



REMOTE AGENTS

Moving from the Quick Fix
to Long Term Solution

WHAT'S INSIDE:

Best practices for training and managing remote agents
Key tools to support long-term strategies
Where + how to get started



THE PANDEMIC SITUATION

The COVID-19 pandemic was an urgent wakeup call for healthcare organizations. As stay at home orders and social distancing measures began to limit hours of operation for clinics across the nation, the promise of virtual care (which was once a far-out item on a wish list) quickly became a critical necessity. After the pandemic began, patients not only preferred the option of digital experiences, but now found themselves more reliant on them than ever before.

The [2020 Change Healthcare](#) – Harris Poll Consumer Experience Index found that across all phases of the healthcare journey, consumers are seeking more modern, digital communication from both providers and payers. The majority of patients said they want their healthcare provider (68%) and health insurance plan (71%) to communicate with them using more contemporary platforms. A growing patient preference for digital communication channels coupled with the larger cultural shift to the prioritization of digital experiences has ignited the shift from brick-and-mortar healthcare to a new era of virtual care.

However, the healthcare industry has struggled to provide the same quality of patient communications with a now completely remote workforce. As healthcare systems adapted to the change, gaps in their communications technology, such as the lack of flexible digital channels for virtual communications and care, became glaring issues.

Many organizations began using traditional web conferencing or social media applications to communicate with their patients. This presented a major security risk – one that exists to this day, as many organizations are still utilizing their quick fix, bandaged approach to the shift in care. Now, a year into the global pandemic, healthcare organizations must reimagine their long-term communications strategies to support their success in this new era of patient communications.



PATIENT EXPERIENCE

EVOLVING PATIENT EXPECTATIONS CALL FOR A NEW APPROACH

Over the last few years technology has accelerated at a rapid pace. The pandemic hastened that acceleration even more. The [2021](#) Gartner Board of Directors Survey reports that 69% of boards of directors accelerated their digital business initiatives as a result of the pandemic.

Advancements in technology have had an especially significant impact on the healthcare industry. Online appointment scheduling, patient portals and video visits are all evidence of the digital transformation that was already occurring prior to the pandemic.

Shifting patient expectations and recent digital transformation trends have called for this evolution in the way that patients can communicate with their healthcare providers. Consumers now use their mobile devices to accomplish an array of daily tasks such as ordering groceries for delivery or depositing a check through a mobile app. As a result, today's patients have come to expect the same easy and convenient digital experience to accomplish their healthcare needs.

The COVID-19 pandemic further solidified the increased expectations for a new digital patient experience. Though the shift to a strong preference for digital care may have its roots as a pre-pandemic trend, it quickly became a necessity once the pandemic began. As more patients begin to seek care through digital channels, healthcare systems need to develop a plan to ensure their patients can seamlessly receive care through any channel, creating a hybrid healthcare approach that blurs the separation between virtual and in-person care.

MAKE IT EASY TO GET CARE

Healthcare organizations layering new technology onto their communications platforms to meet shifting patient communication preferences should consider virtual healthcare best practices. Rather than delineating the distinction between virtual or in-person experiences and drawing a line in the sand between the two, healthcare systems should remain focused on how to best take advantage of the overlap that exists between the two. Today, patient preferences for certain communication modes may vary based on where and when they are attempting to reach out to their healthcare provider. For instance, a patient may prefer to visit the clinic in-person for symptoms they have not been seen for before but prefer to do a virtual visit to manage an existing condition. Different scenarios call for different patient preferences in communication and receiving care.

A BLURRED DISTINCTION BETWEEN IN-PERSON & DIGITAL EXPERIENCES

Today, many patient journeys begin via a digital channel only to ultimately end up being seen physically by a provider in a clinic or hospital. For example, consider a patient who schedules an appointment online for a virtual consultation with a provider for back pain. While meeting over video, the provider determines that the patient must come into the clinic for a physical exam imaging. This common situation is a prime example of the convergence of virtual and in-person care. Technology can help to enrich the patient experience by enabling a hybrid approach to care where there is overlap between digital and physical channels based on the specific need.

To get the most out of a blended approach to care, organizations should consider the scenarios where different modes of communication are preferred and plan their communications strategy accordingly.

