

CHECKLIST:

MANAGING WORK-FROM-HOME CONTACT CENTER AGENTS

Best Practices and Readiness Guide for Success

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INTRODUCTION

As your organization navigates potential emergency situations that force agents to work remotely, RingCentral is uniquely positioned to help you continue to work as a team to serve your customers even while they are working from home.

Our cloud capabilities allow agents to work from anywhere and still function as a cohesive team from a system management, agent supervision, and even customer standpoint. And with the collaborative tools available through RingCentral Office®, working from home

does not mean working in isolation for your agents. Use team messaging, calling, and video meetings to build connections and have those one-off conversations that are needed to solve the hard customer questions.

But having the software capabilities to route customer interactions to agents at home is only half of the preparation equation. Your contact center must also have a business continuity plan for other resources to make remote work a functional reality.

RingCentral Contact Center™ has prepared the following Remote Agent Checklist to help you prepare in the event your workforce is forced to work from home.



DEVICES, NETWORK, AND CONNECTIVITY

HARDWARE

Company-issued computers

Ensure your contact center procures enough computers and chargers for all agents who will be working remotely.

Laptop computers are ideal, but if you don't have enough laptops, consider dusting off some of those old PCs in your contact center's storage. While they have a large footprint and not the ideal solution, remind agents this will only be for a temporary period.

Ensure you have a mechanism to label and track the computers prior to distribution for asset control.

Agent personal devices

If your contact center does not have the ability to procure enough company-provided computers, identify if your agents' personal machines are a viable option for remote work.

Check with your Trust and Legal teams to ensure there are no customer data privacy concerns.

Check with your HR department to ensure this abides by local workforce policies and procedures.

The RingCentral Contact Center platform can be accessed from computers that meet platform requirements and have a browser to access the appropriate URL with a valid username and password. However, check that other systems that your agents need to access as part of their work can also be accessed from a non-company machine.

NETWORK

VPN/network access

If agents require the ability to access other systems and tools through your company's internal network, ensure that all computers have the ability to connect.

Logins

Ensure your agents know their username and password to log in to RingCentral Contact Center, RingCentral Office, and other systems.

While agents use these tools every day, agents may have forgotten their username and password, especially if your contact center usually uses Single Sign-on (SSO). Avoid any hiccups on day one at home by having all your agents reset their passwords if they have any doubts.

Internet support

Ensure that all agents have a high enough internet speed at their homes to support the use of systems needed to support your business needs. Ask agents to run a speed test using whatever machine they will be using at home prior to full-time remote work.

Hotspots: If your agents' internet speeds are not sufficient, consider procuring hotspots they can use. Pay to increase their speed or consider reimbursing them for the difference in cost to increase their speed through their internet provider.

Browsers: Ensure that all machines that agents will be using have the appropriate browsers downloaded. RingCentral Contact Center is supported via various internet browsers, but the integrated softphone is only formally supported via Chrome.

The unified interface for User Hub is only formally supported in Chrome.

Antivirus and recovery

Ensure both company and employee-provided computers have up-to-date antivirus software installed and processes in place to protect equipment from virus-related impact, as well as protect against malicious hijacking of information via malware.

Antivirus and recovery

Companies wanting to maintain and control remote employee applications may deploy applications using VDI.

From a general DR/BCP plan, it is wise to consider how remote users will impact existing use of VDI.

RingCentral recognizes this as a common practice; however, we don't formally support VDI environments nor is our Technical Support team able to diagnose, troubleshoot, or assist customers in enabling VDI for their remote users.

Ability to reimage

Inquire if your organization has the ability to image/reimage company-provided machines for remote agents. Ability to image/reimage can facilitate the rapid deployment of computer systems and help to support remote workers.

VOICE INTERACTION HANDLING

Train agents on different mechanisms to route voice calls.

RingCentral softphone

For work-at-home agents, it is generally best to use a softphone instead of a physical phone. RingCentral provides a Chrome plugin that greatly simplifies the agent experience using a softphone. If your contact center does not typically use softphones, ensure all your agents are trained before they start working remotely. It's very intuitive and easy to use, but it's best that they practice handling a couple of interactions while still on site.

Headsets

Ensure that all agents have functional headsets compatible with whatever company-provided or personal machine they will be using while working remotely. Have them test it with a peer to ensure they can be heard clearly and with good quality before they begin interacting with customers.

WORKFORCE PLANNING

Verify employee information

Ensure your agents' contact information is accurate and updated in your HR management or other system. Have agents double-check as soon as possible, including their emergency contact information. Once this information is verified, ensure that all managers and supervisors have an offline copy accessible to them without needing to connect to your network.

Access to workforce management and quality management tools

Set clear guidelines and expectations for your agents related to WFH activities, and ensure they can access any relevant workforce management and quality management software.

If you are using a RingCentral product, this should help make things easier, but if not, ensure your other solution is accessible from agents' at home machines.

Timecards and tracking

Set clear expectations and processes for your agents to clock their time while they are working from home. Make sure you have a process in place to track and manage agent time.

WORK-FROM-HOME BEST PRACTICES

Communicate work-from-home best practices to agents as most agents have never worked remotely before. This includes balancing the importance of both productivity and focus with the avoidance of work creep.

WORKSPACE

Dedicated workspace Create a dedicated workspace. Try to avoid working in your bedroom, if possible. This will help with work/life boundaries.

Ergonomic readiness Ensure agents inspect their home workspaces for ergonomic readiness. An ergonomically correct work area will help prevent injury.

