



How to Improve Your Customer Care Agent Coaching:

8 TIPS WE'VE LEARNED FROM THE WORLD'S LEADING COMPANIES & ANALYSTS



Automation in digital customer care is growing fast. We work with the world's largest brands and we have seen the most savvy among them reply successfully to more than 30% of customer queries with bots. Along with reducing customer wait times and potentially eliminating customer service issues before they even arise, automation also frees up the time that was once used to perform administrative tasks.

As machines do more of the routine work, and augment the work humans are doing, Customer Care is going through a lot of change.

Now is the time to up-level your coaching of your team, to help them be more successful in the important work they do.



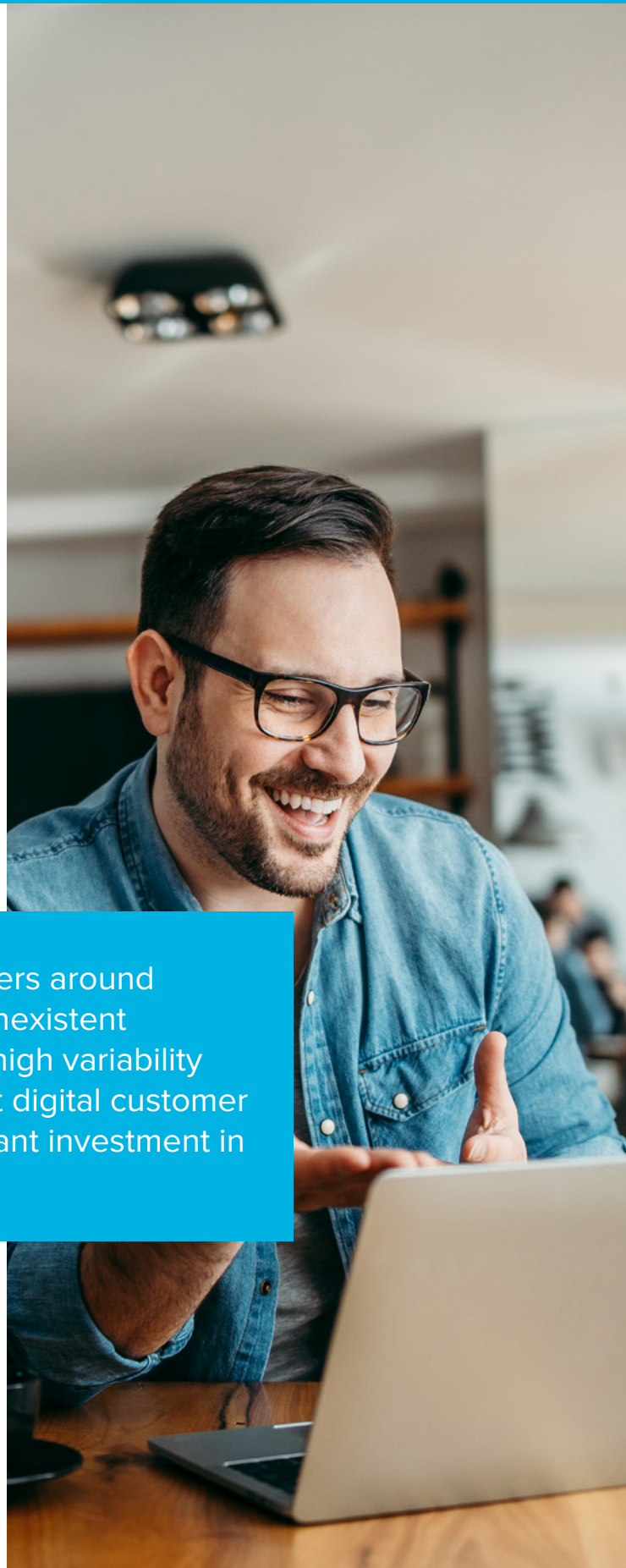
Coaching is the most important thing you can do

The strong relationships between revenue retention, and growth, customer experience and agent or employee experience, are clear across almost every industry. High-quality coaching drives improvement at every stage of the the value chain, and delivers results in terms of customer satisfaction and retention, as well as agent retention.

