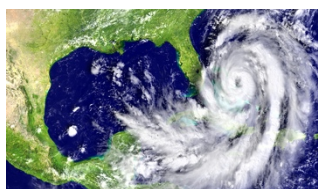


7.7 CONTACT CENTER INFORMATION

7.7.1 FACILITIES

Are you open 24x7? If not, what are your hours and days of operation?

Yes, as an on-demand contact center provider, we operate 24/7/365. With agents located across the United States and Canada, we offer a well-dispersed, onshore workforce that accommodates always-on clients and their customers. This is especially important as climate change continues to disrupt business. Traditional call centers, which are geographically bound, often find their operations in harm's way of blizzards, hurricanes and wildfires. The versatility of the on-demand contact center model adapts to volatile situations in real time, whatever the weather or circumstances.



For instance, when Hurricane Matthew struck in 2016, one of our consumer services clients had to evacuate call centers in the Caribbean and Florida. Working around the clock, we reached out to our remote agents in unaffected areas of the U.S. to handle the shifting workload as the storm played out for more than a week.



Given it's hurricane season now, it's worth reading a timely piece by April Wiita, vice president of Program Success at Working Solutions, posted in *Contact Center World*: ["Brace Yourself - 2019 Hurricane Season Begins."](#)

Do you have blended seats capability?

Yes, we do have blended-seats capability, if by blended seats you mean multiple channels. We do have several programs that in any given shift the agents do inbound and outbound. We have had programs in the past that have done voice, chat and email.

Total number of seats and the percentage of business inbound vs. outbound.

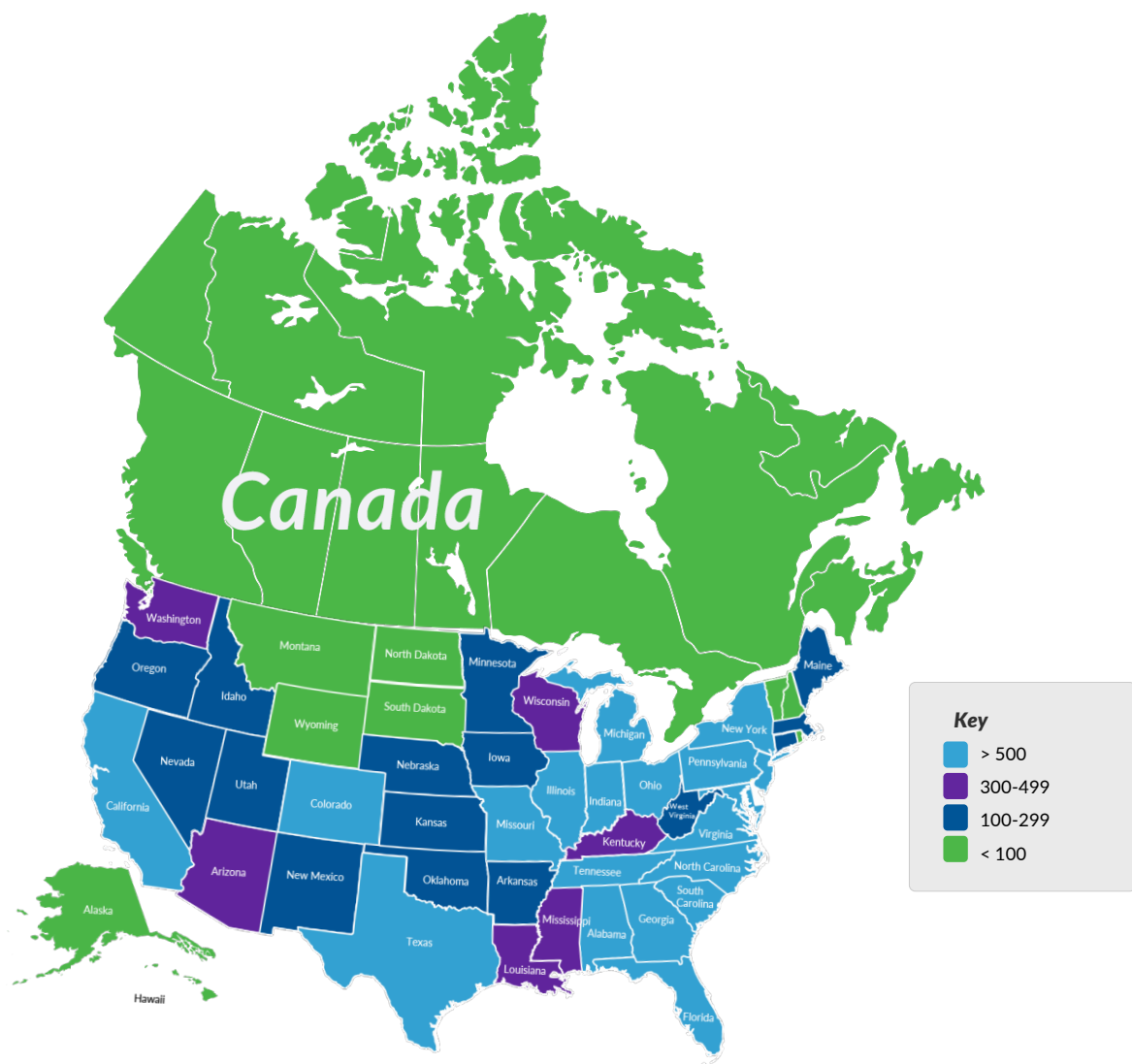
Unlike traditional call centers, we are not restricted to a certain number of seats in facilities because of our virtual network of agents. This enables us to be more flexible and responsive, whatever service situation should arise.

