

# **Customer Care Center Facilitator Guide**

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## **Management Training: Agent Coaching**

***Supervisors will learn a powerful technique for improving agent performance: the Continue / Start / Stop model of coaching – which is designed not only to make coaching a quick, easy, and positive experience for them AND the agent, but through frequent and effective agent coaching, they improve the customer experience.***

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## Facilitator Guide – Agent Coaching

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Each lesson portrayed in these materials contains screen captures from the actual classroom slides. The slides are shown here in the same order as presented in the classroom slides.

## Presentation Icon Legend

Icon	Description
	<b>Exercise</b> identifies when activities take place during the delivery.
	<b>Facilitated Discussion</b> identifies when discussions led by the facilitator take place during the training.
	<b>Call</b> identifies a call that should be played for the agents.
	<b>Handout</b> identifies materials for the participant to reference for additional or specific information.
	<b>Review</b> identifies when the facilitator should review important points that were covered during the training.
	<b>Present</b> identifies when the PowerPoint should be used to show additional information not in the facilitator guide.
	<b>Click</b> identifies click-based animation. Look for the icon in the narrative to know when to advance to the next piece of information.
	<b>eLearn</b> identifies blended learning opportunities where participants will engage with an interactive eLearning component instead of facilitator presentation for learning content.

**Facilitator Hint:** View the presentation in Full Screen Mode by selecting the Slide Show tab on the ribbon, then selecting the From Beginning tool in the Start Slide Show group.

## Management Training: Agent Coaching

**Purpose:** This facilitator guide is designed to be used in conjunction with the facilitator materials listed below in a classroom environment. The terminal learning objective for the module is for learners to apply *the Continue, Start, and Stop model of coaching* after observing agent performance.

**Participants:** Customer care center supervisors

**Lesson Time:** 4 hours

**Prerequisites:** The following lessons should be taken prior to this lesson:

- Module 1: Introduction
- Module 2: Supervisor Roles
- Module 3: Time Allocation

Facilitator Materials	Participant Materials
<ul style="list-style-type: none"> <li>■ Laptop</li> <li>■ Projector, screen</li> <li>■ Flip chart – prepared with the title:               <ul style="list-style-type: none"> <li>□ N/A</li> </ul> </li> <li>■ Socractive.com – prepared with key questions:               <ul style="list-style-type: none"> <li>□ N/A</li> </ul> </li> <li>■ Post-it easel sheets</li> <li>■ Facilitator guide</li> <li>■ Facilitator activity guide</li> <li>■ PowerPoint presentations:               <ul style="list-style-type: none"> <li>□ N/A</li> </ul> </li> <li>■ Computer Based Training Modules:               <ul style="list-style-type: none"> <li>□ <i>Supervisor eLearning Aid</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Pen or pencil</li> <li>■ Supervisor eLearning aid</li> <li>■ Handouts:               <ul style="list-style-type: none"> <li>□ Participant guide</li> </ul> </li> </ul>

Agent Coaching	
Time	Task
2:30 – 2:45 p.m.	Break
2:45 – 3:10 p.m.	Introduction
3:10 – 3:15 p.m.	Overview and Objectives
3:15 – 3:30 p.m.	What Is Coaching?
3:30 – 4:00 p.m.	Ask questions, administer end-of-day survey
<b>Day 2</b>	
8:00 – 8:15 a.m.	Review Day 1 and ask questions
8:15-9:00 a.m.	The Coaching Formula
9:00 – 9:15 a.m.	How Do I Coach Employees
9:15 – 9:45 a.m.	Coaching Employees
9:45 – 10:00 a.m.	Summary
10:00 – 10:15 a.m.	Break
<b>Total Time:</b>	2.5 hours

## 1. Introduction – 25 minutes

**Facilitator Hint:** Explain that the second part of this module will begin on Day 2. When it comes to quitting time at the end of this module, be sure to remind participants *what was covered today* and *what will be covered tomorrow*.



### Say:

We've covered a lot of ground already in this course about what your role is all about. Now we are going to begin focusing on how to carry your role out through agent coaching.