AGENT EXPERIENCE

BEST PRACTICES FOR EQUIPPING REMOTE AGENTS

The COVID-19 pandemic has changed many aspects of workplace culture, most notably the massive shift to sending employees to work remotely from home where possible in an effort to help slow the spread of the virus. According to a [Gallup](#) poll performed in September of 2020, 33% of U.S. workers are always working remotely, with about two-thirds of remote workers wishing to continue working remotely – indicative of a strong employee preference for eliminating long commutes and working from the comfort of their own homes.

The healthcare industry faced numerous obstacles in sending their workforce to work remotely due to widespread reliance on outdated legacy technology, such as a strong reliance on on-premise PBX phone systems. In particular, healthcare contact centers were ill-equipped with their communications technology to transfer agents to work remotely – a transition that took weeks, if not months, for many healthcare systems.



UPGRADE COMMUNICATIONS TECHNOLOGY

Healthcare systems have a strong need to adopt a flexible omnichannel unified communications solution to operate their contact centers today as agents continue to work remotely. As all contact center supervisors know, communication is the key to running a successful contact center – even before the added challenge of managing remote contact center agents. Since agents communicate not only with the patients they serve throughout the day, but also with one another, having a solid communication solution is of critical importance to healthcare contact centers, especially as agents continue to work from home.

Cloud-based unified communications solutions enable remote agents to take patient calls from home while also keeping them connected to colleagues. For example, a healthcare contact center that utilizes a cloud-based unified communications solution can enable its remote workers to dynamically chat with other coworkers (who are also working out of their homes), even while on a call with a patient. This flexibility helps remote agents stay connected to their team and helps to facilitate collaboration amongst team members while remaining physically apart.

TRAIN AGENTS FOR SUCCESS IN TODAY'S DIGITAL ENVIRONMENT

As agents continue to work remotely, it is important that contact center management provides training to help them be successful working in this new digital environment. Since the interactions that contact center agents are now having with patients are occurring digitally – whether that be over web chat, SMS or on the phone – the nonverbal components of communication, such as body language, can no longer be used to help convey any information in a conversation. This places a greater emphasis on an agent's active listening skills – making sure that what the patient says is clearly understood and interpreted to best engage back in conversation with them.

Imagine if a doctor visited the room of a patient and both parties were blindfolded – they would have a much greater need to rely on their listening skills to navigate through the conversation. In many ways, this is similar to the challenge that contact center agents face as being the first touchpoint for a patient, digitally. Digital interactions make communication skills, especially active listening, more critical than ever before for contact center agents as they seek to improve digital bedside manner and patient experience.



