Customer Care Center

Facilitator Guide

Management Training:

Coaching Capstone and Wrap-up

Version 2.1

Publication Date: 07/22/2015

Facilitator Guide – Agent Coaching

Table of Contents

Each Module 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
	**Exercise** identifies when activities take place during the delivery.
	**Facilitated Discussion** identifies when discussions led by the facilitator take place during the training.
	**Call** identifies a call that should be played for the agents.
	**Handout** identifies materials for the participant to reference for additional or specific information.
	**Review** identifies when the facilitator should review important points that were covered during the training.
	**Present** identifies when the PowerPoint should be used to show additional information not in the facilitator guide.
	**Click** identifies click-based animation. Look for the icon in the narrative to know when to advance to the next piece of information.
	**eLearn** 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: Coaching Capstone and Wrap-up

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 summarize the topics and key behaviors supervisors learned in this course.

Participants: Customer care center supervisors

Module Time: 6 hours

Prerequisites: The following Modules should be taken prior to this Module:

- Module 1: Introduction
- Module 2: Supervisor Tools
- Module 3: Time Allocation
- Module 4: Agent Coaching
- Module 5: Tools, Resources, and Metrics
- Module 6: Personality Styles and EQ
- Module 7: Problem-solving
- Module 8: De-escalating Distressed People
- Module 9: Labor Relations

Facilitator Materials

- Laptop
- Projector, screen
- Flip chart – prepared with the title:
  - *N/A*
- Socractive.com – prepared with key questions:
  - *N/A*
- Post-it easel sheets
- Facilitator guide
- PowerPoint presentations:
  - *N/A*

Participant Materials

- Pen or pencil
- Supervisor eLearning aid
- Handouts:
  - Supervisor Assessment & Instructions
  - Agent Coaching Job Aid
  - Continue, Start, Stop Coaching Plan

- Computer Based Training Modules:
  - *Supervisor eLearning Aid*

-

Wrap-up and Assessment Agenda	
Time	**Task**
9:50 – 11:00 a.m.	Review course objectives and purpose (**include a 15 minute break**)
11:00 – 11:45	Complete round 1 of supervisor coaching assessment
11:45-12:15	Lunch
12:20-1:20	Complete round 2 of supervisor coaching assessment
1:20-2:20	Complete round 3 of supervisor coaching assessment
2:20-2:35	15 minute break
2:35-3:05	Additional time to complete round 3 of supervisor coaching and assessment; debrief
3:05-4:00	Conclude with the What If…video
Total Time	6 hours 10 minutes

1. Review of Course Objectives and Purpose – 1 hour

Say:

We've covered a lot of ground already in this course, and you have gained valuable takeaways regarding your ability to impact others in a positive way. You have learned several key behaviors that will help you focus on the customer experience. Let's review some of these key behaviors for a few minutes.

DISCUSS

Ask:

What are the key behaviors you have been tasked with throughout this course that will help you focus more on the customer experience?

Facilitator Hint: Pre-label flip chart pages with the following labels: Role, Tools and Metrics, Personality and EQ, Problem-solving, De-escalation, and Agent Coaching. Create a list of the responses from supervisors on flip chart paper for each of the categories listed below in the left column.

Role

Ask:

How has your perception of your role changed as a result of this course?

Agent Coaching

Ask:

What role does agent coaching have in your job responsibility as a supervisor?

Ask:

- How does problem-solving and agent coaching relate?
- What's the connection between the two?

Ask: In what way does agent coaching impact the customer experience?

1. Review of Course Objectives and Purpose – 1 hour

Tools and Metrics	**Ask:** What are KPIs? Why do metrics matter? Which metrics matter and why? What tools do you have available to help you track agent performance for key metrics?
Personality & EQ	**Ask:** What behavioral changes do you need to make regarding personality styles and Emotional Intelligence?
Problem-solving	**Ask:** What do you need to do differently to efficiently solve problems? Why?
De-escalation	**Ask:** What are the steps to de-escalation? **Answer:** Self de-escalate (Relax), Listen to understand the root issues, Respond and next steps. **Ask:** In what way does your ability to coach agents to de-escalate distressed people impact the customer experience?

1. Review of Course Objectives and Purpose – 1 hour

Say:

Remember, this course is designed to help you to:

- Recognize how your role fits into the big picture of the ECC
- Align work activity with performance metrics
- Better manage stress, yours and that of your agents
- De-escalate distressed people
- Improve agent performance through effective coaching
- Improve team morale by nurturing good work culture
- Work smarter by managing time and prioritizing activities

The point of all of this is so that your role makes coaching agents a quick, easy, *and positive experience* for you and the agent so that you can help ensure positive customer experiences by focusing time and effort on metrics that matter while using your available tools and resources proficiently.

