

Best Practice - Video/Remote Teller Station Set Up

January 2022

Video Teller Station Set Up

This document provides design guidance for the set-up, preparation and delivery of a high quality, interactive video teller experience to a financial institution's Interactive Teller consumers. The audience for this document includes Financial Institution Call Center Operations management and staff, Teller Operations management and staff, and Financial Institution Facilities resources.

Cubicle Set Up & Design

There are many items to consider when setting up the remote teller center work spaces. In the next sections we will discuss set up, design, surroundings and other items to consider. Also included are examples of teller station set ups.

1.1 Cubicle Area

Appropriate typical cubicle sizing typically ranges from 5ft x 4ft to 8ft x 6ft. Cubicle design varies so there is no specific "standard" for placing cubicles in buildings. The space should provide adequate space and feel comfortable to the Teller. The workspace needs to ONLY be large enough for the teller to perform their function comfortably, if the space is too large there is a chance there will be unnecessary desktop clutter. Desk drawers can be added to the space to be used for administrative needs and personal items

- Access to the cube is from the 4-6 foot side **with desk and monitor along the length**
- The walls should be high enough to shield video teller from distractions and noise
- ELIMINATE the option for individuals walk behind the video teller

There have been financial institutions who opt for adjustable height or standing desks, these options have worked well.

1.2 Seating

Keep in mind that the teller will be seated when on duty, which is a change from standing the majority of the time in a branch. The call center teller seating should have good, comfortable support so the video teller can comfortably position themselves and sit up properly.

- Seating should provide good lower back support to enhance the video teller's posture and appearance on screen, as well as provide comfort



- Seating should provide easy access to the video teller workstation, and other useful information in the workspace, while still maintaining a good video presence to your customers/members
- Seating should not 'squeak' or cause undesirable background noises

1.3 Workstation monitors

The goal when setting up the monitor in the space is to optimize and formally frame the video teller in the camera. Teller workstation monitor(s) should be immediately in front of the video teller and should not require the video teller to turn away from the camera.

1.4 Camera position

Teller station camera position should be at eye level. Microphones and boom microphones should be 'hands free' and should not require keying or manual manipulation to enable a Teller's audio. Camera position should be at eye level.

1.5 Environment

The back wall, or backdrop, is usually a light color, a logo or branding in the background is ok as long as it's not "busy" and does not interfere with the image of the video teller. The view behind the video teller should be clean and uncluttered. Too many images in the background could interfere with the clarity of the video. There are many financial institutions that have successfully incorporated their logo graphics in the background, positioned and optimized to frame the remote teller.

NOTE: Currently we have not tested virtual backgrounds with Interactive Teller, some FI's have tested but we have no usable feedback to draw conclusions.

Video tellers should keep their work space neat and clean with no personal items in the camera's view. Post-it notes, memos and other clutter should be avoided, the PC monitor already contains a number of windows and graphics. Additional items can make the screens appear unorganized.

1.6 Lighting

The goal of proper lighting is to have sufficient illumination with no strong or residual shadows. Lighting is generally from above and out front to minimize shadows and ensure video teller stands out. Illumination from windows is acceptable as long as there are blinds that can be closed. Do avoid having video tellers face windows.

To provide the most accurate range of colors to the end user consider using warm, white fluorescent or incandescent bulbs instead of standard office lighting.

- Placing the light source in front of the video teller will improve visibility to the remote consumer; avoid placing the light source directly behind the video teller



- Overhead lighting location should be considered carefully to minimize the 'halo' effect or the appearance of darkened or shadowed features. If local office lighting does not provide lighting to face and torso, consider an additional direct light source or eye-level placement of workspace lighting
- Consider the video teller's skin tone when adjusting the lighting in the workspace

Sound Considerations

2.1 Sound Management

The management of sound pollution is a very important factor for designing and maintaining efficient workspaces for inbound call centers. Adjacent video tellers are also speaking to your consumers and can generate background noise. Care should be taken that the adjacent agent is not disturbed by the interactions of others. Also keep in mind what is going on in, and around, the location where the teller station will be set up.