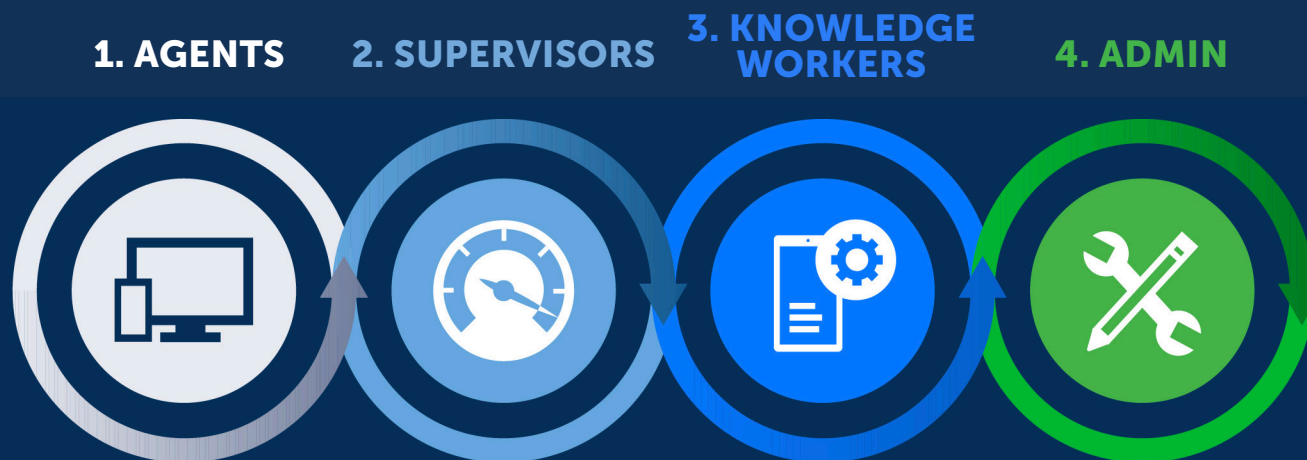
KEEP THE HUMAN CONNECTION TOP OF MIND

According to the 2020 Patient Sentiment Report published by the Medical Group Management Association (MGMA), [52%](#) of patients stated that they wanted their doctor to have at least one of the following qualities: compassion, comfort, patience, personality and bedside manner. With contact center agents now on the frontlines of patient experience, these characteristics are just as important to embody in a chat with a patient as they are for doctors or nurses to display when physically at a patient's bedside. As healthcare contact center agents interact digitally with patients for more complex matters, they are being called upon to sharpen their communication/listening skills, as well as their ability to balance empathy with efficiency, to improve their digital bedside manner.

As agents adapt to the new digital environment, a new challenge arises of balancing efficiency with empathy. In addition to communication skills, empathy is essential to delivering a positive bedside manner for both healthcare providers and contact center agents alike. In the traditional hospital setting, patients are, of course, experiencing pain or discomfort and the feeling of having the provider be empathetic to their situation is critical to the patient experience. Although a patient calling into a contact center can appear to be a different type of scenario altogether (at least in terms of the need to show empathy to a person in pain), that is not always the case. In today's COVID era many contact center agents often interact with severely ill patients who are calling in to determine if they need to be admitted to a hospital.

ARE YOU READY FOR AGENT AND CONTACT CENTER 2.0?

Equipping your customer-facing employees is a game changer. As patients move towards more digital experiences, the role of the contact center agent is evolving. Agents are now expected to be more dynamic and handle a higher number of chat sessions at a time. But what about your contact center environment? Today's agents are empowered to do more and require more than a headset and a dialer to do so. Supervisors and admins require more, as well.



1 Complete set of multimedia capabilities at their fingertips.

2 Skills-based routing, monitoring and reporting along with QA reviews, surveys and next-level agent scheduling to meet customer demands head-on.

3 Arm your employees with the same multimedia communication tools along with an on-the-go mobile application to take the office anywhere.

4 Customize experiences as needed, integrate them into the applications you use as well as legacy communications, port numbers easily and more.

SUPERVISOR EXPERIENCE



THE CHALLENGE OF MANAGING REMOTE EMPLOYEES

Now that many agents are working from home, healthcare contact center supervisors face the new challenge of managing their remote contact center agents to ensure productivity remains at least equivalent to that of a physical office – if not even improved. This is a unique challenge as contact centers have traditionally operated in physically close quarters that enable management to monitor agent performance more easily. Here are our top tips for managing remote contact center agents by leveraging the shift in the workplace environment to further drive operational excellence.

THE IMPORTANCE OF TRACKING THE DIGITAL PATIENT EXPERIENCE

Since telehealth has become a more critical part of the communications strategies of many healthcare systems, focusing on the digital patient experience is now paramount to these organizations. The patient experience has historically been seen as the responsibility of the individual healthcare provider (doctor or nurse, for example) treating the patient in a clinical setting. However, as the COVID-19 pandemic and the subsequent acceleration of digital transformation in the healthcare industry has altered the way in which patients receive care (digitally), the contact center agent's role has evolved to now require 'digital' bedside manner – at least to a certain extent.

True to the saying 'you can't manage what you can't measure,' contact center management has long been driven by data to ensure that daily metrics are met. From speed of answer and average handle time to redirects and abandons, contact center agents have long been held to a high level of performance in order to help contact centers meet predefined service level agreements. But as digital transformation accelerates due to the pandemic, the role of contact center agents is expanding to include increased expectations for delivering on the patient experience.

