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Gartner for Customer Service and Support

Make Work From Home Work Long-Term

Customer Service and Support Research Team

The COVID-19 pandemic prompted many service organizations to rapidly transition their operations to work from home. Customer service and support leaders should use this resource to understand the key elements of a successful WFH program and build a durable WFH strategy moving forward.

Overview

Customer service and support leaders have rapidly adapted their primarily office-based operations to work from home (WFH). In doing so, many had to scale up a WFH operation that was intended to be the exception or a performance-based reward — or that didn't exist at all. While a WFH program can benefit business continuity planning, cost management, employee engagement and support availability, that only happens when a WFH strategy is executed correctly. Without a well-executed WFH strategy, organizations face potential technological and infrastructure risks, talent management challenges and staffing headaches, and both customer experience and employee experience can suffer.

This resource will outline key differences between a WFH service organization and an office-based one as well as provide guidance on how to account for those differences in operational strategy, infrastructure and talent management practices.

Key Findings

- Due to the COVID-19 pandemic, customer service and support leaders have had to transition their operations to WFH, and the consensus is that the transition will, to some extent, be permanent.

- Simply shifting office-based strategy to the WFH context will not allow organizations to fully realize the benefits of a WFH approach. Instead, customer service and support leaders must take steps to adapt operations strategy, talent management practices and technology infrastructure to WFH.

- There are some elements of service and support strategy, namely measurement and VoC, that should remain consistent to ensure the customer experience doesn't suffer as a result of the transition.

Recommendations

To successfully adapt in-office strategy and operations to WFH long-term, customer service and support leaders should:
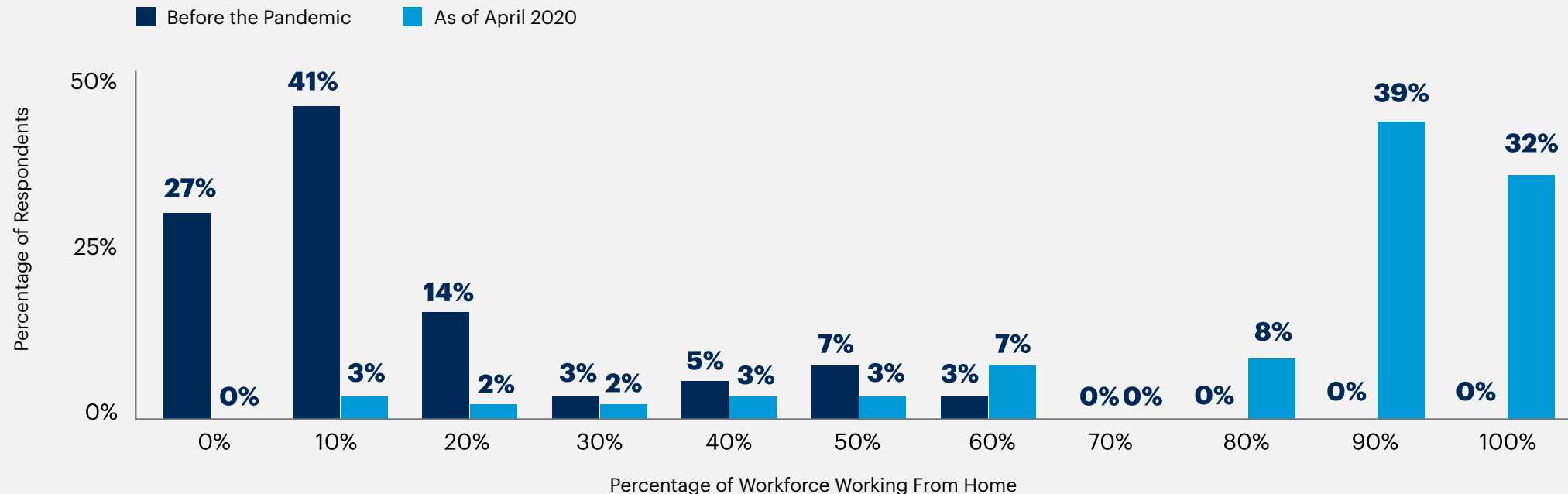
- Review the key ways in which WFH service operations fundamentally differ from office-based operations in order to build a sound long-term WFH strategy.

- Evaluate key service and support leader actions in implementing a long-term WFH strategy to identify overlooked actions and prioritize next steps for your organization.

- Monitor service organization performance to ensure changes to your WFH strategy result in desired business and customer experience outcomes.

A Massive Shift in Operations

In the wake of the COVID-19 pandemic, service operations had to pivot quickly from primarily office-based to almost fully remote (see Figure 1).

- Sixty-eight percent of service leaders report that 10% or less of their staff were working from home before the pandemic.

- After the pandemic began, 71% of service leaders report that 90% or more of their staff are working from home.

Figure 1. Percentage of Workforce Working From Home Before and During the Pandemic

■ Before the Pandemic   ■ As of April 2020

(Bar chart — Percentage of Respondents (y-axis) vs. Percentage of Workforce Working From Home (x-axis))

Workforce %	Before the Pandemic	As of April 2020
0%	27%	0%
10%	41%	3%
20%	14%	2%
30%	3%	2%
40%	5%	3%
50%	7%	3%
60%	3%	7%
70%	0%	0%
80%	0%	8%
90%	0%	39%
100%	0%	32%

n = 59 customer service and support leaders

Source: 2020 Gartner Customer Service and Support Pandemic Impact Survey
Q: "Prior to the emergence of the pandemic, roughly what percentage of your workforce worked from home?" "As of [April 2020], roughly what percentage of your workforce is working from home as a result of the pandemic?"

This shift to WFH was necessitated by the pandemic, the impacts and disruption of which service leaders believe will continue at least through the end of 2020. And it seems that, to some extent, the shift will remain permanent, even after the pandemic is over.

80% of service and support leaders say they expect an increase in WFH programs after the pandemic.

82% of company leaders intend to permit remote working at least some of the time.

**47%** of company leaders intend to permit remote working all of the time.

But in conversations with heads of service and support, we learned the organizations that made the initial transition to WFH most easily either already had robust WFH programs or had ready-built WFH contingency and preparedness plans. For most others, the initial transition to WFH operations was an unplanned, untested and imperfect shift of office-based people, schedules, processes and technology into the home environment. This unprecedented shift to WFH has left many service leaders with lingering concerns about the employee work environment, new hire onboarding and employee well-being, among other things.

In order for organizations transitioning from office-based to expanded WFH operations to reap and maintain the full potential WFH benefits of increased productivity, engagement and employee retention, service and support leaders must understand the key differences between the models. Specifically, service leaders must understand where office-based operations strategy, infrastructure and talent management can't simply be ported over to WFH — and the key considerations for building a successful WFH strategy.

Three Key Differences of WFH

Gartner has identified three major categories service and support leaders must consider when crafting a long-term WFH strategy: operations strategy, infrastructure and talent management (see Figure 2). (To learn more, see "Tool: Checklist for Building a Long-Term WFH Strategy.") That's not to say that these categories are not important in office-based service. In fact, they are crucially important in both environments. But they also differ fundamentally by environment in some meaningful ways. The sections below examine each category in more detail and provide the key actions service and support leaders should take.

Figure 2. Three Key Categories for Managing the WFH Transition
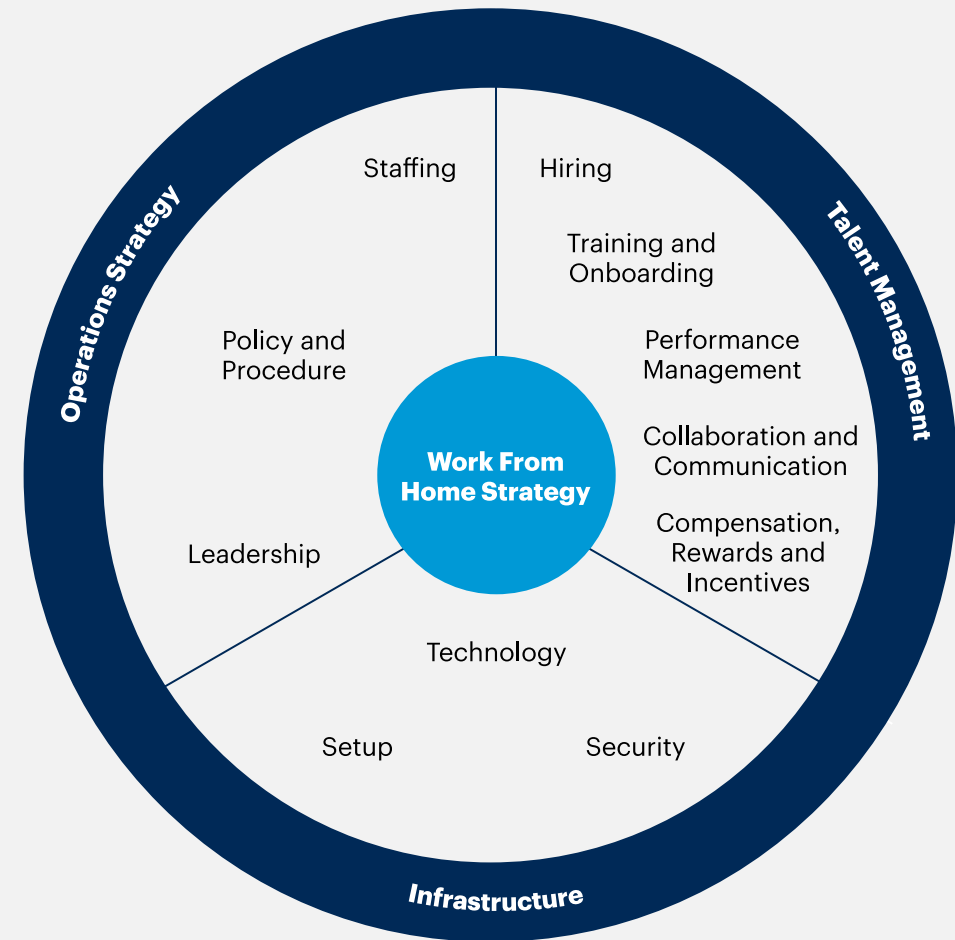
Source: Gartner