Ask:

How well do you feel you achieved these objectives? Why?

Facilitator Hint: You can show the What If…video here and then move into the coaching assessment or leave the flow as it is. It has worked very well to show the What…If video at this point in the flow and then conclude with the assessment.

Facilitator Notes

2. Coaching Plan and Assessment – 3 hours

Say:

Today, your focus will be on creating a coaching plan for each of your agents.

Say:

Today, you will listen to 3-5 of your own agent phone calls. As a result, you will need complete a Continue, Start, Stop coaching plan and schedule a coaching meeting with these 3-5 agents next week. The goal of this activity is to 1. Assess your performance and 2. Help you be prepared to start coaching your agents on your next work day.

Ask:

What questions do any of you have at this point?

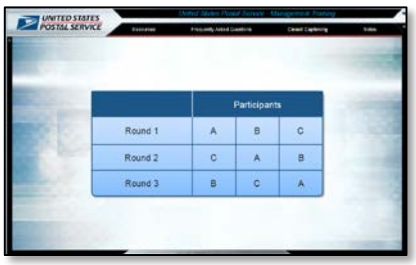
2. Coaching Plan and Assessment – 3 hours

Supervisor Coaching Assessment

Instructions:

NOTE: Supervisors must bring in their headsets

- Divide supervisors into groups of three.
- Have each supervisor access the folder on their desktops called *Supervisor Assessment*.
  - Within the folder is a spreadsheet containing hyperlinks to the audio files. Supervisors will need to locate their respective names and click on the hyperlink to play the file.
- There are three rounds to this assessment, as a result, each supervisor will need to rotate through all three roles: A - Supervisor, B - Agent, and C – Observer (aka Operations Manager).



- Once in groups, supervisors determine the roles, in other words, they decide who will go first in role A, B, and C.
- When the initial roles are established, supervisors will listen to the agent calls of role A **at the same time** (i.e., at their own computers) to ensure they save time and to mimic the real environment (they will listen to agent calls with the each of their agents).
- In this assessment, each supervisor will complete a performance-based assessment where they will listen to their own agent calls with their triad group (they need to all have their headsets with them and listen to the same call each time). One of the other supervisors will play the role of an observer (Operations Manager), while the other plays the role of the agent from the call.
- Each supervisor must complete this assessment; as a result there will be a total of 9 agent calls the triad group listens to and the respective supervisor coaches their role-play agents.
- The observer will use the coaching process to coach the supervisor regarding their application of the coaching steps.
- Additionally, the observer will use the *Supervisor Training Coaching Success Checklist* to evaluate if key steps of the coaching process was used along with detailed comments.
- Supervisors can listen to all three of their calls at once or switch between the three every other call.

Ask:

What takeaways do you have from this assessment activity?

What challenges do you anticipate implementing agent coaching?

2. Coaching Plan and Assessment – 3 hours

Say:

I think that you have developed or enhanced the capability to be effective and proficient in your role. Each of you should feel confident in your ability to be more effective.

Facilitator Notes

3. Summary and Final Thoughts 15 minutes

Say:

Let's summarize what the key point of this training experience by watching a brief video called "What if I…".

Facilitator Hint: This video is part of the eLearning support aid.

Say:

Take a few minutes and write down your thoughts about this video.

Do:

Have participants share how what they have learned this week connects to the video.

Ask:

- How will you know if you are improving and changing in your role as a supervisor?
- What clues might you get from others (peers, manager, agents)?
- What clues will you get from yourself? Think in terms of stress level and feeling more relaxed.

Say:

Each of you should walk out of this course today and ask yourselves, what would happen if…on a day-to-day basis.

3. Summary and Final Thoughts 15 minutes

Ask:

What final thoughts do you have about:

- This course?
- Your role?
- Time allocation?
- How to impact the agent experience?
- How to impact the customer experience?

Say:

The ultimate outcome for this Module is for each of you to improve customer experience through frequent and effective agent coaching, time allocation, adapting to different people's personality, problem-solving, applying strategies to de-escalate distressed people, and to use your tools and resources and work smarter, not harder.

Facilitator Hint: Wrap-up the course. Solicit any final questions.

Facilitator Notes