As for the percentage of inbound vs. outbound business, those numbers are 46% and 0%, and inbound/outbound blended 54%.

How many contact centers sites? Locations? Number of seats per location?

As stated earlier, Working Solutions does not have brick-and-mortar call centers, which have limited resources. Instead, our remote agents are part of distributed workforce, operating with great scale and flexibility through a virtual network 110,000+ strong that spans the United States and Canada.

Our business model, which we've perfected over 23 years, enables us to marshal agents on short notice to handle spikes in service or emergencies, such as nor'easters and hurricanes. Limited by their size and set number of seats, traditional call centers cannot ramp up or scale down on-demand like Working Solutions.



7.7.2 TRAINING

How many trainers do you have? Requirements to be a trainer?

We use degreed educators (featured below) as our instructors. Everyone has a minimum of a bachelor's in education and quite a few have master's degrees. All of them must have at least five (5) years of classroom experience before joining our Education and Development team. They're well-versed in the virtual classroom and long-distance learning, as are their teaching assistants.

Education & Development Team



Working Solutions University



KATIE AGUIRRE
B.S. in Education



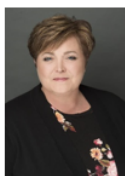
JENNIFER BROWN
B.A. in Education



ED MULLINS
M.A. Master of Education



HEATHER BAKER
M.A. Master of Education



CANDY PERKINS
M.A. in Information and
Learning Technologies



DAMIAN CRUZ
B.S. in Education



STACY WAGGONER
M.A. Master of Education



CRYSTAL HOLMES
M.A. Master of Education

To gain more insight into their expertise, here are a few profiles of our educators:



[Jennifer Brown](#) – Jennifer is an expert in educating remote, on-demand agents.



[Crystal Holmes](#) – Crystal knows how to use virtual flips to further agent education.



[Stacy Waggoner](#) – To instruct agents well, Stacy believes the smallest things matter.

Describe in detail your training curriculum for CSRs. How long is your new hire training?

Collaborating with the Zillow customer service team, professional educators at Working Solutions will learn and then adapt your agent instruction to the virtual classroom.

This process entails several components:

1. **Train-the-trainer (TTT) sessions** – Our educators will coordinate a time to fly to your facilities and meet with your head instructors to review all of the training materials. They also will discuss Zillow's brand so we can immerse our agents in your culture, which is essential for success. This way, agents become an extension of your brand.
2. **Curriculum Development** – Educators will develop a customized curriculum to present it in a virtual environment. They will take everything learned during TTT and replicate it for agents. We will strive to keep the same topics and timeline of what Zillow does. We just change the way the content is delivered. We may use gamification on certain topics to drive home those subjects for better retention.
3. **Education** – We will instruct agents well in the Zillow curriculum. Then, there will be a final, comprehensive test and role-playing with an instructor to ensure agents are ready for live calls. After they pass, agents will go into nesting and apply SALT (strategic agent learning techniques), which reinforce what they were taught in the virtual classroom while taking live customer interactions.

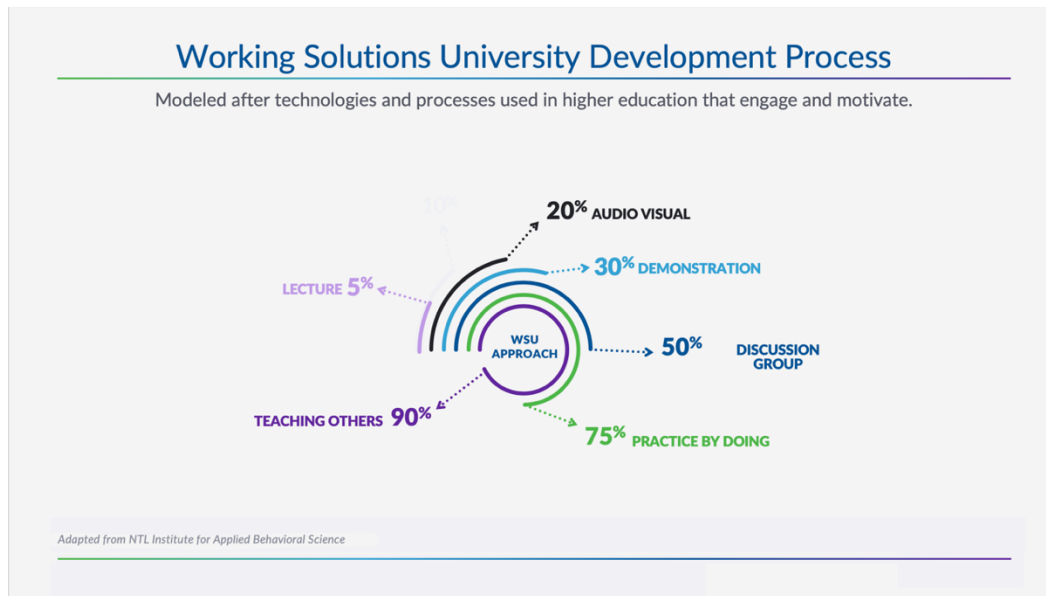
For new agents to Working Solutions, we have one to two days of prework they need to complete. Then, we will mirror your internal training timeline for all agents.

Describe your training strategy including all delivery methods for content facilitation.

Agents, like all students, learn at their own pace, in their own ways. Our educators know that and will incorporate several basic teaching techniques to educate them in the Zillow program. They include teacher-led instruction, guided practice and individual practice.



Our educators also know that some agents are visual learners while others are auditory. Reading and writing certainly play a part, as does kinesthetic learning. Point is our educators take these differences into account, as the chart below illustrates.

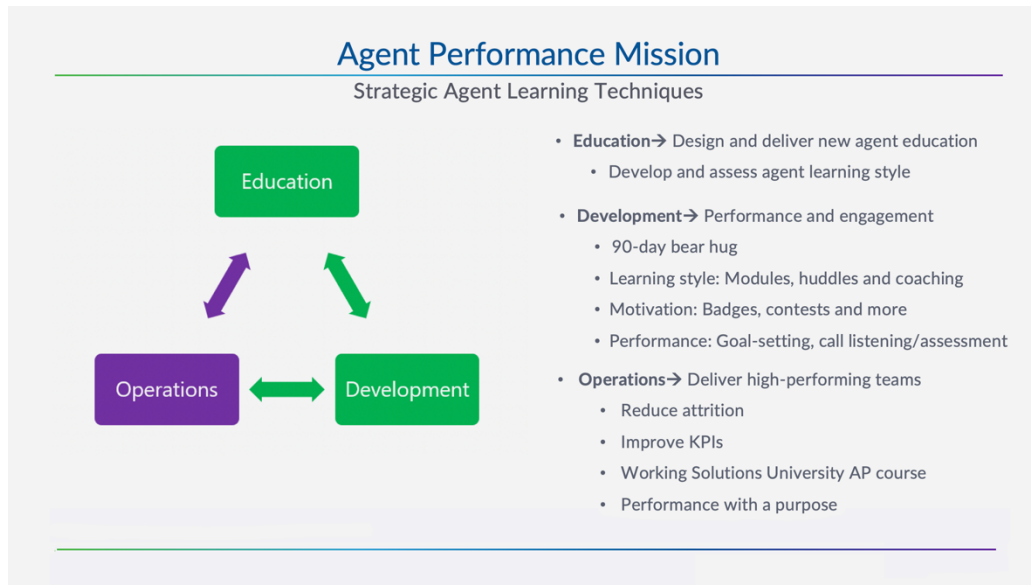


At Working Solutions University (WSU), we employ a learning management system (Canvas) to engage and motivate all agents. Teaching methods encompass games, simulations, micro-learning, role-playing and more.

After the initial curriculum instruction, our Development team, again made up of educators, will continue to coach agents, honing their skills to improve ongoing performance for Zillow.

Describe the training services you provide inclusive of content management and curriculum development processes.

We've touched on content management and curriculum development in earlier questions. It's worth noting that agents can be educated in service and sales for a client since they often merge. We factor such things into our educational process, outlined below.



Also, worth noting here is our approach to class size and its impact on agent education. Depending on the client, we try to limit the class to less than 40 agents. This way, all agents will be able to have individual interactions with the educators and their assistants. For large peak ramps, however, we do go up to 50 to 55 agents. We will have one (1) main, degreed educator and one to two (1-2) teaching assistants.

Whatever the size of the virtual classroom, we always strive to make learning personal for agents and customized for the client program. The platform we use and the ways our educators teach increase the effectiveness of the learning.

For instance, a class of say 22 agents can be broken into smaller, interactive groups when needed. An educator can divide it into teams of five or six agents for group discussions—or put agents into 11 groups of two for one-on-one role-playing.

While the agents are in the smaller groups, the teacher and assistant are able to go in and out of each virtual session to ensure everyone is on the right track and answer any questions. Then, the teacher can click another button and bring the entire group back into one classroom for additional educator-led instruction. That advantage is one of the major reasons our educators opted to move forward with the WebEx platform.

Describe in detail your process for measuring the effectiveness of training. Describe how you identify knowledge and/or skills gaps within your employee base and your process for course recovery.

By this point, we presume you actually mean any knowledge or skill gaps in the Zillow agent workforce being educated by Working Solutions—and not our employees.

To that end, we start out stating the desired client metrics for all agents to achieve. They are baked into agent education from the outset. Goals then are set accordingly to meet or exceed these performance goals.

Monthly audits of quality evaluations are completed for each agent. Agents receive evaluations that are often dependent on their previous month's or quarterly performance. More evaluations are provided to agents who are struggling; fewer are done for those who excel. Listening sessions and independent calibration are encouraged to make sure all agents fully understand how to be successful in each skill needed.

Internally, the monitoring of agent performance occurs daily. We report all scores in real time and share the results with the agents as completed. On a weekly basis, the leadership team will review overall results and act as needed. We evaluate overall and individual results at the end of month as well. All action plans are created based on agent trending and compliance.

Taking it a step further, we will conduct weekly calibrations with the service team and separately with Zillow.