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### Facilitator Note:

Ask the following questions and randomly call on participants to briefly share their experience. Keep this question and answer activity to no more than 10 minutes.

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### Ask:

- Who has ever had a *negative coaching experience*? Were you the recipient of the coaching, or were you the one who provided the coaching?
- What was that experience like for you?

## 1. Introduction – 25 minutes

### Say:

In this module, you are going to learn a powerful technique for improving your agents' performance. *By doing so, you will learn how to directly influence the customer experience – which is of paramount importance in this business!* Remember, **you are a call center professional first** – who happens to work for the client – and NOT the other way around. If you take nothing else away from this course, take that message.

- The end goal of agent coaching is *inspiring and motivating them to provide a world class customer experience one customer and one call at a time.*
- Agent coaching is not about criticizing or belittling but about having purposeful conversations that lead to an improved customer experience. Agents who feel great about their ability to help customers have confidence, and that in itself is motivating.

### Say:

As we already covered, the realities of your role as a care center supervisor sometimes get in the way of coaching agents. But, coaching agents is the wrong thing to let slide – it is, in many ways, the single most important activity in your job.

Given all the other tasks a supervisor is expected to perform, let's figure out how to prioritize coaching.



### Ask:

What prevents you from spending the time necessary to effectively coach agents?

## 1. Introduction – 25 minutes

### Answers:

- “There’s no time for coaching.”
- “I don’t know how.”
- “It feels confrontational.”
- “I’m afraid of sparking a grievance.”

### Say:

This module is designed to make coaching agents a quick, easy, *and positive experience* for you *and* the agent.

### Say:

Before getting into what coaching is, let’s clarify what it isn’t.

Coaching is not the same as *corrective action*. While coaching will often lead to new behaviors that yield better outcomes, corrective action is a formal process used by the company and spelled out in the Collective Bargaining Agreement. We’ll get into more detail on that topic on Day 4 of the course.

In the context of your role as a supervisor, coaching occurs in two ways:

- In planned meetings (i.e., one-on-ones) with individual agents – with the purpose of reviewing QA feedback.
- In real-time (in-the-moment or on-the-spot) coaching as you walk the floor – to praise or make helpful suggestions as opportunities arise. This is why *walking the floor* – rather than sitting in the chair up front – is expected.

And, in the context of your role as a supervisor, coaching occurs for two reasons:

- To reinforce desired behavior.
- To modify undesired behavior.



## **1. Introduction – 25 minutes**

### **Facilitator Notes**

## 2. Overview and Objectives– Coaching Topics – 5 minutes

### Say:

Today we are going to answer several questions about coaching, and show you how it actually makes your job EASIER. These are the questions we'll explore today:

- What is coaching?
- How do I coach agents in a positive and efficient way?

### Ask [rhetorical query; no discussion necessary]:

How would you answer these questions – based on your past training and experience?

### Say:

By answering the questions and learning to apply the concepts to your job, we will accomplish several objectives with this lesson. Let's review them now.

### Say:

By the end of this lesson, you should be able to do the following:

- Apply the six step coaching formula after observing agent performance
- Apply the Continue, Start, and Stop model of coaching



### Ask:

How will achieving these 4 objectives help you in your role?

### Say:

Part of our change management approach is to help you not only apply an easy-to-use coaching formula, but also to help you improve your team's QA by **NOT** focusing on the score, but the behaviors that impact the customer experience.

## 2. Overview and Objectives– Coaching Topics – 5 minutes

### Say:

There are two main skills that are required to be a coach:

- Listening
- Asking questions



### Ask:

- Why are these two skills critical to your being an effective coach?
- How much time do you currently spend coaching each day?
- How much time are you expected to spend coaching each day?

### Answer:

75% of your day should be spent coaching – on the floor and in scheduled meetings with agents. That equates to six hours of your day – as we learned on Day One.

### Ask:

Who remembers the two main reasons for coaching?

### Answers:

- To reinforce desired behavior, and
- To modify undesired behavior.

This is key because, remember, *your goal as a Customer Care Center Supervisor is **a positive customer experience***. You get to that by *effectively coaching your agents*.

