Are Your Coaching Methods on Target?

Coaching Practices and Tools for Today's Environment

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Although agent development is one of the most important responsibilities of a contact center supervisor, coaching practices and technology have received surprisingly little attention in trade journals and conferences. There seems to be an implicit assumption that coaching is more art than science and therefore methods are best left up to the supervisor. Sometimes this works but too often the results are a lack of consistency and the absence of any objective measure of success. In this paper we will advance the notion that today's contact centers are faced with multiple challenges and that success often comes down to the effectiveness of personal one-on-one coaching. Further, we contend that coaching must be carefully tailored to the needs of each individual.

In this paper we review key trends that are driving contact center management to re-think coaching practices and technology. For reasons outlined in the text we contend that now is the time to transition to targeted coaching. This means collecting the most pertinent data to identify the specific causal events that may be causing individuals and teams to miss today's more strategic business objectives and implementing specific practices and technology that will support supervisors in their challenging role of motivating and supporting agent teams.

A changing coaching environment
While other contact center management processes have evolved over the last decade, coaching methods and technology have lagged.   Several dynamics are now converging to drive progressive contact center executives to re-examine coaching practices and support technology.

<u>Figure 1</u>
Key Trends That Impact Coaching Methods

- *Advent of Customer Experience Management*
- *Changing role of the contact center*
- *Growing product and service complexity*
- *Multi-channel communications*
- *Agent as King or Queen*

Advent of "Customer Experience Management"
Customer Experience Management (CEM) has emerged as a new paradigm for modeling the agent-caller interaction. An important distinction between CEM and traditional customer service is the notion that every interaction at any touch point constitutes a customer experience. The sum total of these experiences influences the customer's view of the brand and the company. These experiences can be positive or negative. The resulting predisposition to favor or disfavor the brand has important economic consequences. Customers that have negative views will choose other brands, if that option is available. If they cannot readily switch brands (because of barriers) these supposedly "loyal" customers may share their feelings with others – a likelihood made much easier with Internet blogs – and thereby dissuade potential new customers and diminish investments made in communicating the brand promise. On the other hand, customers that are delighted with their interaction are likely to remain customers and to share their positive experiences with others.

Changing Role of the Contact Center
The evolving role of the contact center is compelling contact center managers to rethink the way they measure and evaluate agent and group performance. Today contact centers are expected to achieve goals that were not part of the performance plan even five years ago. Examples are:

Key Goals of the
Contact Center

- *Increasing revenues*
- *Growing customer satisfaction*
- *Retaining customers*
- *Supplying market intelligence*

At the same time, contact centers are still expected to operate at peak efficiency and keep operating costs down.

Growing product and service complexity
Products and services today are highly complex. Consider the ubiquitous cell phone. About a decade ago it wasn't that hard to be a customer service representative (CSR) for a wireless carrier. Providers may have had a half dozen phones and three to four plans to offer customers. The phones all did basically the same thing - they let you place and receive wireless calls. Some flipped open and some were "thin as a razor." Now there are over a hundred phones to choose from. You can use them to surf the Internet, read emails, send text messages, take photos, and make movies. You can even place and receive calls! And it seems there is a special plan for everyone.   Simply keeping up with all the changes in the product offering is a steep challenge for supervisors and agents. As the complexity of a company's product increases, there is an impact on the quality of customer care. The CSR has to understand the many combinations and permutations of offerings and help guide the customer to the solution that is best for them. The result is greater demand on supervisors to keep the contact center staff up-to-date on frequent changes and coaching them on how to quickly come to a mutually beneficial decision. .

Multi-Channel Communications
Consumers have many choices in how they communicate with contact centers. Telephone is still the preferred channel, followed by email, Web chat, fax, and postal mail. Automated Web and voice self-service are popular for basic query/response interactions, but when the question is complex (at least to the caller), people prefer to speak with a customer service representative. Looking to the future, contact center professionals expect the most rapid growth to occur with instant messaging and text messaging because of the worldwide proliferation of wireless communications devices.