7.7.3 QUALITY

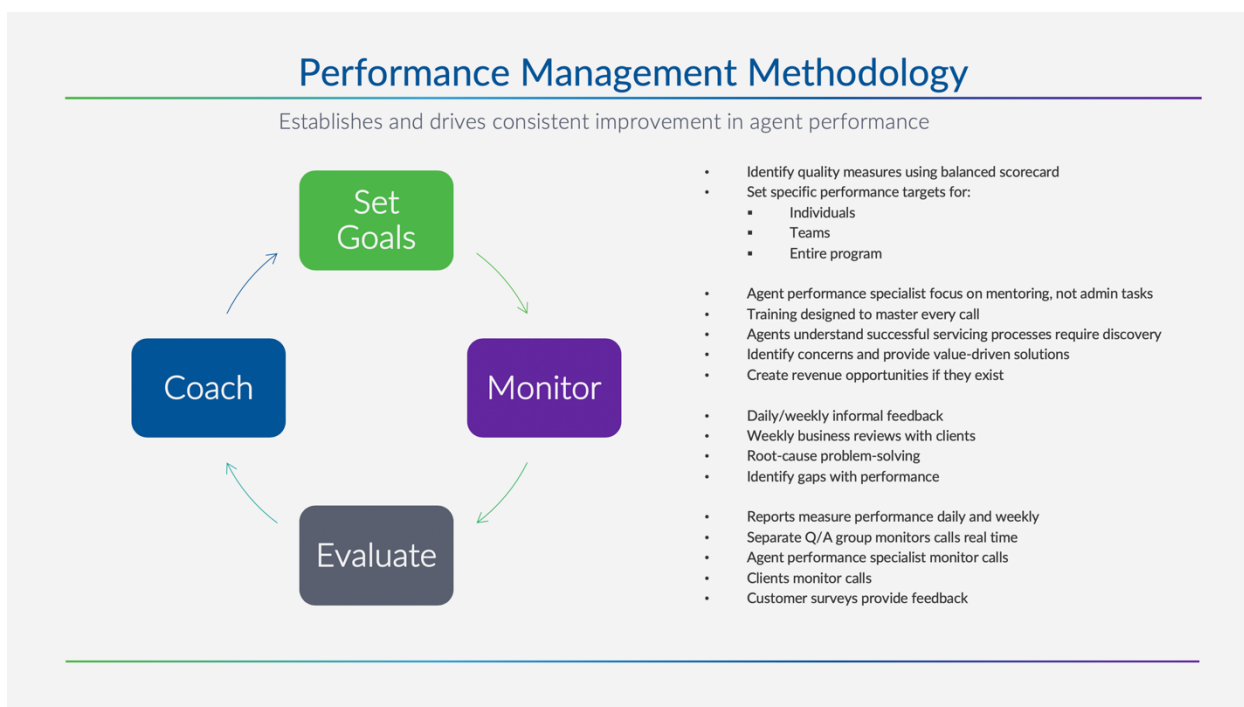
Do you have remote monitoring capabilities? Can clients dial in at any time?

Yes

Do you digitally record all calls? If not, what percentage?

Using the Bright Pattern Platform, all calls will be recorded and stored for 90 days. Recordings can be exported for longer storage requirements.

Describe your change management process and practices.



Describe Quality Assurance process.

Within the first 30 days, all agents will receive their initial development through our SALT (strategic agent learning techniques) program. This SALT team will provide the performance and engagement for all agents immediately after the initial training. During this period, agents will receive coaching either through modules, huddles, self-evaluations and/or one-on-ones to meet their individual learning styles. Agents will be motivated by badges and contests so each one can achieve goals and assessments during this time. During this time and afterward, our Quality team works closely with the SALT team to review agent performance, outliers and areas of opportunity for coaching and ongoing education. The Quality team will share metrics and expectations with the Agent team daily. This keeps the team members in the loop on how agents are performing, compared to the group average and program expectations. Agents have access to their own QA scores on Vyne (our integrated agent portal) to assess and improve performance.

Describe processes for call monitoring and expected and realized benefits of the interaction monitoring process.

Internally, the monitoring of agent performance occurs daily. We report all scores in real time and share the results with the agents as completed. On a weekly basis, the leadership team will review overall results and act as needed. We review overall and individual results at the end of month as well. All action plans are created based on agent trending and compliance. Taking it a step further, we conduct weekly calibrations with the team and separately with our clients.

Describe the agent feedback process and monitoring thereafter.

Monthly audits of quality evaluations are completed for each agent. Agents receive evaluations each month—often dependent on their previous month's or quarterly performance. More evaluations are provided to agents who are struggling and fewer are done for those who excel. Listening sessions and independent calibration are encouraged to make sure all agents fully understand how to be successful in each skill needed.

What percentage of calls are monitored on a monthly basis?

Depending on requirements, we monitor 2 to 3 calls per agent per month. Additional monitors may be done if agreed on by both parties.

Ratio of Quality Assurance Analysts to Agents?

30:1- in some cases 25:1

The Working Solutions Quality Assurance (QA) team would be dedicated to the Zillow program. Processes will change and evolve over time. During the program launch, our team members would work closely to understand client needs and expectations. The team would review calls prior to go-live to gain an understanding of the call flow and desired results. They would do some pre-calibrations to ensure Zillow and Working Solutions are aligned on the form and expectations.

We do not have a one-size-fits-all approach to quality. We use a combination of our best practices—coupled with client needs. We can adopt Zillow's current quality form, system and program on our end or collaborate to create the form.

Our Quality Assurance team and its role are designed to support agents, ensuring a high level of customer satisfaction. Team members monitor a specific number of calls per agent each month to deliver the best level of quality, and if needed, coach agents to improve performance.