## Facilitator Notes

### 3. What Is Coaching? – 15 minutes

**Facilitator Hint:** The following videos are accessed via the eLearning aid..



#### How to Get Good Work Repeated

Play the following video via the eLearning aid. Then allow a few minutes to ask the ensuing questions for learners to discuss what the benefit of coaching will have on them, the agent, their team, their site, and customers.



<https://www.youtube.com/watch?v=KGHlgEhmk4>

**Say:**

Let's watch a video that will help you answer part of the question of what coaching is.



**Ask:**

- What did you observe in this video?
- What are your takeaways?

**Ask:**

What is the other reason you would coach an agent?

**Answer:**

To modify undesired behavior.

**Say:**

Let's watch another brief video that illustrates how that works.



#### Correcting Poor Performance

Explain that this next video helps to explain the concept of *if you see it, say it* – unless what you see is negative, then ONLY provide feedback in private – never in front of others – as it will put the agent on the defensive – and create a poor work environment and lower agent morale.

Show the next video.

### 3. What Is Coaching? – 15 minutes



[https://www.youtube.com/watch?v=O\\_vlekGlt\\_M](https://www.youtube.com/watch?v=O_vlekGlt_M)



#### Ask:

- What did you observe in this video?
- What are your takeaways?

#### Say:

As you observed in both videos, on-the-spot coaching isn't the only time you need to coach your employees. You should also coach employees in a private area, such as a coaching room. This type of a meeting is often referred to as a one-on-one (1:1). You might recall from the Time Allocation activity you need to have a 1:1 with each employee weekly, on top of the on-the-spot coaching opportunities you take with each agent.

#### Ask:

Do you have any questions at this point?

#### Say:

*Ok, the ultimate outcome for this module is for each of you to **improve customer experience** through frequent and effective agent coaching. Let's review an easy-to-use coaching formula.*

### Facilitator Notes

## 4. Coaching Formula – 45 minutes



### Coaching Quick Aid

Remind participants of their pre-course reading assignments – and guide them to the Coaching Quick Aid found in their Participant Guide. Briefly review this quick aid and reinforce the point that participants should continue to reference this resource in their production environment.



### Say:

So, the Agent Coaching Formula is to ask these questions:

1. How do you think the call went?
2. What did you do that worked well on this call?  
How do you know it worked well?
3. What didn't go as well? How do you know it didn't work well?
4. What could you do next time to have the call go better for you and the customer?
5. Here's what the QA and I heard on the call: [insert observations here].
6. Based on what we just discussed, what can you continue and start doing differently to impact you and the customers' experience? Would you please continue/start/stop to [insert request here].



### Ask:

How do you feel about these six steps?

### Say:

The reason for these questions is it sets a positive tone for you and the agent, and these questions focus on *building the agent up* while providing specific *continue and start feedback*.

### Say:

Now let's move onto the last step in the formula: Continue/Start/Stop.

## 4. Coaching Formula – 45 minutes

### Say:

The *Continue, Start, and Stop* approach allows you to put the onus on each agent.

When you ask agents questions such as, “How’s it going?” or “How do you think that call went?”, you might not get much actionable feedback or input from the agent.

But, when you use Continue/Start/Stop, you are more likely to get input that will lead to improvement. The agents will begin to take ownership of their job performance as they come to recognize the answers to three questions:

- What are they doing or can continue doing well?
- What can they start doing or begin doing differently?
- What can the agent stop doing that will help improve the customer experience?

### Ask:

- How might asking these three questions help the agent to reflect on the call mechanics and their own behavior or performance?
- How will asking these questions help the agent to think about customer service as well?
- In what way does *drawing the information from the agent* – instead of telling the agent – create a better learning and coaching environment?
  - **Answer:** It sets the agent up for open, honest, and accurate communication with you, their supervisor.

If the agent missed some things, you can focus on the missing components to help the agent see what they did well – and what could have been done differently.

## 4. Coaching Formula – 45 minutes



### Continue/Start/Stop

Have participants access the eLearning aid to review the Continue, Start, Stop model and some examples.

