

COACHING & MONITORING WITH MYRA GOLDEN

LEARN HOW TO COACH YOUR AGENTS TO OPTIMAL PERFORMANCE

7 EASY STEPS

PLANNING YOUR QUALITY MONITORING STRATEGY

1. Identify goals
2. Determine method
3. Create standards of measurement
4. Design forms
5. Determine frequency
6. Decide on coaching strategy
7. Create calibration plan

IDENTIFY YOUR

GOALS



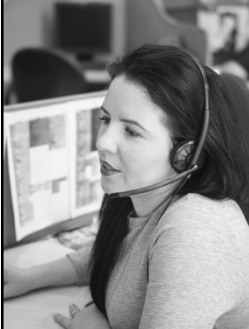
DETERMINE METHOD

CALL RECORD. SIDE-BY-SIDE. SILENT.



CREATE

STANDARDS

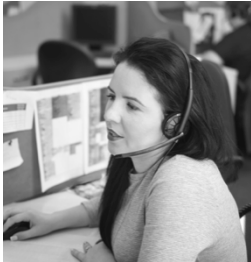


MINIMAL ACCEPTABLE
PERFORMANCE FOR ALL
EMPLOYEES

STANDARD

STANDARDS (EXAMPLE)

- › Uses standard greeting
- › Identified self by name
- › Uses customer's name at least once
- › Proper hold procedure





Describe something you want employees to accomplish, but that you understand will be accomplished to different degrees depending on the employee's skill level and unique properties of the call.

OBJECTIVES

OBJECTIVES (EXAMPLE)

- Builds rapport
- Conveys empathy
- Makes connection
- Demonstrates sense of urgency



BE CRYSTAL CLEAR ON OBJECTIVES

EXAMPLE OF CLARITY ON OBJECTIVE

"MAKES CONNECTION"

- Uses caller's name at least once
- Doesn't interrupt or over talk customer
- Engages in appropriate small talk. For example: If customer says "How are you?" employee responds with something similar to: "I'm well. How nice of you to ask." (Smile in voice, sounding friendly and interested)

WHAT IT ENTAILS

THE MONITORING FORM

- Administrative information
- Scale of measurement
- Standards/Objectives
- Plenty of room for comments
- Keep it short - 1-2 pages is ideal

Quality Call Monitoring Form

Employee _____ Date _____

Comments _____

Point Scale:

1 (Excellent) 2 (Good) 3 (Satisfactory) 4 (Needs Improvement) 5 (Needs Development) 6 (Needs Improvement) 7 (Needs Development) 8 (Needs Improvement) 9 (Needs Development) 10 (Needs Development)

A. OPENING ON A POSITIVE NOTE 10% Weight 1-2-3-4-5

- 1. Use American Best Standard Greeting with energy and enthusiasm.
 - a. "Thank you for calling American Best. How can I help you today?"
 - b. "Thank you for calling American Best. How can I help you today?"
 - c. "Thank you for calling American Best. How can I help you today?"
- 2. Answer for call within 30 seconds and offer assistance. "How may I help you?"
- 3. Identify the caller's name. "May I have your name please?"
- 4. Identify the caller's address. "May I have your address please?"
- 5. Identify the caller's phone number. "May I have your phone number please?"
- 6. Identify the caller's email address. "May I have your email address please?"
- 7. Identify the caller's social media handles. "May I have your social media handles please?"
- 8. Identify the caller's account number. "May I have your account number please?"
- 9. Identify the caller's policy number. "May I have your policy number please?"
- 10. Identify the caller's claim number. "May I have your claim number please?"

Monitor quality during the call. _____

B. PROFESSIONAL ETIQUETTE 10% Weight 1-2-3-4-5

- 1. Listen to customer's needs and respond accordingly.
- 2. Speak in a clear, concise, and professional manner.
- 3. Avoid using jargon and technical terms.
- 4. Avoid using slang and informal language.
- 5. Avoid using profanity and offensive language.
- 6. Avoid using excessive apologies.
- 7. Avoid using excessive promises.
- 8. Avoid using excessive promises.
- 9. Avoid using excessive promises.
- 10. Avoid using excessive promises.

Monitor quality during the call. _____

1 of 3

C. CLOSING, ACKNOWLEDGMENT, ASSURANCE 10% Weight 1-2-3-4-5

- 1. Acknowledge customer's needs and respond accordingly.
- 2. Acknowledge customer's needs and respond accordingly.
- 3. Acknowledge customer's needs and respond accordingly.
- 4. Acknowledge customer's needs and respond accordingly.
- 5. Acknowledge customer's needs and respond accordingly.
- 6. Acknowledge customer's needs and respond accordingly.
- 7. Acknowledge customer's needs and respond accordingly.
- 8. Acknowledge customer's needs and respond accordingly.
- 9. Acknowledge customer's needs and respond accordingly.
- 10. Acknowledge customer's needs and respond accordingly.

Monitor quality during the call. _____

D. MONITORING THE CALL 10% Weight 1-2-3-4-5

- 1. Monitor the call for quality and accuracy.
- 2. Monitor the call for quality and accuracy.
- 3. Monitor the call for quality and accuracy.
- 4. Monitor the call for quality and accuracy.
- 5. Monitor the call for quality and accuracy.
- 6. