



Gartner for Customer Service and Support

# Metrics to Monitor for Lasting WFH Success

Customer Service and Support Research Team

Existing performance measurement strategies must adapt to the new WFH operating environment. Customer service and support leaders can use this resource to understand key metrics to monitor to gauge the impact of WFH on business objectives like cost, productivity and the customer experience.



## Overview

With the short-term success of the COVID-19-induced transition to work from home (WFH), many customer service and support (CSS) leaders are looking to adopt a permanent WFH program. However, WFH introduces work-related variables that are outside of the CSS function's control. It is more difficult to monitor quality, control service reliability and sustain performance management in the WFH environment because employees are working in their own homes, relying on their own networks and communicating through virtual collaboration tools. CSS leaders must adapt the metrics used to measure the function's performance against business goals (e.g., cost optimization, productivity, high-quality customer experiences, employee well-being) to the realities of WFH. Adjusting the function's existing measurement strategy with the appropriate indicators for infrastructure, operations strategy and talent management will allow CSS leaders to accurately monitor long-term WFH viability.

## Key Findings

- WFH service operations and on-site operations are fundamentally different because CSS functions must rely on their employees' home environment and networks to operate successfully, without in-person support.
- CSS leaders must continuously monitor key infrastructure, operations strategy and talent management metrics to ensure the function continues to operate successfully in a WFH environment.
- While the transition to WFH has so far not harmed employee performance, CSS leaders should continue to compare WFH and in-office performance as they establish more permanent WFH operations.

## Recommendations



To successfully monitor WFH operations as part of service and support strategy, customer service and support leaders should:

- Adjust the measurement strategy to include metrics that could indicate negative downstream impacts on organizational goals (e.g., CX, productivity, service quality).
- Compare WFH employees to on-site employees to identify where WFH may help or hinder efforts to meet business objectives.

## Track Leading Indicators of Lasting WFH Success

WFH operations are different from on-site operations. Employees who WFH can no longer rely on a centralized office, IT support, their coaches or peers to provide in-person assistance (see Figure 1). CSS leaders should adjust their measurement strategy to include metrics that could be indicative of negative downstream impacts on organizational goals (customer experience [CX], productivity, etc.). In this section, we will lay out the key differences that CSS leaders will want to account for in their measurement strategy along with our recommendations of what to measure.

Figure 1. Differences Between On-Site and WFH Employees



	On-Site Employee	WFH Employee
<b>Infrastructure</b>	Obtains technology troubleshooting assistance from the IT support center in-office	Obtains technology troubleshooting assistance from the IT support center
<b>Operations Strategy</b>	Works in centralized office alongside multiple employees and functions	Works in a home environment and via a personal network
<b>Talent Management</b>	Receives coaching support from supervisors on the floor or peers in close proximity	Receives coaching support from supervisors or peer using online collaboration tools

Source: Gartner

## Infrastructure

In WFH operations, the CSS function's IT support must attempt to monitor and service dozens or hundreds of “mini contact centers” to the same caliber as on-site employees. Should network outages, technical glitches or equipment malfunctions occur, such changes make it more difficult for IT partners to quickly respond, which can create poor customer experiences or declining service levels. We recommend CSS leaders include metrics such as network disconnects and Wi-Fi signal strength in their performance measurement strategy to monitor whether WFH employees have a reliable internet connection and confirm their systems are running efficiently. CSS leaders should also pay greater attention to internal IT ticket backlogs and begin tracking the network interface card (NIC) connection history of company-sponsored laptops.

## Metrics to Monitor

- **Abnormal network disconnect rate (customer service representative [CSR] uptime)** — This metric measures the number of transactions initiated and completed without service interruption over the total number of transactions in a set period of time (i.e., day, week, month). Tracking the number of network disconnects allows CSS leaders to determine whether the overall health of their employees' wireless networks can sustain desired productivity levels.
- **Wi-Fi signal strength** — This metric measures the number of transactions initiated and completed without service interruption over the total number of transactions in a set period of time (i.e., day, week, month). Tracking the number of network disconnects allows CSS leaders to determine whether the overall health of their employees' wireless networks can sustain desired productivity levels.
- **Internal ticket backlog rate** — This metric evaluates the sum of unresolved tickets WFH employees submit to IT support over a duration of time. Tracking this metric can help CSS leaders gauge whether current IT support can assist and resolve issues that employees are experiencing while working from home, and whether their technology is vulnerable to issues like malware and cyberattacks.

## Operations Strategy

Before WFH, the centralized nature of on-site service meant the CSS function had enough employees on hand (and business continuity plans in place) to handle customer inquiries irrespective of major weather events, traffic delays, etc. But with the permanent adoption of WFH, CSS leaders have less control over their employees' operating environments. And although employees are now working from home, they are generally still concentrated in a single geographic area. WFH agents and the CSS organization are therefore vulnerable to power or internet outages as well as inclement weather events that could theoretically take the entire CSS function out of commission — without the business continuity planning they would have relied on in the past. Thus, WFH can make it more difficult to manage service reliability and maintain desired — and consistent — service levels. Ultimately, the customer experience can suffer. CSS leaders should therefore closely monitor recovery time objectives (RTOs) and recovery point objectives (RPOs) to maintain operations in the WFH environment.

## Metrics to Monitor

- **Recovery time objectives (RTOs)** — This metric measures how long an organization can tolerate a customer service function outage and how quickly it must be restored, including data recovery. Adapting RTOs to the WFH environment will help CSS leaders ensure the function has ample coverage to retain desired service levels despite potential service downtime.
- **Recovery point objectives (RPOs)** — This metric measures the amount of time between the loss of data and the preceding backup. By reconfiguring RPOs for WFH, the CSS function can mitigate negative impacts on CX because it will have made the necessary preparations in the event of service disruption.

## Talent Management

In pre-COVID-19 on-site operations, all employees worked together on the service floor and were able to turn directly to their peers or supervisors for coaching and support. If employees had an issue, they could easily signal for assistance and receive real-time support and coaching. Conversely, managers could watch for body language (or other visual cues) that might signal an issue with an employee. But with the adoption of WFH, supervisors and CSRs can no longer rely on visual cues and must adapt coaching and support to the virtual environment.

As such, CSS leaders must now monitor coaching metrics more closely to ensure employees are still obtaining the necessary support while working from home. They should also pay greater attention to employee well-being to ensure the WFH environment does not negatively impact the employee experience (EX) — leading to attrition and potentially harming the customer experience.

## Metrics to Monitor

- **Ongoing coaching support** — This metric evaluates the frequency of ongoing coaching interactions CSRs have with their supervisor (or designated coach) as well as ongoing hours reserved for basic and advanced training. CSS leaders should track the frequency of coaching and support that CSRs receive in the WFH environment to improve their ability to deliver quality service interactions for customers in the WFH environment. Additionally, CSS leaders should pay greater attention to manager-employee interactions to ensure that employees do not lose coaching and development opportunities, which could negatively impact productivity and, consequently, CX.
- **Overtime rate** — This metric calculates the hours worked by an employee that exceed the hours allotted for the standard workweek. Tracking this metric allows CSS leaders to spot signs of employee burnout that can negatively impact productivity rates as well as EX; the overtime data can show when — and for how long — an employee is working outside of approved working hours.
- **Employee sentiment** — While this is not necessarily a metric, CSS leaders need to develop a mechanism (e.g., pulse surveys, manager check-ins, etc.) to closely monitor how employees are feeling. CSS functions should adopt frequent methods to monitor employee sentiment and engagement to forecast if WFH employees are nearing burnout, becoming disengaged or considering leaving the organization.



## Monitor Key Metrics to Ensure You Meet Long-Term Business Objectives

Immediately following the transition to WFH due to the COVID-19 pandemic, CSS leaders compared their WFH workforce's productivity and performance to that of on-site historical data. In interviews we conducted with CSS leaders from member organizations, many have said that, after an initial transition period, WFH has not harmed performance in their key goals (i.e., high-quality service, first-contact resolution, customer satisfaction, etc.). Some CSS leaders have even reported that employee productivity has steadily climbed throughout the year.

Yet many CSS functions are still in the early stages of WFH, and sustained performance and productivity are not guaranteed. CSS leaders must continue to monitor key performance measures and compare the WFH workforce to the on-site workforce (either current employees or historical data) to understand gaps between WFH and on-site performance.

The following selection of metrics will help CSS leaders determine where any gaps in performance and productivity exist between the WFH workforce and employees who work (or had worked) in the office:

### Employee Productivity

- **Adherence rate** — Measures the amount of time a CSR is logged in and actively handling service inquiries compared to the difference of their shift time and break time. This metric can assess whether WFH CSRs are voluntarily complying with their schedules and addressing customer contact volume at desired rates.

- **Turnaround time** — Tracks how long it takes for a CSR to resolve a customer inquiry. Assessing this metric will allow CSS leaders to compare the productivity of WFH employees to ensure CX is not negatively affected.
- **Utilization rate** — Evaluates how much CSR time is spent on customer work, including wrap time. This metric will indicate whether WFH employees are efficiently handling contact volume and maintaining desired service levels.
- **Occupancy rate** — Calculates the percentage of total available time a CSR spends handling customers' issues, not including breaks, training, coaching and meetings. Using this metric will help CSS leaders understand how often a CSR is spending time on client work when working from home.

### Quality

- **Quality assurance (QA) scorecard evaluation** — Determines the performance rating of a CSR after handling a service interaction. For WFH employees, CSS leaders can use QA evaluations to understand whether the WFH environment is negatively impacting CX due to environmental disruptions such as crying children, construction noises or barking dogs.

### Cost

- **Shrinkage factor** — Evaluates the minimum staff needed to be scheduled to achieve service-level and response-time objectives. A high shrinkage factor indicates inefficient scheduling, leading to increased labor costs.

By comparing the WFH workforce to the on-site workforce, CSS leaders will see how WFH helps or hinders employee performance, productivity and, consequently, CX.



## Conclusion

Although many CSS leaders are looking to make WFH more permanent after the COVID-19 pandemic, the sustained performance they have seen so far is by no means guaranteed. CSS leaders must carefully monitor WFH operations and adapt the existing measurement strategy to adjust to the differences in infrastructure, operations strategy and talent management. CSS leaders must consider and adapt to the new variables that are outside the function's control and directly impact whether or not business goals are met — including business continuity coverage, network reliability, and accessibility to coaching and support, among other aspects. Additionally, by comparing the WFH workforce to either peers who work on-site or historical rates, CSS leaders can monitor the effectiveness of WFH operations in meeting business goals. In order to set the WFH program up for success, CSS leaders need to change how the function is measured to account for the new realities of WFH operations.



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