



How to Build High-Performing Remote Teams

Leading organizations share actionable best practices for transitioning to remote sales and service teams.



Brought to you by **CRESTA**

■ Overview

In the last decade, online retail spending has surged, supporting a retail industry that has struggled to remain relevant to shoppers and their technology-enabled shopping journeys. According to the U.S. Department of Commerce, in 2019, consumers spent \$601.75 billion online with U.S. merchants, up 14.9 percent from the prior year, and a total that represented 16 percent of total retail sales. The prevailing trend clearly illustrated retail growth was swinging from brick-and-mortar stores to online e-commerce sites.

Then, in 2020, the novel coronavirus/COVID-19 pandemic firmly, and perhaps forever, swept the pendulum to online retail.

In the second quarter of 2020, U.S. e-commerce sales soared a record 44.4 percent, and more than \$1 of every \$5 was spent online, the highest e-commerce penetration on record. It's clear the pandemic has accelerated changing consumer behaviors, and in many cases the changes appear to be permanent.

With physical store traffic less than half what it was a year ago, the current retail environment presents a golden opportunity for those organizations prepared to handle increased online volume.

Since early in the pandemic, Shopify, the primary online platform for many organizations, has experienced what its CTO, Jean-Michel Lemieux, described as "Black Friday-level traffic every day."

As we help thousands of businesses to move online, our platform is now handling Black Friday level traffic every day! It won't be long before traffic has doubled or more.

Jean-Michel Lemieux – CTO at Shopify
Apr 16, 2020



Furthermore, according to Salesforce, 30 percent of all holiday shopping in 2020 will be conducted online due to the COVID-19 pandemic.

This means all team members, procedures, processes and systems for online retailers must be leveled up to not only meet demand, but to succeed in an increasingly competitive marketplace. As site traffic and sales go up, increased demands are placed on an organization's infrastructure, including its supply chain, fulfillment and shipping functions, and contact centers. In fact, another recent survey from Salesforce found a 30 percent increase in the number of consumers reaching out to contact centers over the span of just a few months.

With consumers flocking to digital channels, customers are now interacting with remote teams rather than store associates. This eBook provides the insights, lessons learned, and the tested best practices from leading organizations to empower your remote teams to successfully address customer demand and proactively capture sales.

Table of Contents

INTRODUCTION

Helping Agents Handle Increased Customer Demand	4
Transitioning to Remote Operations	5
Overcoming a Remote Team’s Biggest Coaching Challenges	6

BEST PRACTICES FOR BUILDING HIGH-PERFORMING REMOTE TEAMS

Maintain Coaching Cadence and Speed	7
Ensure Agents are Engaged	8
Leverage Remote Training Processes and Tools	9
Emphasize Onboarding	10
Document Activities	11
Establish Personal Relationships	12

PATH TO REMOTE TEAMS

The Next Steps	13
----------------	----

ABOUT CRESTA

14

Helping Remote Teams Handle Increased Customer Demand

With large increases in customer call and chat volumes, it's become mission-critical for brands to enable and support their remote teams' customer interactions.

In a competitive, global marketplace where two poor customer experiences lead to a 96 percent probability in permanent customer churn, it's necessary to make every customer interaction count.

Adding to the challenge for contact center managers is an industry shift to remote contact centers, both in response to pandemic precautions and efforts to increase capacity. In its report, "Work-at-Home Customer Service Model is Holding Up Now, But Dark Clouds are Forming on the Horizon," J.D. Power, reports 86 percent of organizations are planning on a permanent work-from-home model.

Organizations must empower their teams to be successful while remote. If leading and managing agents was difficult before in an on-site location, those responsibilities are now downright daunting.

86 percent of organizations are planning on a permanent work-from-home model.

J.D. Power



Transitioning to Remote Operations

Being responsive to changing consumer shopping behaviors means building out new platforms and processes, repurposing key assets from brick-and-mortar stores to digital shopper touchpoints, particularly those prized top-performing sales associates.