The Working Solutions QA team is in constant contact with the Program Management team to ensure success. This ranges from Education to Recruitment to Operations to Development. Our leadership team will review agent calls across the board to better understand the voice of the customer and agent needs. We strive to kick off team calls with random call reviews, believing all levels of the company are responsible for improving quality.

The following image is a quality comparison. This client has multiple partners: offshore, onshore, internal and Working Solutions. We consistently outperform every contact center operating for them.



7.7.4 PERSONNEL

What is the average tenure for Agents?

On average, an agent works with us for several years, with the mean being 2.8 years. During that time, an agent might be assigned to only one client or work for several, depending on the duration and requirements of the programs. A number of agents have stayed with us for five years. In fact, it's not uncommon to have agents with a tenure of 10 years at Working Solutions. Beyond that, there are even agents celebrating 15 years of customer service with us. Chief executive Kim Houlne makes a point of recognizing agent milestones.



[Enit | Agent since 2001](#) – Resource leader in the communications industry.



[Kathleen | Agent since 2007](#) – Works as a corporate travel agent.

Please describe all languages you can support.

At one time or another, we've supported more than 30 languages to engage our clients' customers. Seeking bilingual agents is built into our corporate culture. During the agent profile assessment, there is a language component that tests comprehension. In the live interview, a talent specialist will assess the fluency—spoken and in writing—that an applicant claims in a particular language. We contract out some of the testing if Working Solutions does not have a talent specialist fluent in that language. The most prevalent languages that clients need are English, Spanish and French-Canadian.

Besides being fluent in a desired language, we also know it's important for agents to “speak the culture” of a client's customers. That means understanding the nuances and subtleties of a client's customer segments, as well as any regional influences.

What is your overall annual turnover rate and by each site? Define your turnover calculation how you factor agent turnover.

Again, Working Solutions does not have call center sites, so we cannot provide those numbers. Our on-demand workforce is virtual and distributed. On average, we run about 8-10% attrition each month and 105-130% annualized.

How do you motivate your Agents to increase sales conversions?

Whatever the task, we motivate agents with rewards to drive superior client performance. Ongoing incentives are worked into their pay structure, and modified accordingly, to achieve desired targets.

For example, at one client, we review the pay structure every six (6) months to ensure: 1) it still makes sense; and 2) agents are being rewarded for the right things. Such incentives create friendly competition and promote teamwork. Individual performance stats are posted daily to both champion and challenge agents. They appreciate knowing where they stand, what needs improvement and being recognized for great work. This approach accomplishes a couple of things: 1) lets the stronger agents act as mentors to those who need help; and 2) bonds the team as a more cohesive unit and increases agent retention on a program. What's more, incentives—achieved or missed—factor into an agent's ongoing program education and performance plans.

Also, we create a VIP perk for our top-performing agents. Several of our programs have enough weekly hours to allow for a VIP schedule option. This gives the best agents a priority-boarding option at the schedule drop. Priority boarding offers first pick and the opportunity to schedule more hours than the standard schedule.

In addition, performance expectations are reviewed monthly, at which time agents can be added or removed from a client program. We have found this to be successful in driving sales and other key metrics.

What is your Agent/Supervisor ratio?

This varies from program to program. On average, it's 15:1 or 20:1.

Are your Agents dedicated or shared? What is the percent share vs. dedicated?

Our agents are dedicated to each client program.

Describe programs designed to facilitate employee retention inclusive or employee morale, recognition and overall management of turnover.

As a company, Working Solutions regularly recognizes employee and agent contributions, knowing success is tied to both.

To reduce turnover for agents and employees, we carefully screen all applicants at the outset to ensure a good fit. For employees, a service mindset and professional skills influence hiring. For agents, we look at talent to task, making sure they align with a client's culture, customers and program requirements.

Employee milestones, such as job anniversaries, are celebrated, along with monthly get-togethers. Bonuses are tied to individual job metrics and company performance.

For agents, we motivate them with different perks and spiffs. To focus here on a handful:

- Spotlight agent of the week with a photo, name and tips for peers.
- Put on monthly performance parties and announcements of agent successes.
- Use agent portal (Vyne) to call out outstanding talent for all agents to appreciate.
- Feature agents on [jobs/workingsolutions.com](https://jobs.workingsolutions.com)—with profiles of their work.



[Marilee | Agent since 2014](#) – Works to put customers at ease.



[Beth | Agent since 2006](#) – Brings 20 years of travel experience.