Demonstrate navigating the interactive element. Allow **approximately 5 - 15 minutes** to review the material.

**Continue** – Employees need and want to know what they should continue doing or what they are doing well in their job roles.

- It's human nature to want some type of recognition. So, your job as a supervisor is to help agents not only discover what they are already doing well, but what they should continue doing.
- Praise your employees for those things they discover with you – as their coach and supervisor – that they do well. Your role as a supervisor is to help employees know what they are doing that positively impacts their performance, the business, and each customer's experience.
- Remember: *We ALL learn best when we are a part of the conversation.* So, rather than always telling them, help your agents *discover* the answers.

Examples; the agent could:

- Continue providing a great customer experience by educating them – through the use of information gathered from Franklin.
- Continue to avoid transferring calls – as *their current transfer rate is the lowest on the team.*
- Continue asking questions to receive guidance that helps resolve customer issues on the first call.



## 4. Coaching Formula – 45 minutes

**Start** – Employees need and want to know what they are not doing to be successful in their job roles.

- Your role as a leader is to facilitate this with your employees. When you help your employees to discover what they are not doing to achieve or meet desired performance expectations, you help set them up for success. Employees are not able to meet performance expectations if they are unaware of what they are not doing that they should be doing. Your job is **not to TELL** your employees what they need to start doing, but rather help them discover it.

Examples; the agent could:

- Start welcoming customers by following the Quality Assurance guidelines within Franklin.
- Start using Franklin to provide complete and accurate information to customers to effectively resolve their issue – to minimize callbacks.
- Start posing questions to their supervisor, team lead, and seasoned agents if there is a lack of understanding.

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**Stop** – Employees need and want to know what they should stop doing in order to be successful in their job roles.

- Your role as a supervisor is to help employees know what they are doing that negatively impacts their performance, the business, and each customer's experience. Your job is **not to TELL** your employees, but rather help them to discover it.

Examples; the agent could:

- Stop transferring customers – to ensure customers received the best customer experience they can receive from them; i.e., *First Call Resolution*.
- Stop putting customers on hold for long periods of time.
- Stop talking to other people without putting customers on hold.

**Facilitator Hint:** This ends the eLearning review.

## 4. Coaching Formula – 45 minutes

### Say:

As you know, coaching helps individuals achieve desired performance.

Your role is to help ensure agents achieve desired performance in key areas such as quality, customer service, adherence, transfers, and average handle using the six-step coaching formula.



### Continue/Start/Stop Knowledge Check

- Have all of the supervisors individually think about the various agents on their team, and then, *without naming any names*, have them select in their mind one agent with whom that they could see conducting a Continue/Start/Stop plan.
- Select 6 – 8 supervisors (as time permits) and, *while reminding them NOT to share the name of the agent they have in mind*, have them each come to the front of the room and write on a flip chart or the whiteboard some specific continue, start, and stop behaviors.
- Remind learners that they are only doing this exercise to see what a realistic continue, start, and stop might look like. In reality, they would ask the questions previously discussed. In practice, the agent would be prompted to self-identify these things – *instead of* the supervisor telling them.

Once finished, review each of the responses and encourage the class to evaluate each continue, start, and stop by identifying the pros and risks of each one. While some participants may feel that this exercise may be difficult without knowing the identity of the agent, stress that the what is being shared are likely good points that may, in time, apply to many members on their team.

### Say:

Now that you know how to coach employees using the Continue/Start/Stop/ model, let's practice this coaching approach.

## Facilitator Notes

## 5. How Do I Coach Employees? – 15 minutes



<https://www.youtube.com/watch?v=OK3toSO1JhE>

### Say:

Let's watch a sample coaching session that fits the Continue/Start/Stop format – and demonstrates how to coach employees.

I want to point out that this use of the model omits the Stop part – because here, the coach's approach is to include the Stop items as part of the Start or "Begin" items.



### Ask:

Based on the video, how did the supervisor coach the employee?

### Answer:

- The supervisor began by asking the employee about the call, what went well and finally what opportunities she had to begin doing on the next call.
- The supervisor also recapped often throughout the coaching session.