Agent as King or Queen

As management demands more of contact center agents, the value of an experienced and capable agent increases. Turnover is costly in terms of recruitment and training, but the greatest cost according to surveys of contact center managers is deterioration in service quality. Studies have shown a strong correlation between agent satisfaction and customer satisfaction.

Impact on the contact center
Contact center management deals with these key trends we just outlined and the multiple and sometimes conflicting missions in many ways. The following discussion outlines some of the most common popular courses of action.

Knowledge management
Keeping up with new products, new services, and new policies and procedures is a continuing challenge. Internal messaging systems and sophisticated elearning tools are helpful. A growing number of contact centers are investing in web-based "knowledge bases" which help ensure that information is accurate, timely, and equally accessible to all. These tools are very helpful in explaining the "what" and the "how," but agents really want to know the "why" which relies upon the communications skills of a supervisor.

Train agents on new skills
The high-performing contact center of today needs to be able to process queries on multiple topics. There is pressure to complete queries on the first contact. From a practical standpoint, this means if a caller changes topics, say from inquiring about a service upgrade to asking about a recent invoice, the agent has to make a seamless segue to the next topic, demonstrating mastery of both subject areas. Similarly, there is a growing need to communicate in different channels. Agents may be highly proficient in voice communications, which allows them to express their personalities, but lack written communication skills used in Web chat or email. If agents cannot learn new skills - or supervisors lack the skills themselves to impart this knowledge, then new people with these skills will have to be hired. A good example is language skills.

Call Blending
With demands to generate revenue while at the same time maintaining service levels for inbound calls, some centers are training service-centric agents to make revenue-generating outbound calls to existing customers during periods of slow inbound traffic. This approach increases productivity from existing staff, but at the risk of higher stress levels. Successful call blending also requires advanced workforce management software to plan the best times for making outbound calls and predictive dialers to ensure that agents maximize their time talking to customers, not dialing telephone numbers.

More coaching
The scope of an agent's role is expanding as the need for problem resolution increases. To deal with the growing complexity and related stress, contact center management often determine that "more coaching" is required. This is a sensible approach. Agents need guidance and encouragement to deal with the changing environment. The problem is that supervisors have limited capacity to provide

the level of personal attention needed for more effective training. *More* coaching does not automatically mean *better* coaching.

Adoption of new metrics
As the responsibilities of call centers evolve to more closely align with corporate goals and strategies, progressive call centers are questioning the value of many traditional metrics. The trend now is to define and construct metrics that are more relevant to the specific goals and capabilities of individual contact centers. Examples of "new" metrics include:

- *Customer lifetime value*
- *Revenue per call*
- *Revenue per agent*
- *Cross-sell attempts*
- *Cost per contact per channel*
- *Conversion rate*
- *Top box customer satisfaction*
- *Top box agent satisfaction*
- *First call resolution*
- *Agent retention*

Greater customer engagement
Customer centricity is all about making memorable customer experiences a focal point for the enterprise. While the commitment should be enterprise-wide – addressing all customer touch points – management looks to the contact center to lead the charge for stronger customer relationships. The payoff comes from greater customer retention, more focused customer care, and the good words delighted customers will liberally share with others.

Where coaching fits in
The coach is the linchpin between strategy and execution, the person who can answer the difficult questions when the agent is stumped or provide encouragement when he or she may be a little down after a difficult interaction. The coach is also the one individual most specifically charged with the development of others. The direct supervisor has a strong impact on agent satisfaction. Studies have shown that agent satisfaction is highly correlated with customer satisfaction.

There is some persuasive evidence that management style and the quality of the work environment have a powerful influence on agent retention. In 2005 Manpower Corporation commissioned the SQM Group to conduct a massive study of 212 contact centers and customers that contacted these centers.