TIME MANAGEMENT

Work hours Maintain your standard work hours as much as possible. Communicate with your supervisor if personal issues arise and you need to adopt a temporary change to your schedule.

Work with your HR department to understand any further guidelines that need to be communicated around this point if your agents are hourly employees (e.g., over-time concerns, labor union concerns, etc.).

Check your schedule regularly Ensure you are regularly checking your schedule. Schedules may change quickly if your peers and their family members fall ill and schedule adjustments are inevitable. Make sure you always know the most updated start time for the subsequent day before logging off in the evening.

If you are using RingCentral Workforce Management, this should help make things easier. However, if you don't and still rely on more traditional schedule distribution methods, a process that can be executed from home via spreadsheet, email, etc. will be important.

Breaks and lunches Take all breaks and lunches as scheduled.

Work with your HR department to understand any further guidelines that need to be communicated around this point if your agents are hourly employees.

Task prioritization Keep a task list. There are a lot more distractions at home than in the office.

PEER AND CUSTOMER COLLABORATION

- Customer transparency** If appropriate, let your customers know you are working remotely when interacting with them. When schools and daycares close, it is difficult to keep noise from pets and children from occasionally being heard. Customers will be very understanding during these times as long as they are informed.
- Video** Use video whenever possible. Seeing a friendly face is good for morale in long-term remote situations.
- Video team meetings** To build a strong sense of team, it can be good to have a daily check-in video meeting where the team can “gather around” and see each other and share any news or new directives and success stories.
- Create expert teams** Within the RingCentral application, you can set up teams on different areas of expertise and allow agents to reach out to these teams with help on hard questions. This solves customer problems faster, and the mentoring that goes on helps build a sense of team within your group.
- Extend the expert teams** If possible, extend the expert teams beyond the contact center to include knowledgeable people across your company to provide assistance with hard or specific questions—this is a good and efficient way to increase first-contact resolution.
- Communicate often** Take advantage of the collaborative capabilities of RingCentral to communicate with your team both in groups or individually. Don't let work from home isolate you.

GENERAL PRODUCTIVITY BEST PRACTICES

- Routine** Follow your routine (set your alarm, get up on time, take a shower, grab coffee and breakfast, and prepare your lunch, just like you have before working from home).
- Physical activity** Exercise if possible, and at minimum get up at least once an hour to stretch and move.
- Set boundaries** Set boundaries with housemates, kids, your significant other, etc. Let them know your working hours and ask them to be mindful.

BACK OFFICE

Your non-agent workforce will also be impacted and forced to work remotely. RingCentral can help support those needs.

Back-office call routing

RingCentral enables work at home across the entire company, not just for the contact center. While the general connectivity with various employees across the company does not need to change over a work-from-home situation, there may still be communications changes that your contact center team will need to be aware of.

SCRIPTING CONSIDERATIONS

In times of emergency, your contact center can take advantage of additional RingCentral Contact Center capabilities to help handle changes in operations and a potential increase in contact volume.

Disaster recovery scripts and hours of operation

Consider making changes to your IVR scripts to reflect your contact center's current situation, including changing your IVR message, providing estimated wait time information, and giving your hours of operation.

Hours of operation with override branches empowers you to invoke emergency IVR procedures quickly and easily.

Queued callbacks

If you anticipate a spike in call volume and don't currently use queued callback, consider implementing it. This will give your customers the option to hang up and receive a callback when you have an agent available.

Voicemails

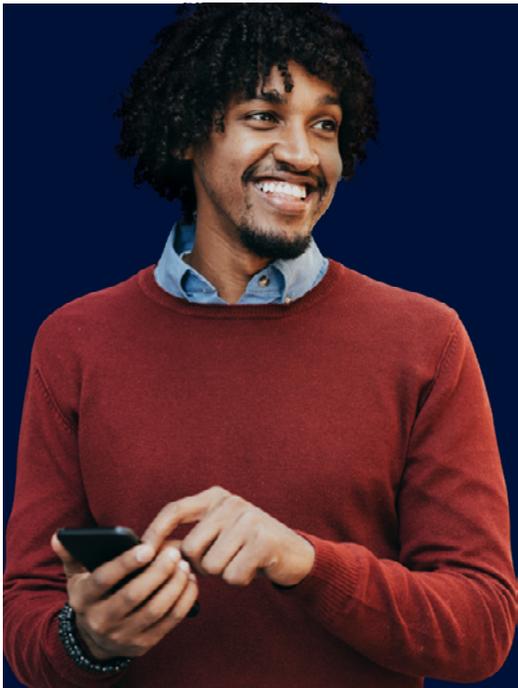
If you anticipate an increase in call volume after your working hours and don't currently route voicemail through your ACD, it may be an additional option to ensure all customer contacts are handled efficiently upon opening the subsequent day.

Digital options

Consider activating alternative channels of communication—like digital and social—to provide your customers more ways to reach you

Call prioritization

Review your current priority management in queue parameters to ensure inbound contacts are routed based on immediate customer need and potential emergency level.



ABOUT RINGCENTRAL

RingCentral, Inc. (NYSE: RNG) is a leading provider of global enterprise cloud communications, collaboration, and contact center solutions. More flexible and cost-effective than legacy on-premises systems, the RingCentral platform empowers employees to work better together from any location, on any device, and via any mode to serve customers, improving business efficiency and customer satisfaction. The company provides unified voice, video meetings, team messaging, digital customer engagement, and integrated contact center solutions for enterprises globally. RingCentral's open platform integrates with leading business apps and enables customers to easily customize business workflows. RingCentral is headquartered in Belmont, California, and has offices around the world.

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RingCentral

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