As Laurence Levin, Senior Director, Customer Relationship Services and Sales at Sleep Number, said, “We knew we had to quickly retrain our retail associates so they could help manage surging online demand.”

We knew we had to quickly retrain our retail associates so they could help manage surging online demand.

Laurence Levin
Senior Director
Customer Relationship Services and Sales
at Sleep Number

However, it’s not a simple process to take in-store sales associates and repurpose them effectively in a digital environment, either for the individual or for the organization.

Remote contact centers require rethinking operations, from the hardware configurations of remote employees to the cloud-based platforms upon which they interact with colleagues and customers; and from the training and coaching tools to the metrics used to manage and and measure sales, productivity and customer satisfaction.

One of the more difficult aspects of the new remote contact center environment is the effective coaching and training of customer care agents. In a survey interview, Chris Irwin, Sales Manager at Intuit, said, “**Managers are spending half their weeks reviewing call and chat manuscripts.**” Furthermore, 56 percent of call center leaders feel detached from the frontline. As a result, organizations need to ensure contact center teams are equipped to effectively resolve customer inquiries and capture upsell and cross-sell opportunities.

With contact centers being the only remaining customer touch point, onboarding, training, and coaching contact center agents should be management’s number one priority.

Overcoming a Remote Team's Biggest Coaching Challenges

In a remote contact center, there is a lack of visibility across phone and chat interactions, inadequate coaching coverage, and a lack of agent support that has negatively impacted agents' effectiveness and ongoing development. Much of this stems from the fact that in a remote work environment, managers no longer have physical, in-person access to agents.

Kathleen Preseton, Director of Digital Marketing and Sales at Cox Communications, put it best when she said, "Our retail stores were closed and our live support teams were remote, so everyone turned to our digital channels." Without physical access, organizations need new approaches to facilitating visibility and communication between front lines and managers.

For example, if all a manager receives is an occasional recording of a 30-minute call with a customer, it becomes extraordinarily difficult for leadership to get an accurate view of team performance and customer satisfaction.



Our retail stores were closed and our live support teams were remote, so everyone turned to our digital channels.

Kathleen Preston

Director of Digital Marketing and Sales at Cox Communications

It becomes almost impossible to "read the room," and as a result, valuable insights are lost.

Fortunately, lessons learned from some of the world's best-known brands and early movers to remote contact centers provide a roadmap of best practices for those fast-following organizations. From a thorough assessment of interviews and surveys, Cresta has identified six tips to help guide you through an effective transition to a remote contact center.

Maintain Coaching Cadence and Speed

In a physical contact center, whenever a manager identified an opportunity to coach, she simply walked over and coached. In fact, access was so simple, she provided coaching to both small and large groups easily and effectively. Chris Irwin, Sales Manager at Intuit, mentions “Anyone who has to be a coach knows one of the biggest challenges is consistency.”

In a remote contact center, however, coaching becomes much more difficult. Virtual one-to-one coaching sessions are difficult to schedule and coordinate and less effective than in-person sessions.



Anyone who is a coach knows one of the biggest challenges is consistency.

Chris Irwin
Sales Manager at Intuit

New considerations for virtual coaching include:

- **Create and give all agents access to a “war room,”** allowing for active group discussions and problem-solving
- **Make subject matter experts (SME) available** to more quickly answer product and process questions a manager would ordinarily address
- **Establish an “Agent Escalation Desk”** where an agent can immediately get assistance without having to wait to speak with a manager
- **Train and empower for autonomy** by using collaboration software in defined situations
- **Encourage** your bench to flex its creativity in solving problems
- **Align agent and supervisor shifts** so there is in an overlap to foster direct communication

In order to efficiently allocate a manager’s limited time, it’s necessary to develop effective coaching solutions that scale in a remote work environment.

Ensure Agents are Engaged

Using technology solutions in a virtual world, it's often difficult to determine if an agent is fully engaged, listening, learning and utilizing new information. A manager can request access to an agent's screen, but that action usually feels like micromanagement to both parties.