Following are some highlights;

- *For every 1% improvement increase in employee satisfaction there is a 2% improvement increase in customer satisfaction*
- *The top five attributes that drive employee satisfaction in contact centers are (1) feeling appreciated for the work they do, (2) not working in a stressful environment, (3) being valued and respected, (4) advancement opportunities, and (5) effective utilization of the employee's skills and talents.*
- *When asked to rate their satisfaction with certain employer attributes, 41% were very satisfied with the management style of their contact centers but only 24% were very satisfied with the coaching they received.*

The ideal supervisor has the wisdom of Socrates, motivational powers of Vince Lombardi, and empathy of Dr. Phil. Unfortunately, there aren't many people like this. The alternative followed by many contact centers is to select supervisors from the ranks of agents. This is a good thing, as it provides a visible career path for agents. However, there is an implicit assumption that the moment a former CSR is appointed to the position of supervisor those latent leadership qualities will suddenly burst forth for all to see. In fact, the qualities that make an effective manager are very different from the skills and knowledge required to be a top notch agent. New coaches need guidance and mentoring themselves as they grow into their new responsibilities.

Obstacles to more effective coaching
Learning their new role is a special challenge for new coaches but there are other obstacles that limit the effectiveness of coaching.

<center>Figure 2
Coaching Challenges</center>

- *Insufficient time - supervisors have too many other responsibilities*
- *Coaching is reactive - looks to the past, not the future*
- *Current methods assure continuation of the status quo*
- *Lack of metrics for gauging coaching effectiveness*
- ***Few tools – technology has not kept pace with demands***

Insufficient time
Industry experts believe that monitoring and coaching are the most important responsibilities of supervisors and should consume 60%-75% of a supervisor's time. While this may be a laudable goal, evidence indicates that most coaches spend about half that much time working directly with agents.

Coaching is reactive - looks to the past, not the future
Coaching today is tightly linked to quality monitoring. Supervisors determine the focus of their coaching sessions on the basis of call evaluations and direct observation. This process focuses on the past. Coaching can also be used as a valuable tool for preparing agents for the future, such as addressing new management priorities, preparing for new channels of communications and dealing with significant events like acquisitions or new products.

Current methods ensure continuation of the status quo
By necessity, contact center management can only evaluate a very small sample of agent interactions. Even the best performing contact centers rarely score more than five to ten calls per agent each month. That same agent may have handled over a thousand interactions during that period. Recognizing that the call sample will never be statistically representative of actual calls handled, many contact centers choose to sample only "average" calls. Theoretically this is the most equitable approach, but in reality it is the calls that take substantially longer to complete, that may have involved long holding periods, or transfers to other parties, or resulted in a significant positive or negative event - that represent the best opportunities for performance improvement. These are the calls that should

be selected for evaluation. This process will help coaches determine where their coaching efforts should be directed for each agent.

Lack of metrics for gauging coaching effectiveness
Perhaps no other business function in the enterprise is sliced and diced like the contact center. The operation runs on numbers. And to nobody's surprise what gets measured is what gets done. What is surprising is how little data is captured that can tell management the effectiveness of their coaching efforts. Without objective data, it is hard to identify the most effective coaches or determine which tools and practices are most successful and should be adopted as standard processes.

Few tools – technology has not kept pace with demands
While the value of good coaching has never been greater, the technology tools available to supervisors, with a few notable exceptions have not evolved to meet the demands of the modern contact center. The technology focus has been on combining applications into tightly integrated all-in-one workforce optimization suites. Very few vendors even focus on coaching as a contact center process. Envision Telephony, with its rich history with Click2Coach®, a contact center software product, understands the critical role of coaching.

Football and targeted coaching
It's Friday night and two high school rivals, the Bobcats and Owls, are facing-off in a key match-up. The Bobcats have the best talent and are coached by Tom Edwards, a young man just three years out of college. Tom tries to compensate for his lack of experience with unbridled enthusiasm. The Owls have good but not exceptional talent. They have strung together ten consecutive winning seasons, not because of their personnel, but because of their coach. Oscar Gaines has coached high school football for 20 years, and has a different coaching style than his rival Edwards.

