



WHITEPAPER



The Art of Coaching in the Contact Center

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VITAL PROCESSES

There exists a vital process in contact centers today, as important as workforce management, quality monitoring, and call routing, which many leading operations use to manage their people. This critical process is coaching.

Agents need feedback and goals to improve and succeed, and it is the supervisor's role as a coach to manage and deliver that performance guidance. Unfortunately, in many contact centers today, coaching is not managed with strategy and rigor or treated as a first-class process. Often, the supervisor-agent relationship is broken or mismanaged, jeopardizing the success of the organization as a whole. Yet, if the time and energy is spent to effectively implement a deliberate and controlled coaching process, it can be a lever for significant change.

While coaching practices and purposes vary widely across operations environments and industries, a new generation of coaching has emerged, radically distinct from previous incarnations. The old guard of coaching was characterized by an intuitive approach. Supervisors and agents met at required intervals, but often lacked guidance on specific performance improvement targets. Usually, the process was purely procedural and typically misguided. New coaching, or Performance Coaching, on the other hand, is tuned, empowered, accountable, and tied in directly to overarching company goals — ensuring positive returns on organizational strategy. This approach presents an organization and its employees with actionable plans that are measured, managed, and bottom-up. More specifically, these new methods provide supervisors, managers, and directors with the tools they need to know: *who, when, how often, and what manner to coach.*

Performance Coaching takes a holistic view of the organization to help an operation execute by aligning individual employee goals with strategic company objectives.

Why invest in making coaching a first-class process? As a key element in performance management, coaching in contact centers has implications beyond just the professional development and training of agents—it ultimately leads to significant gains in customer satisfaction, revenue, and productivity. So what's missing from today's common coaching processes?

PERFORMANCE COACHING

Performance Coaching is a mixture of systems, content delivery, compliance and measurement. More specifically, Performance Coaching is the practice of using systematic, cadenced coaching sessions and plans based on data that is personalized and tailored to the individual. Ultimately a coaching initiative finds its greatest success through continuous performance measurement and compliance with coaching best practices. During the coaching sessions, a supervisor gives an employee information and ideas for behavior improvement. Afterwards, the supervisor monitors the employee’s subsequent progress against the agreed-upon goals.

Performance Coaching occurs in various forms, such as a coordinated set of one-on-one sessions, remote and side-by-side call monitoring, team meetings, ad hoc hall conversations, and can involve a direct supervisor or subject matter/skill expert. Performance Coaching is also upheld by coaching applications which support supervisors with data on performance, historical coaching logs, and a clear set of best practices that help supervisors develop their team. Combining all of these elements, Performance Coaching is fact-based and far more personal than prior methods.

Going a step further, Performance Coaching helps an organization achieve its strategic goals by establishing a set of standardized performance targets against which all agents are measured. Using these target metrics, supervisors can not only recognize both stars and poor performers, but can also better determine how to elevate the capabilities of mid-performers. According to football coach legend Vince Lombardi, “coaches who can outline plays on a black board are a dime a dozen. The ones who win get inside their players’ heads and motivate.” In essence, Performance Coaching takes a holistic view of the organization—both its financial and strategic goals, as well as the individual abilities of its personnel—to help an operation execute by aligning individual employee goals with strategic company objectives.

Design

Old Coaching	New Coaching
Casual – Un-focused, procedural routine without concrete takeaways	Responsible/Accountable – Each agent and supervisor is held accountable to a set of specific, individual performance goals and action plans
One-dimensional – Static metrics limit a supervisor’s view into an agent’s true performance	Designed – A multi-dimensional overview of an individual’s entire performance with drill-down capabilities on key performance metrics
Ineffective – Agents often lack direction and specific action items on improvement opportunities	Empowered – Arming agents with the knowledge and tools they need to understand and improve their own performance, allowing them to self-correct
Inconsistent Delivery – With limited coaching activity tracking, management cannot often determine key activities at the Supervisor level, resulting in inconsistent coaching across teams and sites	Measured/Managed – Comprehensive coaching activity tracking allows management to establish and enforce coaching best practices
Transactional – Isolated instances of coaching that attempt to tackle smaller unrelated performance issues	Integrated – Using a combination of reports, dashboards, and workflows along with targeted development sessions, performance issues are dealt with using comprehensive coaching tactics
Time Consuming – Supervisors are often bogged down with administrative tasks, leaving little time for true coaching opportunities	Time Saving – Immediate access to individual agent performance information, including past coaching session notes, provides supervisors with significantly more coaching time