You may already spend a significant amount of resources on coaching your team, but analysis from a wide range of sources suggests that there is still a rich field of opportunities for improvement.

“ The hard truth is that many contact centers around the world are struggling with slow or nonexistent improvements in KPI performance, and high variability between agents,” McKinsey wrote about digital customer care in 2018. “And that’s despite significant investment in their coaching programs. ”

If you’re looking to level up your team’s customer care coaching game, here are a few tips and best practices we’ve picked up from the leaders of some of the global brands we work with every day—and a few from our friends at Forrester, McKinsey, and around the care industry.





Make your “rules of customer engagement” a living document

The digital communication landscape changes quickly. So much so that the most successful brands must continuously update 30-to-50 page long legal and PR-approved documents for rules of customer engagement. Those rules can't be too prescriptive; good coaching sets agents free to flourish.

While many managers face pressure to give their agents less—not more—freedom while working from home, the most successful teams are the most empowered ones; those who have the time and ability to provide quality customer service and improve workflows, rather than worrying more than necessary about brand compliance and risk.

A dynamic “rules of engagement” document is an essential part of that equation. Grace Brinkley, Customer UX Researcher at Sprinklr, put it this way:

“ The reality of the situation is that a lot of people in agent roles are either still engaging in mundane, boring actions with very little mobility, or worse, forced to interact with negative customers day in and day out. Agent empowerment can change that—a little bit of coaching can help give their roles meaning, allow them more creativity and ownership in daily tasks, and set them up for a more fulfilling position later. ”

For coaches, the benefits go beyond KPIs, too. As management guru Tom Peters said, when it comes to leading people, “the journey is the reward.”



Invest in emotional coaching

How do you coach agents in emotional well-being? There are many different approaches, but some very good ones were written up by Karin Hurt of Let's Grow Leaders on ICMI last Summer. Her first tip is especially good. Hurt says agents who consistently keep their cool have one thing in common. "They nail the first 40 seconds of the call by showing up as an empathetic expert. They're like a customer-whisperer calming the angry caller with their human connection and 'I've got this' credibility.

“ If you have an agent who struggles to stay calm with angry customers, use your next coaching to listen to the first 40 seconds of as many angry customer calls as you can, and strategize what empathy and confidence statements would work best. It's easier to stay in control of your emotions when you feel confident and competent in your approach. ”



Watch out for over-optimization of single metrics

When looking at an agent's performance, it's tempting (but dangerous) for coaches to put too much emphasis on any single metric, especially when it confirms what you already believe. If, for example, an agent is resolving problems in far less time than average, they may be a rock star—or they might not be paying as much attention as they should. Remember that metrics are not always the answer. Instead, they are pointers for what to ask questions about. To get a clear picture of the person you are coaching, it's best to consider multiple data points, such as first call resolution (FCR), product/service knowledge, customer handover rates, and minutes spent on call. Examine qualitative information as well, like tone, language, and problem-solving skills. You'll be more prepared to offer better coaching that's based on a holistic understanding of how the agent is truly performing. What do the numbers actually mean for both the agent's overall performance and the customer experience?

“When metrics are discussed during individual agent coaching sessions, you need to make sure that your coach knows how to explain them in terms of Customer Experience,” Melissa Kovacevic, Principal at CommPlan Consulting once wrote. “Metrics should always be a part of coaching, as long as they mean something to the customer and our business needs. I love to see quality monitoring forms for calls that incorporate metrics, as well as the soft skills and other skills needed for best quality.

“ We need to make sure that our coaches aren't just reading metrics numbers to agents, but are instead preparing for their coaching sessions by reviewing those numbers and how they relate to skills demonstrated and the overall customer experience. ”



Identify and test theses

Use your coaching insights to develop a set of theses (“I believe we may have issues with topics X, Y, and Z”) and then test them against your historical data. If your theses are supported, then you’ve identified some good coaching topics.