A better approach is for managers to ask for evidence of follow-through, a technique that provides insights into what representatives have learned.

Open-ended questions to ask remote employees:

"Describe what you've learned from our last chat."

"How have you changed your approach to how you address customer calls?"

"What have you been able to incorporate into your customer calls, and what have been the results?"

"What have you learned that will help you going forward, and what's important to share with the rest of the team?"

"What difficulties are you continuing to encounter?"

"Where do you need additional training, tools and resources?"

A key component of development in the contact center is an after-action review of the call that just happened. Engage your agents with the call/chat data that uncovers actionable insights that can be immediately applied. Data-backed reviews also build trust between managers and agents.

Leverage Remote Training Processes and Tools

Coaching for ongoing development in the contact center should include tools and methodologies for their effective use. In the past, most coaching was conversation-based and done in-person, and one of the most effective means of teaching was physically sitting an agent directly next to a group of high performers, allowing the agent to learn from the very best. In fact, Cresta has seen agent performance vary by as much as 30 percent based on seat location alone!

In a remote contact center environment, it takes ingenuity and creativity to accomplish the same transfer of expertise, and managers should not only coach to the quality of an agent's calls or chats, but also coach to the proper use of tools and software.

Recommendations for accelerating employee workflows:



Arranging on-screen work windows to maximize time with the customer



Using hotkeys to maneuver quickly between multiple open apps



Managing internet, intranet, and wiki bookmarks as reliable resources

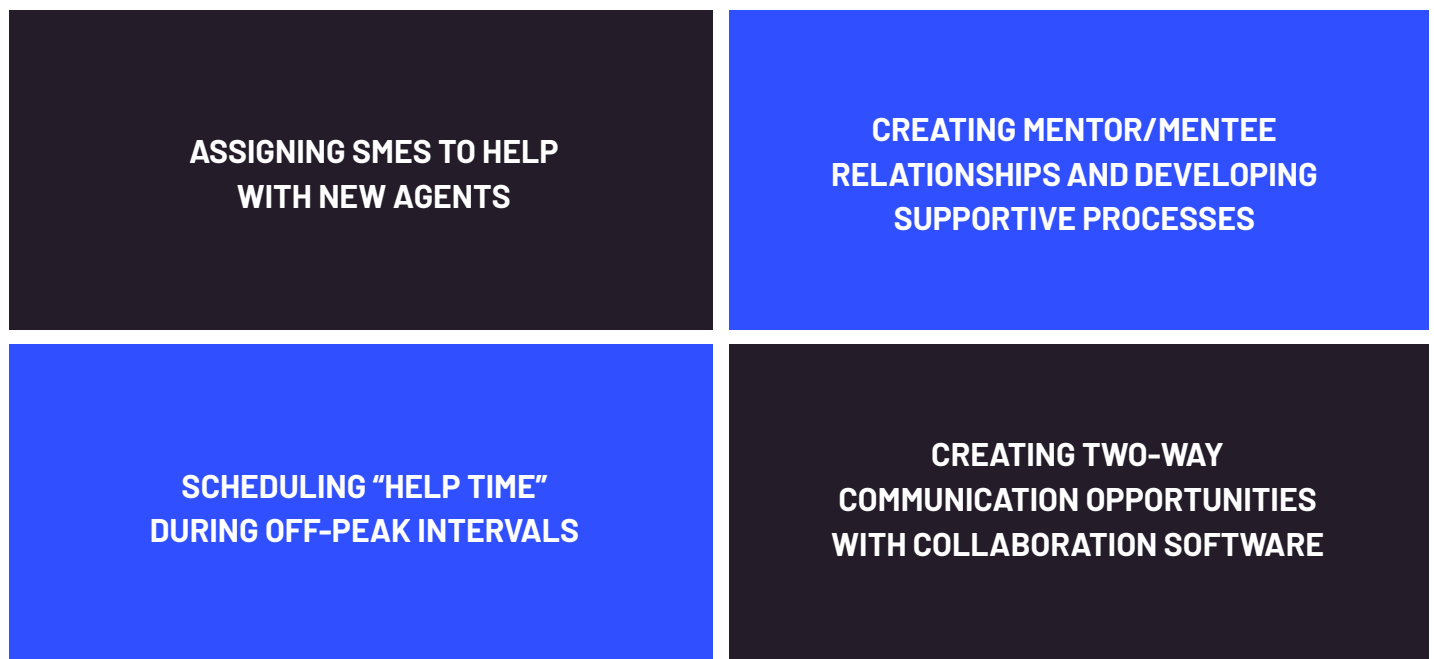
Build out the toolkit for remote contact center agents and develop mechanisms - through training, processes and/or systems - to ensure they are supported during customer interactions.