Operations Strategy

At the heart of a successful transition to WFH is the operations strategy transition. Customer service and support leaders must adjust the fundamentals of their staffing, policies and procedures, and leadership to meet the WFH challenge.

Key Service and Support Leader Actions

Staffing — Evaluate work models to determine which staffing strategy best serves your organization's needs and will allow you to take the best advantage of WFH benefits.

- Select the work model (e.g., hybrid, fully remote) that is right for your organization in the long term based on your primary WFH program objectives and industry regulations.

- Decide whether remote employees will rotate into and out of an office or be 100% remote.

- Determine whether remote reps can be geographically remote (not tied to any office location).

- Consider incorporating alternative scheduling arrangements (e.g., split shifts, microshifts, a compressed work week) in your staffing strategy.

- Expand or contract operating hours, and reevaluate shifts as necessary.

Policy and Procedures — Adjust the organization's policies and procedures to reflect the reality of a WFH environment.

- Adjust roles and responsibilities (e.g., scope of work or performance expectations) to reflect WFH as needed.

- Collaborate with HR, legal and finance partners to create WFH requirements for the employee handbook, WFH employee agreements and a WFH expense policy.

Leadership — Ensure employees still feel a connection to the leadership, and provide leaders with resources to adapt to the WFH environment.

- Provide specialized training to managers on how to lead and manage WFH employees.

- Have managers with remote managerial experience partner with newly remote managers to provide mentorship.

- Provide guidance and frameworks to ensure managers are still accessible in a remote setting (e.g., a virtual open-door policy, office hours).

- Use collaboration technology and virtual meetings to connect managers with one another and provide ongoing support and development.

Infrastructure

In-office operations allow for full oversight and control of the work environment employees operate within. With the transition to WFH, each employee's home office setup needs to be, in essence, a self-contained service organization. The following actions will enable service and support leaders to ensure that customer data is secure and that neither the employee experience nor the customer experience suffers due to the WFH transition.

Key Service and Support Leader Actions

Technology — Equip employees with the necessary software and hardware to perform their jobs remotely.

- Assess and provide the necessary equipment to remote employees to ensure productivity and quality continuity (e.g., softphones, dual monitors, laptops).

- Create a technology asset management strategy to manage the equipment return and replacement processes.

- Adjust your IT support strategy to support remote employees (e.g.,remote access, expanded hours, remote delivery of equipment orsoftware requests).

Setup — Ensure employees create a distraction-free at-home work environment.

- Establish minimum home setup requirements, such as having a dedicated space to work, a minimum internet speed and a clean desk policy, to minimize distractions and interruptions.

Security — Protect your organization and your customers from risk by taking steps to safeguard data.

- Evaluate whether remote employees are allowed to process sensitive data, such as financial transactions (i.e., are there legal or regulatory restrictions?).

- Equip remote employees with the necessary security measures (e.g., secure data transmission, encrypted PCs, privacy screens).

- Set up a remote security monitoring plan (e.g., recording and screen capture, keystroke monitoring).

- Create a response plan for remote security breaches in collaboration with your peers in IT.

Talent Management

Expanding WFH operations could totally transform the talent pool that underpins service by potentially eliminating geographical considerations from the talent conversation. This would create a much larger geographical profile to pull talent from and keep talented employees from leaving the company just because they leave the immediate area.

However, with the transition to WFH, many organizations lose the face-to-face interactions that serve as the bedrock of their talent management strategies. To build a successful long-term WFH strategy, service and support leaders must figure out how to keep employees productive, engaged and connected to the organization and one another while working remotely.