Enterprise care teams have enough data that you should use artificial intelligence (AI) to monitor and group customer engagements. As discussed in a recent roundtable on analytics at UCToday:

“ AI technology can do what humans cannot—it can consistently measure subjective behaviors with no bias, revolutionizing how managers and representatives communicate both internally and with customers. The best programs can spend more time developing the right coaching solutions, rather than using inefficient and subjective random sampling. ”

With AI, the identification of coaching topics and areas for improvement becomes a matter of strategy, rather than guesswork.

Invest in group coaching

Coaching agents in groups can be stressful (like fishbowl exercises), but it can also be empowering. More mature organizations use group coaching to encourage individual agents to think for themselves and answer customer needs in their own way, within brand guidelines.

Peer coaching can have huge benefits in agent performance, but that's most likely to work if the coaching is targeted, structured, thoughtfully facilitated, and frequent. Setting up a peer-to-peer coaching network helps to build accountability, according to Stewart D. Friedman, founder of the Wharton Leadership program.

Start in small groups of three and provide each team with basic guidelines to map out their goals. They should establish expectations, a meeting schedule, and understanding of what each hopes to achieve.

“The heart of non-directive, or developmental, peer-to-peer coaching is asking useful questions,” said Friedman.

“ Many people fear change because it forces them into unknown territory, where things are unpredictable and unfamiliar. And yet there are predictable stages people go through when they undertake intentional change. Coaches help others to see and feel the need to create meaningful, sustainable change. ”

Experts at McKinsey agree. Effective, regular huddles allow for time to facilitate sharing of best practices, clarify and reinforce employee expectations, set fun team goals, celebrate peer performance, and emphasize the critical roles that agents play. If structured properly and held consistently, huddles typically improve both agent happiness and performance significantly (especially among lower-performing employees). Done right, your employees will feel empowered, enriched, and may even leave with a new skill set. They'll appreciate that throughout their time with you.

Implement extended nesting periods

Nesting—the time new agents spend training with supervisors—is a critical period that helps determine how successful agents will be on their own. Based on McKinsey’s observations, the longer the onboarding process, the better the agent’s performance. At least two weeks is best. The most common nesting period was one to two weeks, reported by 28% of respondents; 11% spent more than two months nesting.

The size of the employee’s nesting cohort also plays an important role in employee satisfaction. 40% of dissatisfied agents had a nesting cohort of 5 or fewer colleagues, suggesting that larger cohorts may lead to increased team cohesion and support.



Set up targeted optimization

All coaching isn’t created equal. Technology can help highlight areas that need improvement and create a plan of action. One global service provider used a combination of technologies to develop an integrated coaching platform for a large contact center using data from multiple sources, including customer-relationship management (CRM), call routing, and interactive voice response (IVR). The coaching platform automatically calculated granular performance metrics for each agent and presented its results to team

leaders as an “intelligent action board,” which highlighted areas of concern and recommended coaching actions that could improve agent performance.

This allowed management to coach on common help topics and pinpoint specific areas of concern for agents to focus on in daily training. One contact center saw a 15% agent productivity gain by following a strategy combining general coaching for lower performers and topic-specific training for higher performers.



Capture insights beyond solving single problems

We're seeing more and more care managers mature their coaching into a two-way relationship. While providing support for agents who need to improve their performance, the experiences of the agents—both individually and as a group—offer data points that managers can use to capture insights that can be valuable for the entire enterprise.

The most mature care organizations are highly skilled at delivering insights from the front lines to the rest of the organization, and we expect this skill to become more widespread. These insights can be incredibly valuable to share with marketing, research, and product teams.

Forrester argues that companies that go beyond being data driven, and are instead insights driven, are now poised to grow 8 to 10 times faster than other companies.

This may be the Holy Grail of customer care, and coaching can help agents be a more active contributor to the pursuit of insights.

