

Security, Connectivity, & Performance in Distributed Settings

A National BPO Collaborates with LiveVox to Help Manage an Intricate Environment



Strengthened Data Security

90%
Productive Agent Base

Streamlined remote access for 600 agents

A major national BPO's decision to invest in LiveVox was a choice that future-proofed their entire operation, and when COVID-19 arrived the BPO was able to leverage the partnership and adapt to changes quickly and nimbly with virtually no interruption.

Having teamed up with an industry-leading technology partner, they were able to pay big dividends forward to their clients and end-customers during a challenging time. In addition to the flexibility they needed during the pandemic, using LiveVox's versatile platform helped them accomplish a key productivity goal: to make sure that agents could maintain at-or-near-normal operational contact rates.



Use Case

Accounts Recovery Management



Industry

Financial Services / Business Process Outsourcing



Solution

Tailored Agent Desktops with Modified Customer Data Views



Impact

Increased Flexibility & Agent Efficiency

Benefits at a glance:

- ✓ Unified, streamlined access for agents across clients.
- ✓ Flexibility to accommodate diverse environments.
- ✓ Increased consent management.
- ✓ Standardized customer data protection.
- ✓ Improved payment process as a result of modified data views on agent screens.
- ✓ More employee accessibility.

The Challenge

Amidst a global pandemic, they knew it was imperative to maintain business continuity with remote agents. To do this they collaborated with LiveVox to tackle three main challenges:

1. Establishing a secure & reliable internet connection for all agents.
2. Protecting customer data.
3. Identifying the tools needed to carry out productive customer conversations securely & reliably.

The Solution

The BPO took a measured approach to moving to at-home setups by sending out surveys to assess internet bandwidth for agents at home. They provided virtual desktops and devices to their broad and complex network of employees. They established a dynamic access model for secure collaboration & connection via AWS and LiveVox. The LiveVox platform provided end-to-end data protection options including modified agent desktops that let managers configure agent views, thereby enabling privacy and control over customer information.

The goals were ambitious:

- Maintain customer experience.
- Protect consumer data.
- Provide agents with the right tools.

The Results

Agents shifted to a remote setting using an iterative approach that began with bandwidth surveys. The group sent agents home in batches to test internet reliability. Within a week, agents moved to at-home work utilizing LiveVox's cloud-based, low-bandwidth platform.

The results were real:

- Strengthened data security.
- Streamlined remote access.
- Achieved 90% productive agent base.

The BPO built out processes for increased training and IT needs. They programmatically released updates to policies & procedures and maintained open lines of communication via internal channels, regular meetings, and an increased reliance on digital channels and IVR capabilities.



Phase 1: Testing & Validation

The need to quickly shift from in-person office work to operating in a distributed environment had the potential to be a daunting challenge. But, the group's collaboration with LiveVox worked when it really needed to.

The operations executive leading the project knew it had to be done systematically, with measured tests and validations proving the transition was viable. In shepherding the BPO through that transformation, one of the first priorities was standardization. They wanted to give agents across the company one set of tools so they could provide service in a consistent and secure way. *"That's how you build consistent experiences, from client to agent to customer."*

There were the added intricacies of internet reliability and securing customer data, too. They knew they could rely on LiveVox, a cloud-based solution with naturally low bandwidth requirements to ensure the best connectivity rates. They also knew that LiveVox was flexible enough to handle the modifications needed to continue collecting payments securely with limited exposure for sensitive customer data.

To meet this challenge, their team worked with LiveVox to help secure a remote ecosystem using limited internet bandwidth for calls that also provided the security measures and risk mitigation capabilities required when dealing with payments over the phone.

"We knew from working with LiveVox for a number of years now what our bandwidth requirements were," an executive told us. "Fundamentally, the voice path for the LiveVox solution goes out over a normal internet path. It does not come back into us in any way, shape, or form, thus it doesn't compromise or make agent access difficult in any way."

Phase 2: Applying Robust Security

The next step was deployment. *“We knew we needed to do three things: make it simple for agents to connect and establish an audio path, ensure that the right data was available to the agent, and ensure that the agents have the right tools for the job.”*

LiveVox’s platform made it easy for their agents to connect anywhere using a modern web browser. The LiveVox desktop application can be downloaded onto an agent’s PC or accessed via a mobile web browser. Because agent views can be tailored and controlled at the management level, the solution allows for added control mechanisms.

Another advantage was how efficiently LiveVox’s agent configuration and IVR can take payments. Agents can be more productive because they can still get customers to the payment process quickly without introducing any vulnerabilities to payment processing. LiveVox’s versatile platform met a security requirement for the group: ensuring that sensitive customer information was protected.

As a leading BPO in a highly-regulated industry, they had shrewdly invested in a modern contact center solution that could meet stringent regulatory requirements. Since LiveVox centralizes control over consumer information and consent policies, the BPO knew they had a solid risk-mitigation partner. *“Having a foundation like this helps us proceed more confidently when challenges arise,”* the executive noted.

Phase 3: Optimizing Performance

Throughout the transition, the team kept these top three initiatives in mind: business continuity, data protection, and providing agents with the tools they need. They credit LiveVox for contributing in all of these areas: *“The platform plays an important role in security not just in terms of its IVR component,”* said the executive. *“It’s very important in our agent productivity initiative as well, because it gives managers oversight of agent activity even in remote settings through robust reporting, training, and monitoring capability. And of course, as a best-of-breed cloud solution, LiveVox excels at tying all of this disparate information into a single pane of glass that’s actionable.”*

The group used LiveVox Speech Analytics to scale compliance monitoring and quality control. They built team bonds while remote through coaching and training programs, often using the playbacks from call recordings and leveraging speech analytics insights for script refinement. With agent scripting, quality management across distributed teams became a powerful enhancement to their existing training protocols by providing deeper performance insights to agents and managers.

In this new setting, positive gains are being made that will have lasting impacts on the way the BPO serves clients in the long term. For now, they have succeeded in providing secure access to agents and protecting sensitive information all while streamlining processes.

In closing, they noted *“We are seeing significant payments arising from tax season. As we look at the combination of speech analytics, agent scripting, and the monitoring that we’ve put in place using LiveVox, fortunately, our production has increased since moving to this virtual environment.”*