Sound abatement, or decreasing or diffusing sound, is important with many individuals in an area all speaking to consumers. The ceiling is the best place for initial sound absorption, as large areas can be covered. Another consideration is installing acoustic panels. Acoustic panels absorb sound and reduce echo. Acoustic panels are used to reduce noise and control sound in many different spaces. They come in a large variety of sizes, types and colors to meet your design, budgetary, and durability requirements.

Positioning these panels behind the video teller's monitor(s) and on each side of each video teller can also minimize noise transmitted to other teller stations. Distributing sound abatement works better than absorption clusters. Another consideration is placement of multiple video tellers with empty cubicles or spaces between them to decrease sound.

Acoustic panels can be suspended from or adhered on the ceiling, adhered to surrounding external walls and/or placed as partitions.

2.2 Headsets and microphones

Headset technology has developed significantly over the last few years, incorporating noise-cancelling and wireless capabilities. Enterprise Call Center headsets with noise cancellation microphones are recommended. Noise cancelling filters out background noise from your environment, so the end user gets an improved audio experience. Headsets with quick disconnect features allow the video tellers to share workstations but use individual headsets and microphones.

Using a two-ear headset, duo (binaural) headset, is particularly good as it reduces background noise and ensures a crystal clear conversation. When using a duo headset, sound is directed into both ears of a user on the telephone. Employees are fully focused on calls and will not try and speak even louder in order to hear the person on the other end.



If wired headsets without a direct USB connection are chosen, a USB adapter must be purchased as well; if you purchase a wireless headset the USB adapter is not need as the wireless headset cable connects directly into the computer.

The quick disconnect adapters and the USB audio, differ by brand only, so the listed adapters can be used with any model of that brand.

Bluetooth wireless headsets can also be considered. Ensure tellers actively charge headsets and place them on the charger when going on breaks and at shift end.

2.3 Teller workstations

Locate all Teller workstation CPUs on the floor or away from microphones and headsets. Noises from fans and other electronics can be picked up by the video teller's microphones and broadcast to the consumer on the other end of the video feed.

2.4 Quiet zones

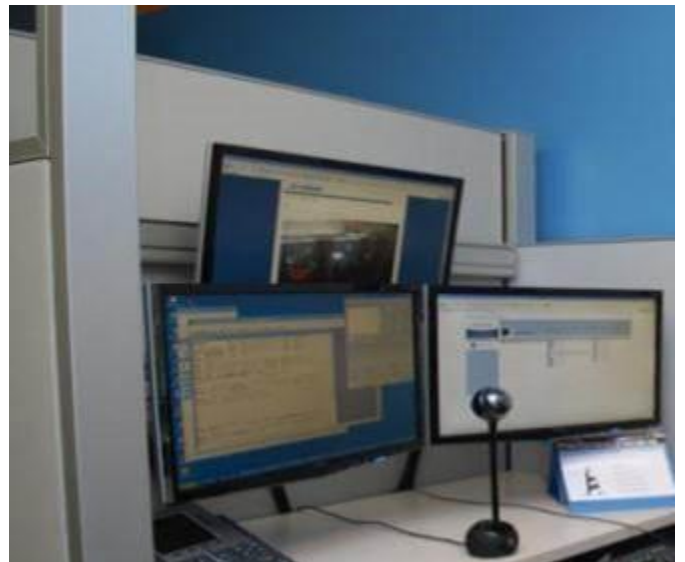
Establish the Call Center Teller area as a 'quiet zone' by placing signage, or other indicators, that communicates the area allows minimal noise. Also consider separate work areas for video tellers when not actively responding to consumer sessions.