Emphasize Onboarding

The explosion in e-commerce results places an ever-increasing load on support processes, especially sales and customer care and contact centers. Brands are responding in turn by increasing contact center staffing, and whether new agents are being reallocated from brick-and-mortar stores or staffed from outside the organization, the new remote work environment places a newfound emphasis on onboarding and training.

Perhaps the largest limitation in the remote contact center is the ability for supervisors and coaches to visually observe and listen. Those informal and ad hoc opportunities must now be replaced with very purposeful onboarding tactics.

Remote onboarding best practices:



It's unavoidable - all contact center managers will spend more time onboarding due to the more difficult process of transferring expertise to new team members. Effective knowledge transfer is mission-critical in resolving customer problems, increasing conversion and driving incremental sales.

Document Activities

In a physical contact center, a manager often found herself walking the floor, observing agent/customer interactions and listening for opportunities to coach and counsel. In the remote contact center, however, that walkaround time has been replaced with listening to and reading transcripts, and the real-time, coach-in-the-moment opportunities have become a thing of the past.

Going forward, it's imperative for managers to record all virtual coaching sessions so they can easily be referred to later. The documentation must include:

- **CALL DATA AND PERFORMANCE METRICS WITH CLEAR SOURCES**
- **CONCISE FEEDBACK ON AGENT PERFORMANCE**
- **CLEARLY ARTICULATED OPPORTUNITIES FOR IMPROVEMENT**
- **ACTIONABLE CORRECTIVE ACTIONS FOR AGENTS TO TRY**
- **A SHARED COACHING SPACE EASILY ACCESSIBLE BY BOTH THE COACH AND THE AGENT**

Lastly, it's a good practice to develop and implement processes to "review the reviewer." Consider implementing skip-level meetings to ensure director-to-agent coaching is effective, and to understand how supervisors and managers can further improve and be more effective.

KEY TAKEAWAY

CONSIDER IMPLEMENTING SKIP-LEVEL MEETINGS TO ENSURE DIRECTOR-TO-AGENT COACHING IS EFFECTIVE.

A culture of continuous improvement is built through transparent two-way communication that fosters teamwork, cooperation and follow-through. In a remote work environment, that culture of continuous improvement has to be built into on-screen processes.

Establish Personal Relationships

Lastly, it's not all about tools and processes.

Interpersonal interactions in a virtual environment are vastly different than those in the physical world, particularly manager and direct report relationships. To establish a culture of coaching and continuous improvement, it's first necessary to establish a good personal relationship, where each party understands one another on a deeper level. What's more easily done in a hallway, by the water cooler, in a break room or by a desk filled with personal items can be very difficult in the confines of a remote work environment.

Remote contact center managers need to be intentional with their non-work interactions with every direct report. Effectively managing someone requires an understanding of the whole person, including considerations around family, health care and other circumstances that affect an agent's life and possibly impact her work. Ideas to increase engagement and foster relationships run the full gamut, and include:

-
- **Scheduled and/or informal, unscheduled video call meetings with open agendas**
 - **Virtual team activities and contests, like trivia challenges**
 - **Public celebrations of both team and individual accomplishments**
 - **Dedicated time during team meetings to learn about team members and their lives outside work**
 - **Recurring themes, like "Meme Monday"**
- .. and much more.**
-

Time is at a premium for everyone, and it's difficult to carve out time for every critical task and appointment. It's now critical to identify and utilize systemic solutions that free up inefficient managerial time that can be better repurposed.