### Ask:

Who provided the employee the specific information about her performance?

### Answer:

The employee did. The supervisor simply asked her questions about how the call went. The employee determined what she could work on to meet performance expectations.

## 5. How Do I Coach Employees? – 15 minutes



### Ask:

Which approach is more likely to get the best response from an agent?

1. “Stop transferring calls when you don’t know the answer.”
2. “Did you look for the answer in Franklin before transferring that call? If you didn’t, then you need to.”
3. “You always transfer calls without looking in Franklin first. You need to stop that.”
4. “I noticed you transferred that call pretty quickly...did you remember to check Franklin first? If not, please do so in the future because it makes a big difference to the customer.”

**Facilitator Hint:** Review the overall responses with the class. Identify the correct answer – which is #4.



### Ask:

Why is #4 is the correct answer?



### Coaching Practice Prep

Explain participants will now get an opportunity to practice the coaching process.

Show the following slide as a visual for supervisors to see how they change up roles for each round..

	Participants		
Round 1	A	B	C
Round 2	C	A	B
Round 3	B	C	A

## Facilitator Notes

## 6. Coaching Employees: Practice – 30 minutes



### Role-Play Activity: Three Step Formula

#### Instructions:

- Note: There are three recorded calls included for this activity. The calls are located in the eLearning aid labeled as Coaching Employees Practice 1, 2, 3, respectively.



- Divide participants into groups of three. Each group will use the Continue/Start/Stop worksheet while playing the role of supervisor, agent, and observer.
- Each participant will take turns playing the three roles: A-Supervisor, B-Agent, and C-Observer.
- Take a few minutes to review the worksheet with the class. Explain that participants will all listen to the same call (there are three of them as this activity will be completed three times). The person playing the role of an agent will pretend the call the class listened to was their call.
- One key aspect of this practice activity is that each observer will complete a continue, start, stop plan for the person playing the role of the supervisor. This is to aid in the practice as well as help develop and improve the coaching skills.

#### Supervisor Role

- Complete the Continue/Start/Stop worksheet by asking the agent specific questions about the call (remember the video).

#### Agent Role

- Observe the recorded call with your supervisor.
- Complete the Continue/Start/Stop worksheet by answering specific questions about the call.
- Ensure you pay attention so that you can speak to legitimate opportunities you can Continue/Start/Stop.

#### Observer role (aka Operations Manager)

- Complete a Continue/Start/Stop coaching session for the supervisor on how the supervisor coached the agent. Then, deliver the feedback following the coaching process. Ensure you ask the questions, not just tell the supervisor what to continue, start and stop doing.

## 6. Coaching Employees: Practice – 30 minutes



### Ask:

- What is the difference between how you previously coached employees versus the new way to determine what employees can Continue, Start, and Stop doing to achieve desired results?
- What is the major difference between this 6 step formula and how you coached agents before?
- What challenges do you anticipate using the Continue/Start/Stop model?
- How can you mitigate those challenges?

### Say:

Now you have the keys to improving agent performance and customer experience in your daily coaching sessions as well as in real time throughout the day.

## Facilitator Notes

## 7. Summary – 15 minutes

### Say:

We have answered some key questions regarding coaching. Now, as I read these key questions, please provide the answers to them. These questions are:

- What is Coaching?
- How do I coach agents in a positive and efficient way?

### Say:

*The more skilled and independent that you can help your agents become, the less time you will have to spend resolving issues.*



You have now completed the coaching lesson!  
You've accomplished this by:

- Explaining what coaching is, and how and why it's the accepted standard in professional call centers.
- Applying a 6-step formula for coaching.
- Effectively planning for coaching meetings with agents.
- Providing coaching that improves agent performance and customer experience.



### Ask:

- How can you apply coaching to the job?
- What benefits does coaching provide to you? Your agents? The company?
- What is the relationship between emotional intelligence and coaching?
- What takeaways do you have regarding coaching?

## 7. Summary – 15 minutes



### **Wrap-up**

Conclude the module and review agenda for the next day.

## Facilitator Notes