STANDARD COACHING IMPEDIMENTS

Unfortunately, contact centers have been slow to adopt these institutional changes, and today, coaching is still largely one of the most misunderstood, underestimated, and overlooked processes. While most contact centers utilize at least some version of coaching, operations are generally missing key aspects of the Performance Coaching process.

Process

Old Coaching	New Coaching
No Coaching Trail – Paper based records or spreadsheet based files limit supervisor follow-up and accountability	Formatted Documentation – All coaching sessions are automatically stored online in a central location for viewing by current and future supervisors, increasing coaching effectiveness and accountability
Compartmentalized Data View – Individual metrics shown in isolation limited peer comparisons and accurate ranking	Holistic Data View – Ability to see agent performance from a big picture perspective with dashboards, in addition to viewing performance on certain metrics with the drill-down option
No Alerts – No notification to inform supervisors of individual performance and prompt specific action	Integrated Workflow – Supervisors and Agent level workflows prompt immediate action – rewarding key accomplishments and addressing opportunities – resulting in more consistent and effective coaching across teams and sites

Common coaching practices today often lack focus on facts, goals, and actionable data. Coaching sessions take on the form of superficial status updates, rather than development consultations. Operations also typically do not give supervisors the information necessary to tailor their coaching approach to meet an individual’s needs, thereby reducing the effectiveness of ongoing coaching activities. Finally, operations often overlook the importance of tracking follow-up action items and documenting concrete action plans that are agreed upon by both the supervisor and agent. This gives management little insight into what is actually happening on the floor.

Information gathered from the *Merced Systems Coaching Best Practices and Benchmarking Study* indicates that only 25% of participants believed coaches spend their coaching time on the employees that have the most potential to improve. Additionally, only 34% of respondents agreed or strongly agreed that their organization quantitatively tracks the effectiveness of coaching, including agent performance before and after coaching sessions. Finally only 35% agreed or strongly agreed that the organization qualitatively tracks the effectiveness of coaches.

Common coaching practices today often lack focus on facts, goals, and actionable data.

More than just logistical and institutional obstacles, effective coaching is a difficult, hard-learned skill that many operations neglect when promoting employees. Managerial ability is not learned or developed overnight when an employee is promoted from agent to supervisor. Typically in contact center operations today, supervisors develop their management skills on-the-job, with little formal training or ongoing active management. In this way, coaching for coaches as well as supplying the proper tools to help coaches manage their teams, can be one of the most important ways to improve operational performance.

PERFORMANCE COACHING: WHO, WHAT, WHEN AND HOW

Who to Coach

New coaching gives management visibility into an agent's entire performance. With the ability to easily and effectively determine growth opportunities for specific groups of agents, supervisors are then equipped with a variety of coaching techniques to accommodate individuals' needs.

For example, if agent performance were mapped out visually, a bell curve would appear with roughly one-half of the agent population performing at or above average, and the second half performing at or below average. The *Merced Systems Coaching Best Practices and Benchmarking Study* found that supervisors were spending a disproportionate amount of coaching time with the small population of best and worst performers, rather than with the largest population – the mid-performers who can often have the greatest potential for improvement. New coaching promotes a focused approach to elevating agent performance in the contact center, and as a result, the performance of a previously overlooked population – like the mid-performers – can be effectively and efficiently improved through individualized, targeted coaching, ensuring the greatest impact on both individual and total operational performance.