The Next Steps

The “new normal” requires immediate changes across the entire enterprise in order to meet consumer expectations and remain competitive. In the contact center, success in the new normal means reevaluating the organizational chart and utilizing a deeper, more skilled bench.

1. Evaluate the managerial span of control

Contact centers traditionally run very lean, with agent-to-manager ratios often hovering around 20:1. With a full shift of calls, agents are producing a wealth of performance data, and it requires hours upon hours of listening to recordings and reading transcripts for managers to identify coaching opportunities and then take corrective measures.

2. Identify and develop the next wave of coaches

Building bench strength in the contact center has never been so important. Creating groups that allow agents to act outside the role of only speaking to customers provides insights into the skills and capabilities of individual team members, as well as their interests and ambition. Allow your top performing agents to work on special projects, and take those key learnings to the entire team.

About Cresta

Cresta provides agents with personalized, real-time coaching during every customer conversation. Using AI, Cresta uncovers insights and coaching opportunities from customer conversations and automatically puts those insights into action with real-time coaching, producing measurable ROI in weeks.

Today, Cresta has a roster of Fortune 500 companies, including Intuit, Cox Communications and Sleep Number and has driven hundreds-of-millions of dollars in incremental revenue for its clients. Cresta is backed by world-class investors including Andreessen Horowitz and Greylock Partners.

GET IN TOUCH

pro@cresta.ai

Product Benefits

FOR MANAGERS

UNCOVER PERFORMANCE INSIGHTS

A single dashboard offers visibility into customer and agent behaviors and controls needed to actively close performance gaps.

- IDENTIFY PERFORMANCE DRIVERS
- TRACK COACHING METRICS
- UNDERSTAND CUSTOMER INTENT

The screenshot displays the 'Insights' dashboard with three main sections: Behavior compliance, Convo intent, and Receptivity. The Behavior compliance section features a table of performance metrics across Top, Medium, and Bottom quartiles, highlighting a 67% difference between the top and bottom quartiles for 'Handle objection'. The Convo intent section shows a spike in 'Email fraud' conversations, up 2.5x from last week. The Receptivity section shows a significant drop in hint receptivity for 'Handle Objection', down 24% since last week. Below these sections is an 'Agent insights' table and a 'Leaderboard' for compliance rate.

	Top	Medium	Bottom
Set expectations	94%	65%	43%
Uncover why	92%	58%	30%
Discover needs	97%	78%	48%
Assume sale	99%	82%	57%
Handle objection	73%	52%	6%

Agent	Insight	Date	Action
Kianna Pham	Mastered Uncover Why	03/24/2020	SEE DETAILS
	Compliance rate dropped for Handle objection	03/24/2020	
Ian Dejesus	Mastered Uncover Why	03/24/2020	SEE DETAILS
	Receptivity dropped for Uncover why	03/24/2020	
Phoenix Baker	Mastered Set expectations		