At halftime the score is tied 14 to 14. In the locker room Coach Edwards excitedly implores is team to "hit harder," "run faster," and "believe in themselves." The Bobcats join hands, let loose with a loud roar (like a Bobcat would be expected to make when springing upon unsuspecting prey), and rush onto the field jumping wildly and fists pumping in the air.

In the opponent's locker room, Coach Gaines carefully dissects the first half, pointing out weaknesses in the Bobcat's defenses and sketching some plays that can take advantage of coverage lapses and a slow-footed defensive end. He reminds his team that the Bobcat's center had to leave in the second quarter because of an injury and the second string center has a problem with long snaps. Gaines spotted this from hours of reviewing game films. He outlined a play for rushing the punter. He then quickly recapped the halftime review and urged his team to carry out their assignments.

Late in the fourth quarter, with the score still tied and the Bobcats forced to punt from deep in their own territory, Coach Gaines calls the rush play he had diagrammed at halftime. The Bobcat's nervous center bounces the long snap to the punter which provides the one second delay needed to block the punt. The

Owl's right tackle scoops up the ball and dashes into the end zone to make the winning score.

This vignette illustrates the difference between generalized coaching and targeted coaching. The Bobcats had great talent. Their young coach had football knowledge but no prior training as a coach. He did what he thought coaches were supposed to do - impart some knowledge but mostly motivate the troops! Coach Gaines also motivated his troops, but concentrated more on the details of a winning game plan.

Understanding targeted coaching
The concept of targeted coaching is to focus on the specific skills and knowledge gaps of specific agents. You may ask, "How is this any different from what contact centers are doing now?" Coaching is intended to address skill and knowledge gaps identified in the monitoring and evaluation process. But the crux of the issue is that the process relies on choosing "typical" calls and looking back to past interactions. This approach ignores two important realities. First, the interactions sampled can never be truly indicative of actual agent performance because of the small sample size. Second, the contact center is a highly dynamic environment. Agents are in the "center of the storm." When the company makes strategic or tactical changes, like opening new locations, raising fees, undertaking major promotions, or laying off employees, the contact center is the first point of defense. Events such as these are almost always known in advance. Targeted coaching would enable supervisors to alert agents and prepare them with the proper responses. In this sense, coaching is pro-active, not re-active.

<u>Figure 3</u>
Attributes of Targeted Coaching

- *Individualized - tailored to the skill and knowledge gaps of each agent*
- *Responsive to changing priorities*
- *Proactive – anticipates future developments and prepares agents in advance*
- *Based on timely and relevant content*

Putting targeted coaching into practice
Targeted coaching should be a disciplined process, with internal consensus on coaching objectives, methods, measurement, and resources. The first step is to define the objectives, both strategic and tactical. At a high level, coaching and everything else that goes on in the contact center should be directed at improving the quality of customer care. To maximize coaching and increase its contribution to customer satisfaction, management needs to understand what underlying forces drive interaction quality. While there will be differences among contact centers, there is enough research on this topic to identify the following important quality metrics that drive customer satisfaction.

- *Speed of response*
- *Accuracy of information provided*
- *Problem resolution upon initial contact*
- *Courtesy and clarity of agent*
- *Agent satisfaction*

Other factors may drive perceived call quality and customer satisfaction in your organization. There are tools today for economically gathering customer feedback then analyzing the data to determine the relative importance of different factors in forming attitudes. Contact centers that do not have automated survey and speech analytics applications can develop "Top 10" lists simply by polling agents and supervisors.