Due to the increased reliance on technology as the primary means to connect with a healthcare provider, patient expectations for a smooth digital experience have increased dramatically over the last few years. According to a 2019 survey performed by [Cedar](#), patients aged 18 to 24 are three times as likely (61%) to consider switching providers over a poor digital experience compared to the over age 65 population (21%). Now that contact center agents are more often responsible for a patient's first impression of a healthcare organization as a whole, the need for agents to create a positive patient experience digitally is greater than ever – especially since patients are willing to take their business elsewhere if the patient experience does not meet their expectations. In order to meet increasing demands for patient experience, contact center agents must tap into their interpersonal skills and emotional intelligence.



EQUIPPING TEAMS IN A DIGITAL WORLD

Just as remote agents require training to develop new skills in order to be successful in today's new digital environment, contact center management must also account for the shift to managing a team from afar. The traditional physical contact center environment allowed supervisors to keep a close eye on the performance of their team and make adjustments where necessary throughout the day. Now that supervisors are managing remote agents while also working remotely themselves, they have a significant need for communications technology that can help them manage their agents remotely. Healthcare contact centers should seek a UC solution that provides real-time data to make staffing adjustments on-the-fly and quality assurance (QA) monitoring with agent desktop recording to train agents from afar.

In addition to a UC solution that provides robust, real-time insights into the health of the contact center, supervisors must brush up on their certain communication skills as they navigate managing a remote workforce. As supervisors learn to manage their teams from afar and find new ways to keep their teams connected, focusing on improving their communication and listening skills can go a long way.

KEY TOOLS TO SUPPORT LONG-TERM STRATEGIES

As remote work is here to stay, healthcare organizations are now developing long-term strategies to support remote agents. LinkLive makes it easy for healthcare contact centers to keep their remote agents efficient in the new work from home environment while ensuring that patient communications remain secure. Below are five tools essential for the success of remote agents today.



1. MULTIMEDIA AGENT

LinkLive offers a broad range of capabilities including rich digital messaging, a seamless ability to engage humans across channels, and leading voice and video communications with artificial intelligence to power a contact center. LinkLive is a first of its kind innovative chat solution that requires no downloads, no apps, and no accounts/passwords for consumers to manage. The solution modernizes how guests and consumers interact with LinkLive messaging, video, and voice services by easily integrating into their existing websites while connecting to our customers and agent's LinkLive Communicator solution.

2. MEASURING, MONITORING & PLANNING (MMP) PORTAL

LinkLive's Measuring, Monitoring & Planning (MMP) Portal is a unique application for contact center agents and supervisors that utilizes a variety of tools to measure contact center statistics, monitor agent performance and plan scheduling for peak call times.

Successful organizations look to a 360 view of the data to run your communication operations. LinkLive has prebuilt dashboards and reports, saving your teams time organizing data into insights. Measuring, Monitoring & Planning, or MMP, utilizes a variety of tools to measure your customer channel statistics, monitor agent performance, and plan scheduling for peak call times.

3. CUSTOMIZED REPORTING

LinkLive's MMP portal offers a robust reporting feature that enables your organization to produce customized reports that contain a variety of different types of metrics at any resolution. With the ability to schedule reports to automatically run at defined intervals, supervisors/management can ensure that their agents are measuring up to service levels. Reports can be outputted in several formats, including CSV, HTML and XLS, providing your contact center flexibility in the delivery of reports over multimedia (email, secure inbox or file transfer).

4. KNOWLEDGE BASE

As healthcare systems continue to grow and expand their number of clinics, retail care, specialty groups and urgency centers, many call centers face a common challenge: creating an organized space where their agents can easily search and access information during customer interactions. LinkLive Knowledge Base is an ideal solution to help here.

LinkLive Knowledge Base offers frequently used resources with a single click, robust search function that allows contact center agents to quickly find sought-after information. Knowledge Base is an easy-to-use tool that can be updated by each individual clinic or department with pertinent information for their agents in an accurate, organized and fast manner.

LinkLive Knowledge Base is ideal for contact center agents who have the need to reference provider protocol outside of their scheduling software, as it ensures that all information is accurate, up to date and easily accessible.

CHECKLIST: CUSTOMIZING AND CONFIGURING LINKLIVE HEALTHCARE

There are many opportunities available to customize and configure LinkLive services – and doing so will go a long way towards providing the best agent and patient experience. Use this checklist to make the most of LinkLive.