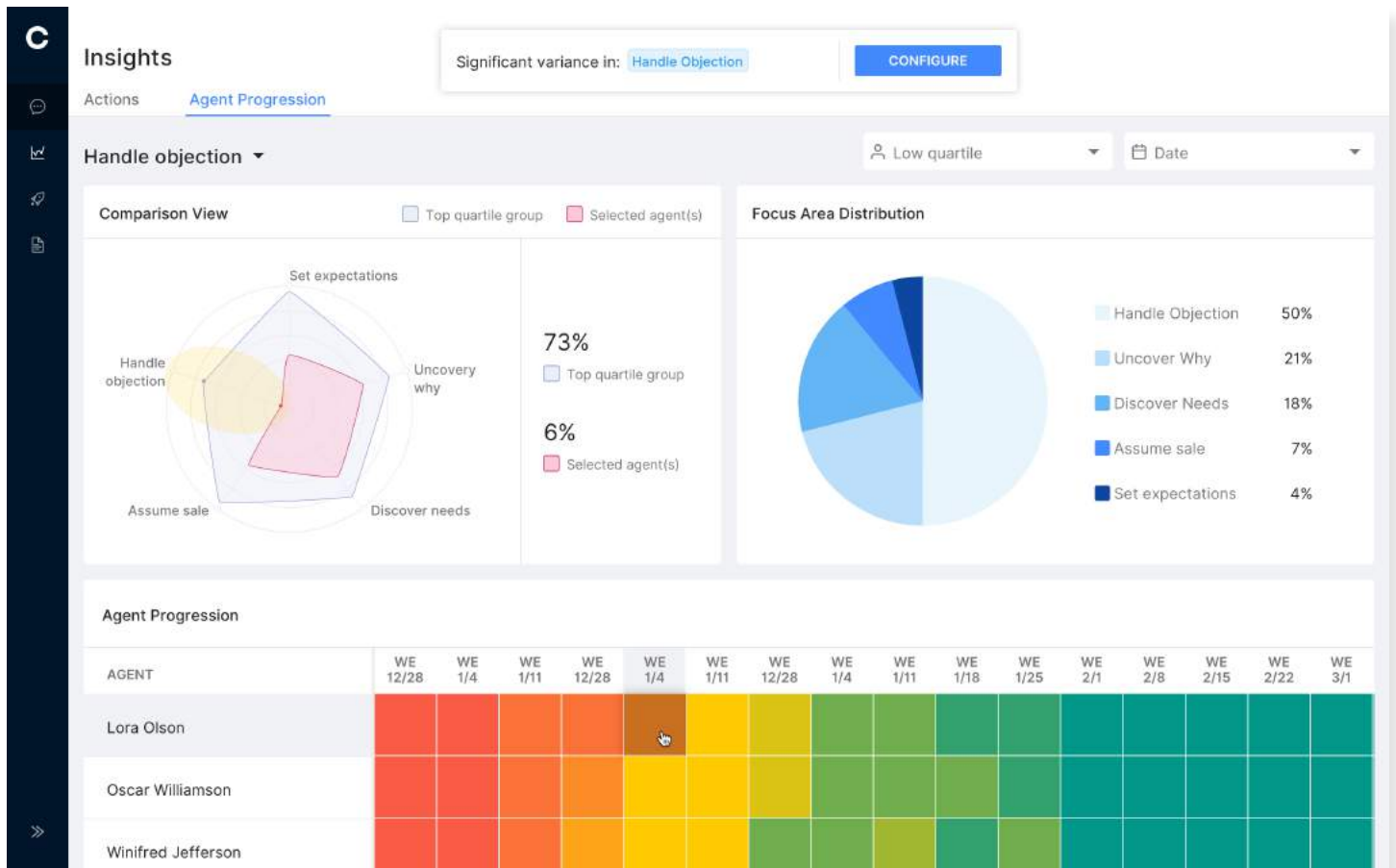
Rank	Agent	Compliance rate
1	Kianna Pham	92%
2	Akhil Newman	88%
3	Aatu Juntunen	87%
...		
63	Kari Rasmussen	16.2%
64	Joshua Mcnair	14.2%

FOR MANAGERS

ACCELERATE COACHING

Spend more time coaching and less time reviewing transcripts. Get insights from every customer conversation, monitor agent progress, and uncover opportunities for improvement.