	% Population	% Coaching Time	Difference
Top Performers	20	30	+10
Mid Performers	65	30	-35
Bottom Performers	15	40	+35

Figure 1. Population Being Coached

What to Coach

After gaining a clear understanding of who needs to be coached, with the help of highly personalized reports and dashboards, the next step in effective Performance Coaching involves taking a step back from the numbers, and balancing the desired outcome with the particular behaviors of an agent. As a result, coaching becomes a tailored process that meets the specific needs of employees while driving them towards a clear set of performance standards.

Based on the needs of the individual, coaches can determine which coaching delivery methods—one-on-one sessions, development plans, periodic performance appraisals, rewards and recognition, personal goals, training and skill development, etc.—will provide maximum impact and result in a concrete course of action. Additionally, with easy access to the most granular data, supervisors tailor each session to address an individual's strengths and opportunities.

Whereas old coaching methods take a surface view of performance metrics to give an employee a thumbs-up or thumbs-down performance review, new coaching delivers performance feedback in historical context. For instance, during a supervisor-agent coaching session, a supervisor should have access to a historical view of the agent’s performance on key metrics, along with past action plans, and performance against those benchmarks. Putting an agent’s current performance in the context of past performance and previous development activities helps both supervisor and agent to understand in which areas improvements have occurred as well as where progress still needs to be made. This allows supervisors to deliver the correct content, and equally as important, to tailor the method of delivery to maximize impact.

Call To Action

<p>1. Identify current state – Identify and document current coaching practices (i.e. do you coach to “numbers” or “behaviors”)</p>
<p>2. Eliminate “one-size-fits-all” coaching – Commit to changing coaching culture in your organization and embed best coaching practices with tools and resources for coaches</p>
<p>3. Establish a clear set of performance standards – Identify key metrics to evaluate agent performances across the organization</p>
<p>4. Commit to a phased implementation – Match pace of change with the organization’s capabilities/resources</p>
<p>5. Establish interim goals – Commit to steady, measurable progress</p>
<p>6. Standardize the recognition process</p>

When to Coach

Next supervisors need to understand how often and when to coach each agent. Most importantly, supervisors must have the ability to customize the frequency and length of coaching sessions based on an individual’s specific needs. To do this, leading organizations rely on automated tools, ensuring supervisor accountability in maintaining a consistent and relevant coaching rhythm.

The Merced Systems Coaching Best Practices and Benchmarking Study found that the more time an operation invested in coaching agents per month, the more likely the operation was to report performance at, above, or significantly above goal for revenue, customer satisfaction, productivity and quality. (See Figure 2) In addition, respondents who indicated higher than average hours per month spent coaching each individual agent were also more likely to report attrition lower than goal. While coaching is inherently people-time intensive, an organization must understand what the upside is in spending additional hours coaching, and have a plan against which individual progress can be tracked in order to effectively prioritize the coaching process.

