

# DALBAR

Customer *X*perience  
Audit



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DALBAR, Inc.

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Coronavirus & the Contact Center

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CXA Summit Series

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March, 2020

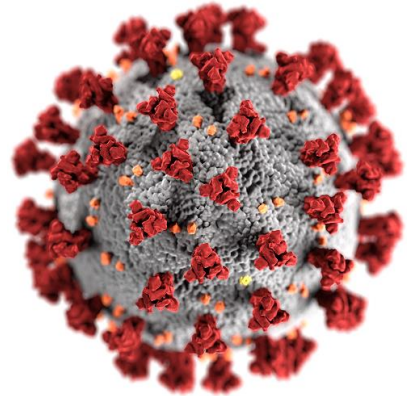
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## Introduction

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In recent weeks, the coronavirus (COVID-19) has disrupted all aspects of American life and the American workplace. The financial services contact center is no exception.

In response to the pandemic, DALBAR hosted a town hall on March 18<sup>th</sup> for contact center managers across the financial services landscape to discuss how their firms are dealing with the crisis. As a follow-up to the discussion, a survey was conducted from March 19<sup>th</sup> to March 20<sup>th</sup>. This report reflects the results of that survey and other important elements from our Coronavirus Town Hall.



## Office Closures

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The majority of offices (69.2%) were still open as of the time of our survey. 30.8% of offices had closed due to the pandemic and/or state and local orders.

The offices which did remain open, however, did also take special steps to deal with the pandemic. Representatives coming into the office have been physically spaced out to allow them to practice social distancing within the office. To make more space, representatives that had the capability to work from home were asked to do so and at least one company activated a disaster recovery site to which a portion of their workforce was redirected.

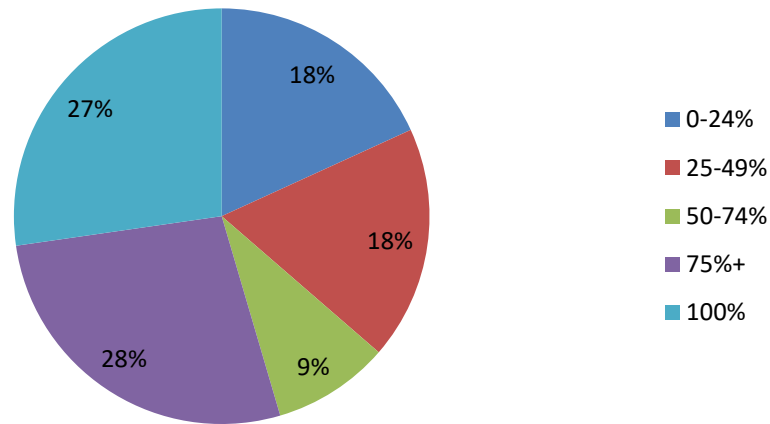
Additional cleaning and sanitization has been used to help minimize the risk of spreading the virus within the office. Cafeterias were still operating.

## Work-at-Home Capability

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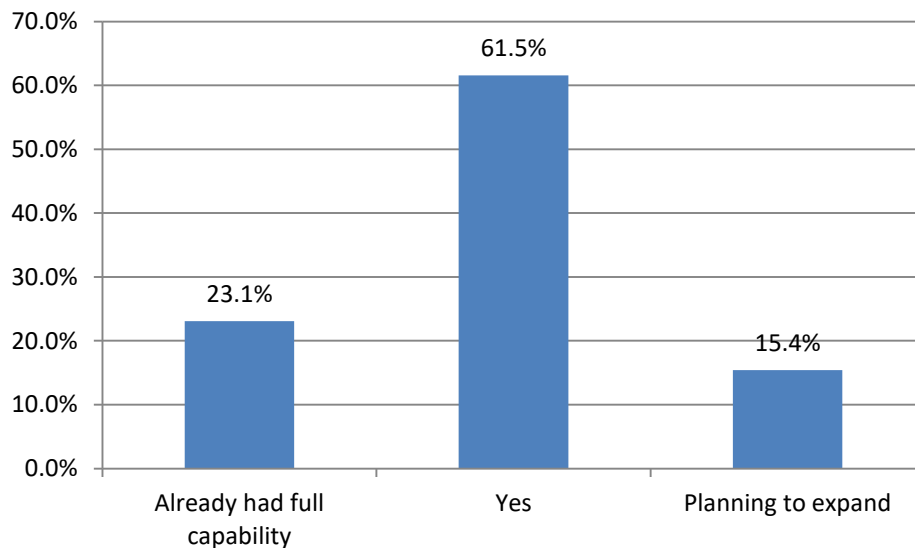
Allowing representative's to work remotely has been a key part of many organization's pandemic responses. The trend toward remote contact center representatives we have been seeing in recent years, and which has been part of many firm's disaster recovery and business continuity plans, certainly helped minimize disruptions. The chart below indicates companies pre-pandemic work at home capability.

## CSR'S CAPABLE OF WORKING REMOTELY PRE-PANDEMIC



Respondents were also asked if they had rapidly expanded work-at-home capacity in response to the pandemic. All firms indicated that they had full capacity prior, had increased capacity, or were planning to increase capacity.

## HAVE YOU RAPIDLY EXPANDED WORK-AT-HOME CAPABILITIES



One town hall attendee had impressively gone from 0% to 100% work-at-home in only 48 hours. Another attendee noted that she had been trying to get work-at-home approved for some time without success but that it was quickly approved in response to the virus.

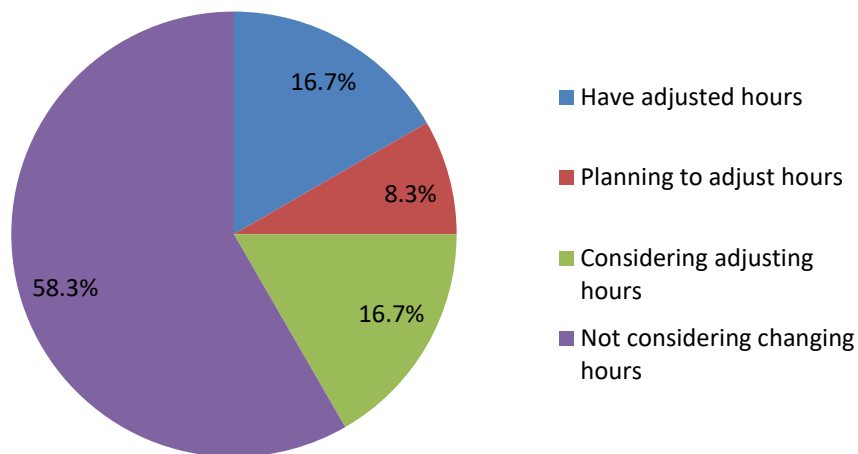
Technology issues, including call recording capabilities, were the primary obstacles noted in the rapid expansion of working remotely. The industry’s gradual move to voice over internet (VOIP) helped many firms make the transition as call routing and recording were easier to manage.

## Adjusted Hours

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Along with the shift to a remote workforce and social distancing in the office, a number of companies have or plan to adjust their hours, as reflected in the chart below. Those companies with longer hours were more likely to reduce them in response to the pandemic.

### ADJUSTED CONTACT CENTER HOURS OF OPERATION

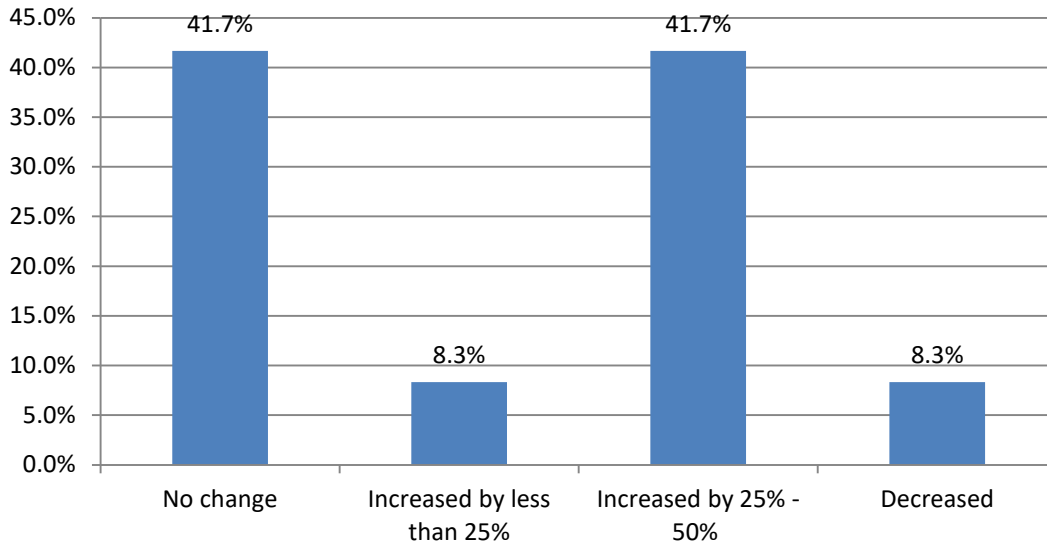


## Call Volumes

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In addition to the public health concerns, the coronavirus pandemic has led to a high degree of market volatility and declines. Companies were therefore also asked if they had seen an increase in call volume since the pandemic began. Only half of firms reported an increase and some even saw call volumes decline. No companies reported increases of more than 50%.

## INCREASE IN CALL VOLUMES



## Staffing Levels

Most companies were able to maintain staffing levels since the pandemic began, and some even saw an increase to contact center staff, as indicated in the table below.

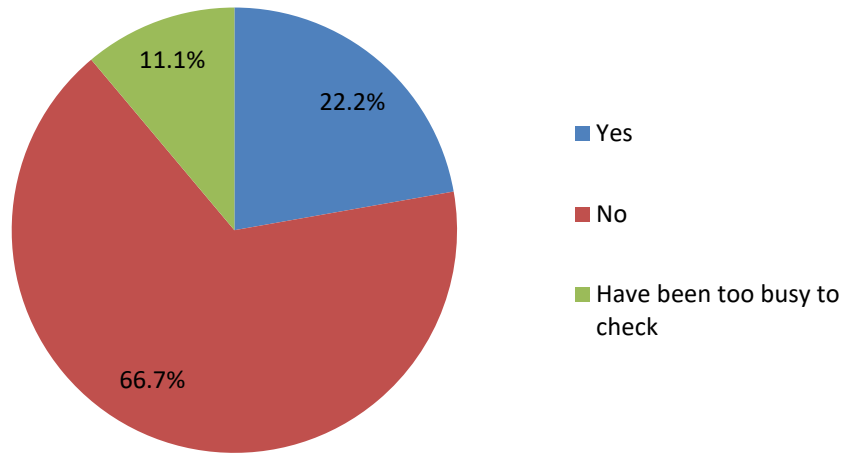
### CHANGES TO STAFFING LEVELS

No change	58.3%
Increase by less than 25%	25.0%
Increased 25% - 50%	8.3%
Decreased	8.3%

## Fraud Attempts

During times of crisis there are often bad actors looking to take advantage of the situation for their personal gain. Respondents were therefore asked if they had seen an increase in fraud attempts since the pandemic began.

## INCREASE IN FRAUD ATTEMPTS



## Training

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Another challenge brought up by participants on our Town Hall was training. Where possible the classroom portion of training has been transferred to online. Some companies already had their training in a suitable format for online learning while others had to quickly adapt existing modules.

On-the-job training has been more of a challenge. Companies have adapted by using conference call capabilities combined with instant messaging for tenured reps to communicate with new hires while they are interacting with customers. At least one company was looking to use the screen capture functionality built in to their recording system to allow the tenured rep to see the new hire's screen during such sessions.

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