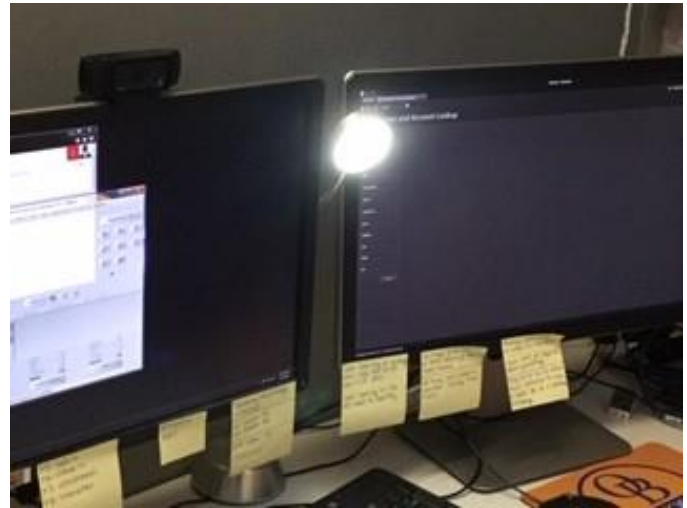


Teller Station Set Up

3.1 Workspace

Below are examples from different financial institutions with good examples of teller center cubicle set up. Small spaces are best with just enough room for necessities.





Teller Workstation Recommendations

Teller Workstation Recommended Cameras

Cameras come to market often and many will work with Windows and the NCR teller applications. The top manufacturer for cameras is Logitech.

Use the following requirements when choosing a camera.

- Field of view – 60 degrees
- Glass Lens vs Plastic Lens

Teller Workstation Recommended Headset

An enterprise level, call-center headset must be used to ensure the highest quality audio is transmitted to the customer. The top manufacturers of headsets are *Jabra* or *Plantronics*.

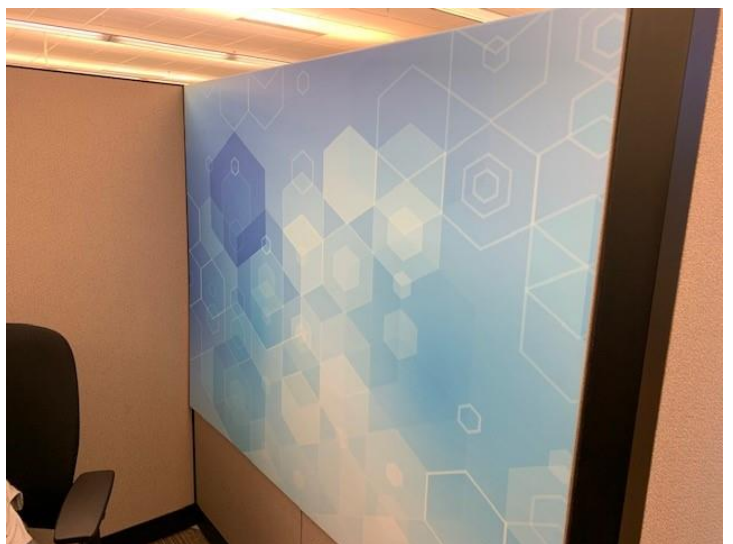
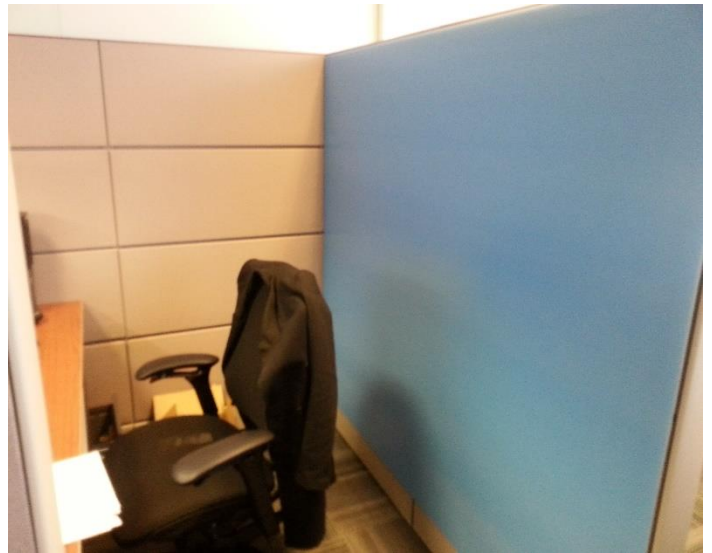
Use the following requirements when choosing a headset.