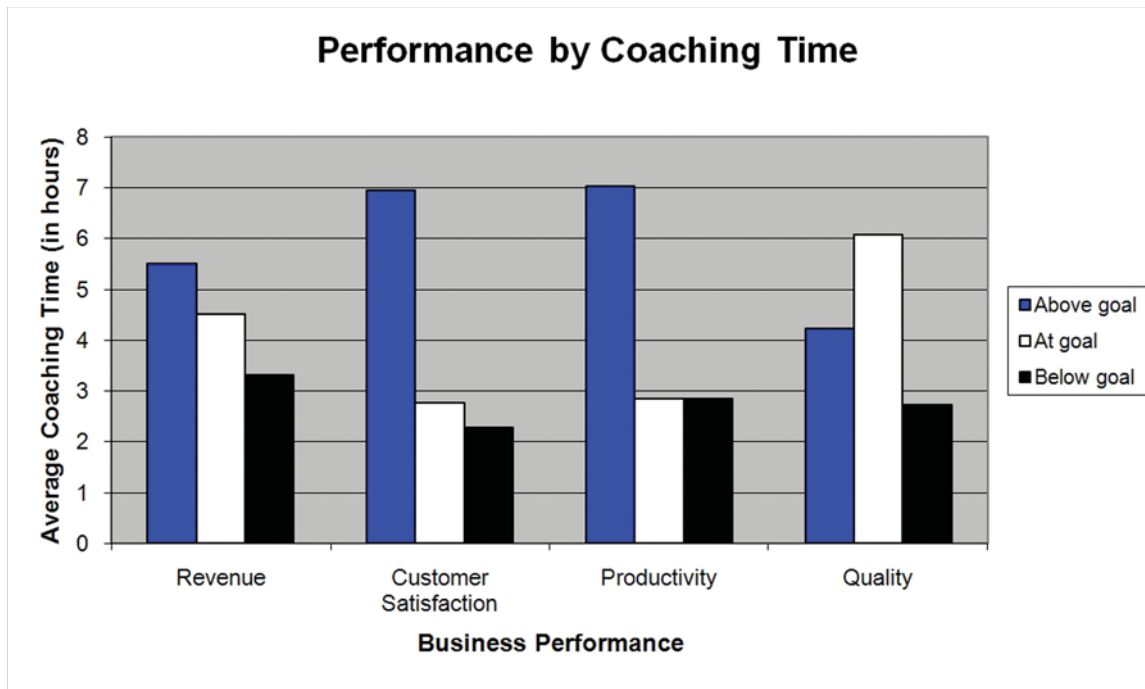


Figure 2. Operational Performance by Coaching Time

How to Coach

Finally, with a consistent follow-up strategy to evaluate the entire process—measuring both agent performance improvement and a coach’s individual effectiveness—an operation can assess the impact of coaching and identify key activities to continuously improve their practices. By employing a comprehensive, multi-level process, organizations can define, control and achieve their strategic performance targets through more consistent and effective coaching across the entire operation.

NEXT STEPS

It is clear that coaching practices in call centers today come in many forms, but it is the organizations with standardized and institutionalized coaching processes and tools that are able to elevate both individual and operational performance. Yet even with a set of synchronized tools and practices, operational success in the long run requires commitment across all levels of the organization—coach and agent compliance with standard coaching practices, clockwork regularity of coaching sessions, and the ability to accurately measure progress and effectiveness.

CONCLUSION

Performance Coaching should be used and regarded as a continuous cycle of calibrating performance to reach short- and long-term process and execution improvement goals. Both the immediate and enduring impact effective coaching has on an operation can be recognized. All that remains is an individual organization’s initiative to take the next step.

Whether the call to action requires re-organization of resources and responsibilities, or instating a new position, like ‘Chief Performance Officer,’ the lever of behavioral change and operational success is waiting to be pulled.

CASE STUDY: DIGITAL MEDIA PROVIDER

This leading digital media company invested in coaching, training and development to support a broader career pathing program. Through Merced Performance Suite's automated coaching forms, supervisors were able to set specific performance objectives and milestone dates for individual agents. Performance thresholds were linked to career growth opportunities and used to promote specific behavioral action. Additionally, management used these thresholds not only as a means of monitoring and tracking agent and supervisor progress and performance, but also as a way of aligning individual agent goals with strategic company objectives.

The end result for this company was the retention of the best performing agents – specifically, an 11% improvement on agent attrition in the first year alone, improved coaching efficiency and effectiveness, and an increase in customer satisfaction.

CASE STUDY: LEADING HEALTHCARE PROVIDER

This company decided to launch an employee-in-need program that targeted specific employees for individual improvement plans. Based on an agent's own particular strengths and opportunities, the program provided agents with both interim and long-term performance goals, along with increased frequency of coaching to meet their specific needs. Unlike most operations that focus more time on top and bottom performers, this leading healthcare provider targeted their often overlooked mid-performing agent population, for improvement.

With a structured process in place to manage supervisor compliance, track agent progress toward both interim and long-term goals, and determine the rhythm and frequency of coaching, this company experienced immediate results that continue to this day. Individuals in the employee-in-need program reduced their average handle time by 5.3%, and 48% of the targeted population met their performance targets, graduating to the next level in less than 7 weeks. Additionally, supervisors dramatically increased their compliance with coaching time, frequency, and follow-up, surging from 49% to 84% during the initial 7 weeks.

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