you are not handling credit card or bank account information

- Conduct a comprehensive background assessment of the candidate and supplement it with a thorough assessment of the physical workspace that agents will be working from. Ideally, the physical workspace must include a private working area, fast, stable and secure internet connection, hardwired phone line, safe and secure storage for equipment and documents and so on. It is also a good idea to have all WAH employees sign a WAH-specific agreement.

- Analyse training needs and offer remote training on your brand, products, processes, and security covering aspects such as – compliance, confidentiality, equipment standards, IT processes and SLAs. Training can take several forms: flexible online training modules, live coaching and online breakout sessions for individual or groups, as well as experiential learning options such as scenario-based training and on-the-job training.



Risk #1:  
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How to address this challenge:

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In addition to background checks, assessment of agents' physical workspace and agent training, deploy a security monitoring system that leverages both AI and human review to identify suspicious or unusual activity in the contact centre. Such systems can be customised to your business-specific environment. In addition, enable PCI accreditation to ensure highest degree of data and information security.



## Risk #2: Choosing the right technology

Using technology that works well in a remote setup is key to success. This means identifying a tools and technology landscape that is not only secure but also fully adaptable to your existing architecture.

### How to address this challenge:

- Your WAH technology landscape must ideally include a cloud-based solution for workflow management, cloud-hosted servers for managing data workloads, and a VPN solution with dual factor authentication for agents to securely connect to the cloud.
- Enable BYOD options along with multi-channel capabilities across chat, video, audio and social media to drive omni-channel customer engagement.
- Activate remote end-use monitoring and analytics for performance tracking and productivity management.
- Create a phased roll-out plan with a dedicated support team of tech engineers and team leaders to manage IT support requests during the transition period.



## Risk #3: Ensuring quality and SLA performance

A successful distributed workforce model requires a robust end-to-end virtual solution across the entire employee lifecycle – recruitment, training, performance management and engagement.

### How to address this challenge:

- Use technology-based platforms to optimise sourcing mix across referrals, recruitment call centre, social media recruitment and job boards.
- Enable competency-based online assessments, video interviews and induction.
- Digitally enable training using train the trainer initiatives and remote training across customer experience, your products and processes, and regulatory aspects.
- Leverage collaboration platforms such as Microsoft Teams to create avenues for experiential learning such as scenario-based or on-the-job learning.
- Tap into employee surveys, online engagement forums, rewards programs, learning and development, and career progression to amplify employee engagement.
- Finally, assess performance for continuous process improvement and leverage highly skilled operations professionals to optimise performance.



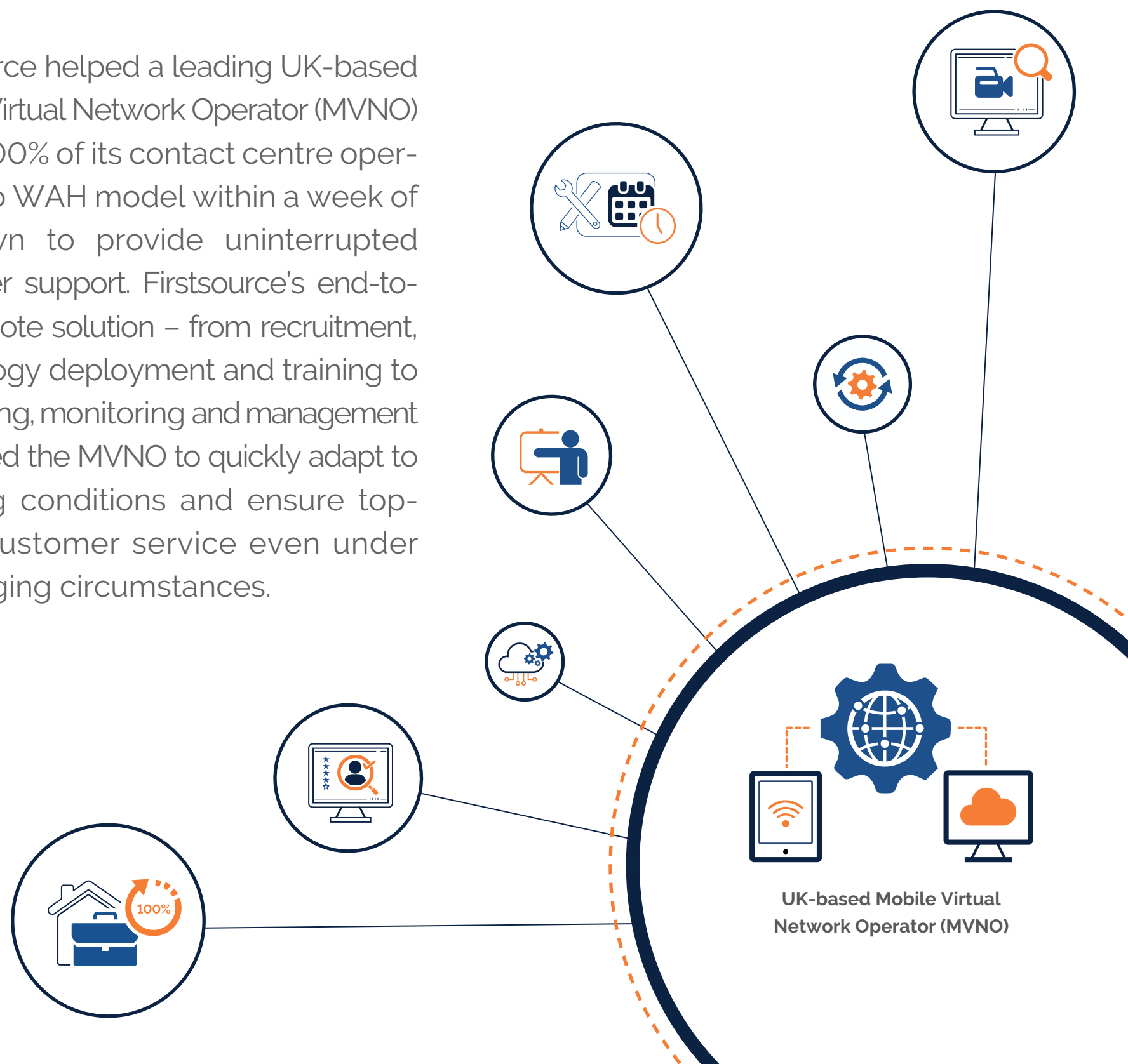


# Building resilience: Preparing for the future



Embracing a distributed workforce allows you to drive productivity while boosting employee safety and satisfaction in the new normal. Bringing together the right distributed workforce elements can help you create a new way of working that will not only help your company navigate the current volatility but also make it resilient enough to tackle whatever the future holds. An experienced vendor can help you achieve a successful distributed workforce deployment within tight timelines (less than two weeks) while driving high levels of employee motivation and maintaining CSAT and quality at BAU levels.

Firstsource helped a leading UK-based Mobile Virtual Network Operator (MVNO) move 100% of its contact centre operations to WAH model within a week of lockdown to provide uninterrupted customer support. Firstsource's end-to-end remote solution – from recruitment, technology deployment and training to scheduling, monitoring and management – enabled the MVNO to quickly adapt to evolving conditions and ensure top-notch customer service even under challenging circumstances.





To learn more about how Firstsource can help you seamlessly transition your contact centre support operations to a distributed workforce model for success over the short as well as the long term, visit [www.firstsource.com/WAH](http://www.firstsource.com/WAH).