- Noise Cancellation Microphone
- Quick Disconnect adapter on the headset
- Quick disconnect to USB audio processor New headsets come to market often, and many work with Windows and the NCR teller applications.



3.2 Background

The following pictures show examples of backgrounds, branded and non-branded, that work well



Collapsible/Portable chair backdrops work too



3.3 Interactive Teller Dashboard

The *Interactive Teller Dashboard* can be used by operations managers to perform in-depth, real-time monitoring for evaluating teller performance and determining staffing levels and needs. This program is included in the NCR Interactive Teller SW suite.

Dashboard provides real-time display of video teller session information, enabling the display of current system status to tellers and operations managers via wall or ceiling mounted monitors.

Video Teller session information displayed

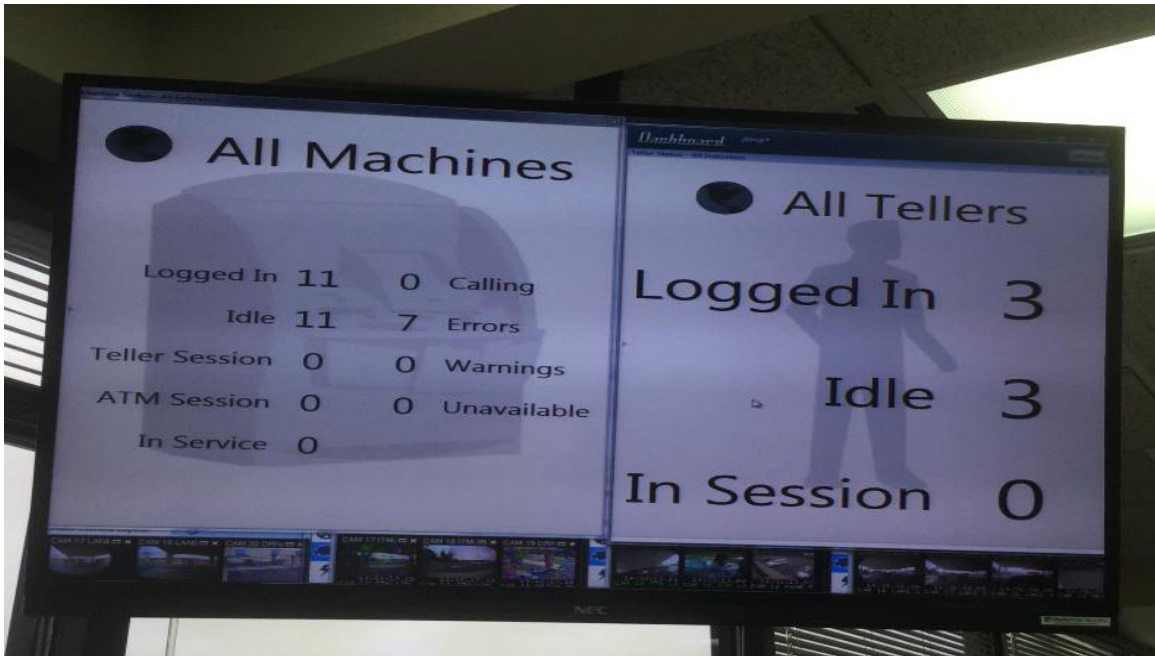
