11 Ways A CRM Benefits
the Remote Contact Center

As a contact center leader, your top priority when transitioning onsite agents to work from home is to keep them productive & connected.

But that isn't the only challenge. You'll also need to keep security & compliance practices intact, maintain agent oversight for quality management, & foster an environment of clear, transparent communication.

Here are the benefits that a well-configured CRM can provide at-home agents:

KEEP SECURITY & COMPLIANCE TOP OF MIND

Ensuring that remote agents have controlled access to relevant customer data & proper controls for sensitive information & data is hurdle number one.

- **Enable controls to ensure sensitive information is hidden, masked & only utilized if & when it's needed.**
  With field-level encryption, you & your customers can rest assured that sensitive information is masked at the most granular levels. You need permission management in place so you can decide which levers to pull & for who.

- **Utilize Secure Payment Capture to take payments without your agents handling credit card information.**
  Secure Payment Capture lets agents securely capture PCI compliant credit card & eCheck payment information. These payment methods should be stored in your CRM system in order to process payments from your Agent's dashboard at any time, without the need to display or request sensitive customer data.

- **Give your management team the tools to monitor & measure hand-offs & resolutions.**
  Field-level encryption, secure payment capture, & permission management are just a few of the mechanisms you should have in place to set your team up for success. Pre-configured agent experiences & an agent desktop editor would let you craft the view you want to give your staff. Task management & personal queue access help you effectively allocate resources. Integration to ticketing & WFO tools would let you maximize agent potential & adherence to established messaging.

ENSURE THE HIGHEST LEVELS OF PRODUCTIVITY

- **Provide channel-specific information & legal documents via email.**
  Utilize digital channels for upselling opportunities and increase productivity with other asynchronous, high-visibility channels like two-way messaging.Your CRM should come with access to digital channels, so you can configure automatic email, chat, and SMS campaigns that fire without an agent's intervention.

- **Send alerts & notifications with high delivery rates & low-cost.**
  Digital channels take your agents from one to many interactions at a time. Depending on agent capability and training you could ramp up to as much as 5:1 on SMS or 3:1 on chat channels alone. To put that in perspective, the average cost of a phone call is around $6. The average cost of a text message is about $.0.11.

- **Increase agent efficiency by increasing the number of conversations per agent.**
  Because all conversations are unified in your ideal CRM your agents would benefit from a rich collection of contextual information that helps them get to a first-time resolution faster. No need for repetitive questions or redundant verifications — everything would be visible on the desktop because it's linked at the customer account level, not the agent or the department level.

- **Provide SMS, Email & Chat Channels to reduce hold times within your contact center.**
  The more you can do to slim your call queues the more proactive you'll be able to be with your customers. Digital channels can help deflect calls and alleviate an uptick in volume through proactive communication. You can even encourage customers to be more self-reliant with the use of chatbots and links.

👍 DON'T SACRIFICE IN-PERSON CONNECTIONS & COMMUNITY

Many organizations rely on physical locations to manage their internal communication, the delivery of information, & the tracking of customer issues. In a distributed environment communication can breakdown, but with a single source of truth, you can failproof cross-departmental interactions with robust ticketing & reporting capabilities.

- **Deliver relevant information during every conversation.**
  The agent dashboard is the North Star for stellar customer experience because it aggregates all of the most pertinent data in one easily accessed screen. There's no waiting for systems to load, no switching screens, no new tabs. Just quick answers and speedy service.

- **Use chat to keep internal lines of communication open.**
  Agent-to-agent chat helps your team stay connected & reduces miscommunication as the consumer speaks to multiple employees. Because your ideal CRM is built from a unified data model, conversations won't get lost & follow customers across interactions.

- **Streamline cross-functional communication with ticketing.**
  Enable ticketing to function as a workflow between your teams & increase the first-time capture of key information. Easily transmit tickets cross-departmentally & ensure agents are entering the required information & asking the proper questions by embedding the ticket form in any Agent's Desktop.

- **Encourage self-service with ticketing.**
  Minimize agent/customer interactions by embedding ticket forms on your website. In addition to facilitating good tracking & cross-functional communication, ticketing should be designed to encourage customers who are visiting your site to submit support tickets & send vital feedback. When you embed the ticket widget on your site it can automatically create a ticket that your Agents can work from & respond to without ever having picked up the phone.

When you're first transitioning to an at-home model, remember that you don't have to try & boil the ocean. Less is more; begin by analyzing a sample of your agent conversations to determine what is mission-critical & provide only the necessary data. Keeping it simple & focusing on solving immediate problems will help to make the transition more manageable.

The net benefit of a CRM is the ability to act as a single source of truth for your team by surfacing all relevant information in one location. Moreover, when digital channels are tied into your CRM you allow agents to expand their communication — as well as your ability for oversight since all conversations are tracked & recorded at the account level. This would let you quickly integrate your existing system of record & allow your agents to access vital customer data remotely & securely so that they can deliver a great customer experience wherever they are.