Key Service and Support Leader Actions

Hiring — Identify the current agents best-suited for remote work, and adjust the hiring profile so new hires emulate those agents.

- Determine WFH criteria for current employees (e.g., performance-based, tenure-based, unrestricted).

- Revise job postings and criteria for hiring directly into remote positions to emphasize the need for self-starters, troubleshooters, strong communicators and natural collaborators.

- Reevaluate the recruitment process and the audience for remote positions (e.g., expanding into new geographies, linking to diversity and inclusion initiatives).

Training and Onboarding — Transition training and onboarding to a virtual setting, if necessary, and evaluate the need for new-in-kind training for remote employees.

- Determine whether training and onboarding will take place on-site or virtually.

- Create virtual onboarding and training options to replace on-site training, if applicable, and adjust the curriculum to the remote setting (e.g., microtraining sessions, enhanced engagement and assessment opportunities).

- Establish a training collaboration channel to share updates and collect agent tips and tricks.

- Facilitate collaboration between the training teams and managers and the quality team to monitor and evaluate the need for new-in-kind skills training for remote employees.

Performance Management — Maintain productivity and quality by continuing to monitor remote employees and creating a structure to facilitate virtual coaching.

- Monitor for productivity and quality performance gaps between home and office (both overall and for individual employees).

- Set up channels, processes and cadences for both scheduled and integrated coaching sessions.

- Establish communication channels for coaches and the quality assurance team to ensure collaboration.

Collaboration and Communication — Facilitate connections and communication among remote employees to foster a sense of community and company culture, even without face-to-face interactions.

- Inform remote employees of new information and updates through pushes and alerts, and monitor information uptake.

- Evaluate whether current collaboration and communication technologies can facilitate virtual collaboration.

- Establish a regular schedule of team check-ins and huddles.

- Develop a regular cadence for gathering voice of the employee data as well as a WFH continuous improvement process.

- Consider increasing the frequency of employee engagement surveys to monitor employee morale and engagement in the remote setting.

- Foster collaboration through team-based performance and networking incentives.

Compensation, Rewards and Incentives — Reexamine your compensation and rewards strategies to ensure remote employees receive recognition in meaningful ways.

- Determine whether remote salaries and benefits should differ from or align with in-office salaries and benefits.

- Create real-time recognition channels for remote employees.

- Highlight both remote employees and in-office employees in companywide recognition.

- Reevaluate the rewards and incentives strategies for remote employees (e.g., award points for achieving performance goals that employees can cash in for home tech or workspace improvements).

Continue Monitoring Performance

The sign of a successful transition to WFH-based service operations is that productivity, quality and the employee experience do not suffer as a result of the transition.

It is crucial for service and support leaders to monitor and track the impact of the decisions and changes they've made during the transition in order to see what works and what does not.

While service leaders might expect to see a slight dip in productivity or customer experience quality in the initial phases of the transition to WFH, the key performance indicators they use should, by and large, remain the same. Key performance indicators should, however, be closely monitored to allow for comparison between WFH and office performance and operating expenses. Service leaders may discover that certain metrics become more or less important in the remote setting (e.g., schedule adherence may become more important) and adjust the weighting accordingly. But when WFH transitions are successful, many key performance measures should improve or, at the very least, remain consistent.

In addition to monitoring the service organization's performance against organizational goals, service and support leaders should also focus on gathering and analyzing voice of the customer data and voice of the employee data. Gathering and analyzing this data will allow organizations to monitor if and when the WFH transition is negatively or positively affecting the customer or employee experience and identify the factors that might be driving that impact.

Conclusion

The rapid transition to primarily WFH-based operations was a massive undertaking for many organizations that made the transition without a preestablished program or plan to expand upon. And while the initial transition was challenging, it also proved beneficial for many companies — improving the employee experience without harming the customer experience. As a result, many leaders are now looking to make the transition permanent.

To reap the full rewards of a WFH service strategy in the long term, customer service and support leaders must understand the key ways operations strategy, infrastructure and talent management differ in the WFH context. Then, they must adapt their plans in those categories accordingly.

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Tool: Checklist for Building a Long-Term WFH Strategy

How to Successfully Transition to Virtual Onboarding

Adopt an Effective Virtual Training Program

Get Going on Your Work From Home Program

Podcast: The Future of Work From Home Strategy With Pete Slease and Sarah Dibble

Key Considerations for Implementing a Work From Home Program and Reducing Risk

Tool: Remote Work Policies Template for Service and Support Leaders

Ignition Guide to Implementing a Successful Work-From-Home Program

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