Once the list of customer satisfaction drivers is developed, ratings forms should be designed to rate performance on these attributes. For example, if you find that repeat calls from the same individual on the same topic are exceeding acceptable norms, then you need to target repeat calls during the call monitoring process. By analyzing and rating these calls, you will identify the root causes of unacceptable first call resolution. This may reveal agent confusion over a particular policy or perhaps the rules of a new promotion. Armed with this knowledge, supervisors may research the promotion with the marketing department, then prepare FAQ's which can be distributed to all agents and discussed in more detail with agents that need more help. Contact center management may also decide to prepare a list of subject matter experts who are willing to assist agents on the subject of promotions. The contact center director may take a personal action item to engage more frequently with the marketing department to find out what promotions are scheduled and ensure the details are provided in advance of the promotion kick-off. With this approach, coaching is now targeted to a specific causal event.

The key to resolving this specific issue is a result of selecting calls for evaluation that exhibited characteristics of a repeat call. As more targeted coaching materials are developed, these may be added to a searchable coaching resource library where supervisors can locate materials based on topic.

Targeted coaching is also effective for teaching new skills. Two common examples today are non-voice communications and revenue generation. There are many good course materials for training sessions, but agents often need help in real time. We tend to retain information we learn while in the process of solving a real problem. It's the difference between learning a new software application by reading the manual, or having someone stand over your shoulder showing you what to do.

Calibration sessions are routine in high-performing contact centers. During these sessions supervisors listen to a sample of recorded calls and individually rate them. Then they jointly discuss the reasons for their ratings. The aim is to narrow the deviation in agent ratings of subjective qualities like courtesy, call control, and problem solving skills. Calibration sessions can also be helpful for coaches. At these meetings supervisors can exchange ideas about coaching techniques that work and don't work.

Metrics for coaching are a special challenge. Contact center managers understand the truth in the old adage that what gets measured gets managed. Centers need to develop metrics that gauge coaching effectiveness. There are no legacy key performance indicators, like "average coaching minutes per agent per

day." Quizzes are a useful tool. With some recording systems you can follow up coaching sessions with quick quizzes to learn how well the coaching information was understood and retained. Another method is to watch key performance trends and evaluation scores to see if there has been any improvement after training sessions. Management should also consider gathering feedback directly from agents, in terms of surveys or informal "walking around" conversations. The intent is to gauge effectiveness, not process.

Timing is critical. Coaching should occur right after a "coachable event." This way the supervisor's guidance will be immediately relevant and the learning is most likely to be retained. Do not wait until the end of the month then try to "catch up" with the quota of evaluations and coaching sessions.

Finally, it is very important to enlist the support of agents. This can be done by first agreeing on what skill and knowledge gaps need to be addressed. Going back to our example of improving first call resolution, the supervisor might begin by explaining how important this metric is to customer satisfaction and how knowing the answers will improve the agent's job satisfaction. The coach may also ask the agent what help he or she needs in resolving queries. This feedback along with archived voice and screen captures will provide the basis for a highly targeted coaching session.

Figure 4 recaps some sound practices for implementing a targeted coaching program

<u>Figure 4</u>
Implementing a Targeted Coaching Program

- ***Identify the key drivers that help achieve or hinder accomplishment of these objectives.***
- *Establish metrics for establishing targets, current performance and trends with these drivers.*
- *Adjust the evaluation form to include these "metrics that matter."*
- *Use quality monitoring to capture voice and screen actions that exemplify deviations from the desired norm.*
- *Time coaching to coincide as closely as possible with coachable events.*
- *Use coaching sessions to underline why these metrics are important.*
- *Collaboratively work with the agent to develop an action plan to improve performance.*
- *Create coaching aids for each performance objective.*
- *Conduct calibration sessions with other supervisors to share ideas and develop a consistent approach to dealing with common agent performance problems.*
- *Implement metrics to help gauge coaching effectiveness.*
- ***At all times solicit feedback from agents.***

Technology for targeted coaching
Today contact center management is being asked to do more with the same (or even less) people.   The robot coach has yet to be invented so you will have to

rely on solutions available today. The essential applications are quality monitoring, speech analytics, and e-learning. None of this is new but the problem is that most vendors have designed and priced their software for the traditional model of coaching, not targeted coaching. The contact center then has to find "workarounds" to apply legacy software to the new vision for coaching. The software needs to function harmoniously for the specific purpose of strengthening the coaching effort. It's all about making it easy for supervisors.