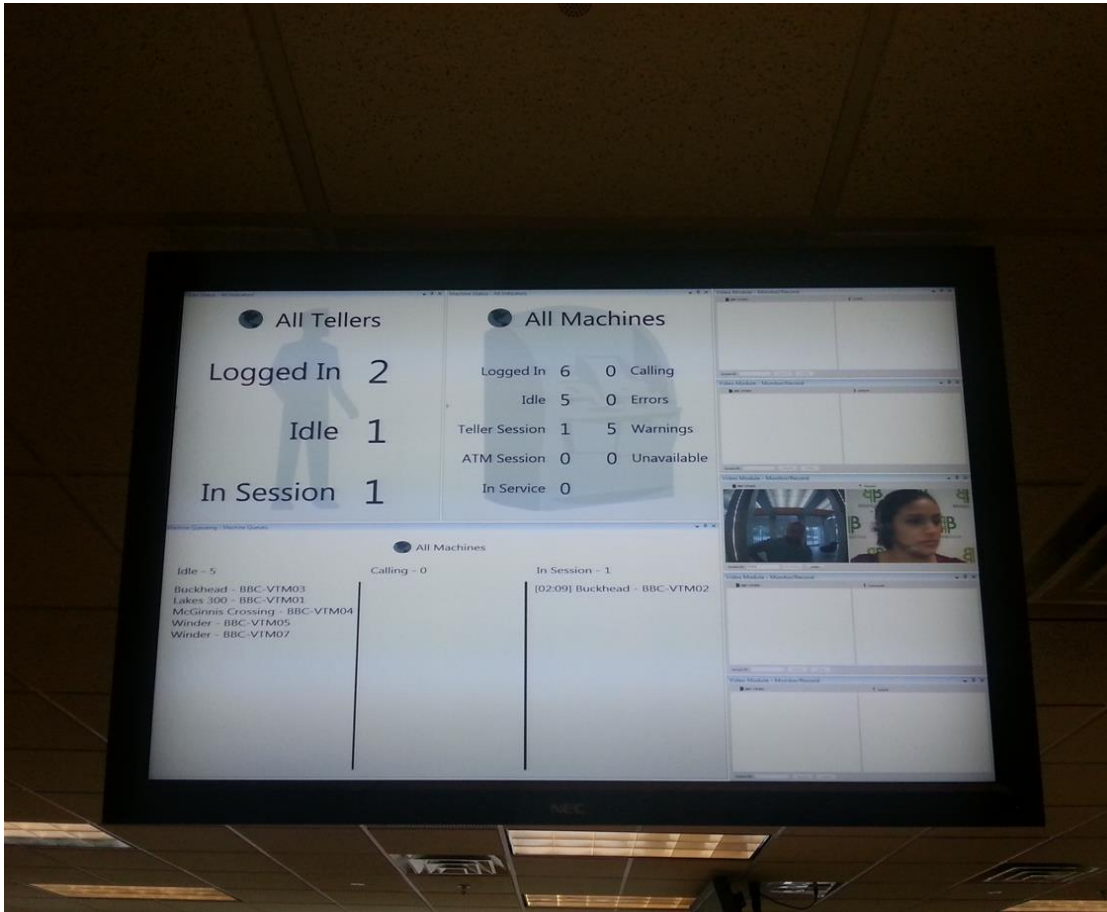
- Number of live sessions
- Number of customers in queue
- Video Teller activity (in session, idle, logged in)
- ITM errors

Dashboard allows

- Selection of pre-defined views
- Displaying specific information about the system
- Custom configuring of display monitors.

The following pictures show a couple of examples of how the Dashboard program can be implemented.







3.4 Interactive Teller Security Camera Feeds

Interactive Teller security camera feeds can be used by the teller center manager to show are views of different drive up locations.

Security feeds assist in

- Monitor exterior surroundings of locations where ITMs are located, for security purposes
- Monitor drive up lanes for a view of the queue

The Dashboard view will show how many users are in the queue based on how many users have touched the ITM screen but not any one behind those at the unit. Security feeds help fill this viewing gap.