- REVIEW COACHING PROGRESS
- DEPLOY AI-POWERED COACHING RECOMMENDATIONS
- TRIGGER COACHING OPPORTUNITIES

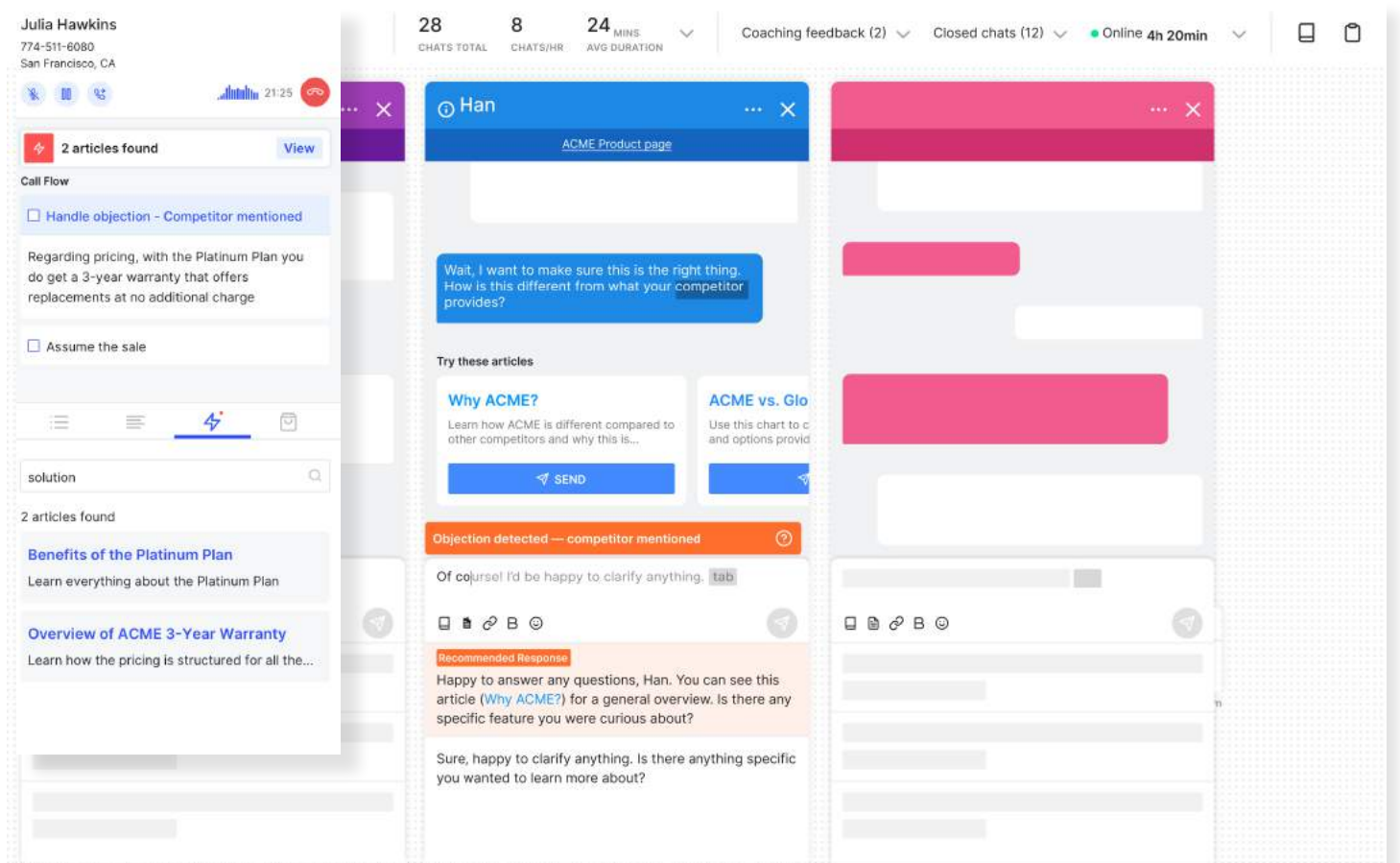


FOR AGENTS

REAL-TIME COACHING AND AUTOMATION

Close performance gaps and put coaching into action with real-time coaching that helps every agent perform like a top-performer.

- RECEIVE PERSONALIZED REAL-TIME COACHING DURING CONVERSATIONS
- RESOLVE QUESTIONS FASTER WITH KNOWLEDGEBASE AND PRODUCT CATALOG INTEGRATIONS
- REDUCE REPETITIVE WORK WITH WORKFLOW AUTOMATIONS





CRESTA

Copyright © 2020 Cresta Intelligence, Inc.