<u>Figure 5</u>
Technology Requirements for Targeted Coaching

> - *Easy select calls for QM evaluation*
> - *Integrated with speech analytics*
> - *Flexible evaluation templates*
> - *elearning tools*
> - *Automated delivery*

Easy to select calls for QM evaluation
Supervisors should be able to quickly sort through agent calls, then bucket calls, based on specified criteria. From this subset the supervisor selects calls for monitoring and evaluation. For example, if the current priority is to reduce handle time, supervisors should be able to request calls and screens from specific agents that exceeded threshold time periods.

Integrated with speech analytics
It was not long ago when speech analytics was considered a costly frill suitable only for the largest contact centers with the most lavish budgets. That is no longer the case. Speech analytics is essential for effective monitoring and coaching and is now surprisingly affordable.

Consider that the priority is not on handle time, but customer retention. In some businesses, particularly those that are subscription based, the value of retaining a disgruntled customer can far exceed any short-term savings in cutting the call short to meet Average Handle Time (AHT) objectives. If the mission is to stop or slow customer defections, than coaches need to monitor and evaluate interactions in which the agent had to dissuade a loyal customer from switching to a competitor. This requires sorting calls by topic of discussion, a task that can only be done through speech analytics.

Flexible evaluation templates
Supervisors and QA specialists need to be able to quickly and easily revise the evaluation forms to reflect changing goals and priorities.

elearning tools
Training and coaching aids may consist of computer-based training, presentations and custom and third-party training directly to agents, along with coaching tools such as customer interactions and evaluations from quality monitoring sessions. On-screen notifications can let agents know when new call center training arrives.

Built-in video authoring tools allow management to prepare highly targeted and professional learning modules. Agents can be notified quickly and consistently of new products, price changes, promotions, contests, awards, and other information they need to stay two steps ahead of callers.

Automated delivery
Delivery of coaching aids must be timed such that it does not interrupt busy call handling times. In some systems delivery can be managed through the workforce management software or through the automatic call distributor. In both cases the object is to present the video clips when agents have idle time.

Executive Summary
Agent coaching remains the most important responsibility of contact center supervisors. In this paper we have noted that several important trends and the expansion of the contact center mission are causing progressive contact centers to re-think their approach to coaching strategy and methods. The most significant of these is to consider the view that blanket approaches are no longer effective in today's world of growing complexity and heightened demands for customer satisfaction and revenue generation. Approaching the coaching process as a highly targeted activity shifts the focus to addressing the highly specific requirements of individual agents. The targeted approach means examining the outliers in the quality monitoring process rather than norms, then using modern and affordable tools like speech analytics to hone in the precise determinants of customer delight and performance efficiency. The Click2Coach suite from Envision, Inc. provides management with the technology tools to implement the targeted coaching philosophy and free-up scarce supervisor time so more time agents can be helped through productive one-on-one coaching sessions.

About the Author

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About Envision

Envision is a pioneer in delivering innovative team coaching and performance improvement products and services to the contact center. Envision's landmark and industry-renowned Click2Coach® fully integrates the value of quality monitoring and management, e-learning, automated coaching and robust analytics and performance management capabilities. Envision marries the power of Click2Coach and Envision Workforce Management™ together on the award-winning Envision Centricity® Web-based workforce optimization (WFO) technology platform to deliver a full spectrum of ROI-driven efficiency and effectiveness gains that meet the most specific and unique objectives of customer-focused organizations worldwide. A commitment to unparalleled customer-centricity is at the center of the company's mission and is what makes Envision the authority on delivering an uncompromising customer experience. Visit http://www.envisioninc.com/, email info@envisioninc.com or call 206.225.0800 ext. 500 for more information.