SERVICE CUSTOMIZATION

- ☐ All digital customer service applications have been defined and branded: color configuration, logos, background designs, font size and balloon backgrounds.
- ☐ All media capabilities for each hunt group have been configured.
- ☐ The deployment type of chat has been designed to match the website.
(Note: many pop-out to a new tab while the best design experience offers LinkLive embedded right in your site or app.)

NOTIFICATIONS AND ALERTS

- ☐ The experience of a waiting patient has been defined.
- ☐ Agents have been trained on visible alert and audible queue conditions within the Communicator client.
- ☐ All text, email, and communicator alerts set up.
- ☐ Automatic session routing to Supervisors and Managers has been set up.

CONSIDERATIONS FOR REPORTING:

- ☐ Agent reports
- ☐ Hunt group reports
- ☐ Session reports
- ☐ Disposition reports

TEAM ENGAGEMENT

- ☐ Hunt Groups: The appropriate hunt groups to route chat sessions have been defined.
- ☐ Agents: Agents are mapped with the right skills. (Note: ensure chat sessions get to the person on your team with the associated skill set.)
- ☐ Service hours of operation: Service hours have been addressed and are transparent to all parties. (Note: service hours can be easily adjusted in real-time.)
- ☐ Handling after-hours rules – continue to manage 1/1 relationships after hours.
- ☐ Agent scheduling: Required number of agents defined.

AM I ACCURATELY SCHEDULING AGENTS?

Considerations for Chats:

- ☐ What is the average call length, call volume and your customer service goals?
- ☐ Consider the average delay that is acceptable for incoming callers or inbound chat users to experience.
- ☐ Leave some wiggle room to factor in other items such as marketing or other campaigns, as well as daily call/chat peaks.

Considerations for Calls:

- ☐ Start with the average quantity of traffic you receive on your website each day.
- ☐ A good chat to visit ratio will vary and the ratio will decrease as your traffic increases, so understand the flow of traffic in addition to quantity.
- ☐ On average, websites that receive less than 7K visits and sign-ons per month can count on nearly 450 chats per month while 25K visits may translate to 1,200 chats per month.
- ☐ Align by quantity and timeline to ensure an accurate assessment of traffic and the hours needed for each agent per day and per hour.

FINAL STEPS FOR CREATING OPTIMAL EXPERIENCES

- ☐ Test & retest your hunt groups and agent routing.
- ☐ Pre-fill and prepare your agents with proper greetings and closings.
- ☐ Define a process for exceptions.
- ☐ Assign volume and priorities for each agent.

ABOUT REVATION SYSTEMS

At Revation Systems, we have a passion for making the complex simple and embracing risk to deliver great results. We have a security first mindset and a purpose-built approach to everything we do from our policies and processes to our infrastructure and architecture. Security is at the core of our DNA; both at the organizational level and for the architecture of our technology. Security is not a check box for us, but rather an approach that starts from the ground up and influences every product we bring to market. We take the hard road every time to ensure our customer's data -- in the two most tightly regulated markets -- remains protected.

Our secure solutions have been validated with our HITRUST Certification. For financial providers, HITRUST certification means that the organization in question (including its products) has already undergone rigorous scrutiny and is a verified-secure partner whose technology an organization could leverage for its digital transformation without fear, hesitation or time spent on an additional internal review.

We believe in the power of human relationships and that innovation in communication will connect people to help achieve financial security and live healthier lives. Revation Systems serves hundreds of healthcare and finance consumers in the U.S. with its all-in-one full contact center in the cloud with the ability to drive experience across digital and physical channels. LinkLive is unified communications software hosted in the cloud that offers a broad range of capabilities including rich digital messaging, a seamless ability to engage humans across physical and digital channels, and leading voice and video communications.

We offer the advanced, sophisticated capabilities are expected in a contact center like skills-based routing, session recording, workforce planning, agent scheduling, and quality monitoring tools. We also offer a broad range of digital capabilities from chat, secure mail, and co-browsing to the ability for digital users to engage the physical channels and humans at a healthcare organization. Since its founding in 2003, Revation has been dedicated to the belief that the quality of communications can be increased, while the costs and hassles can be decreased, using virtual communications with a cloud-based platform.



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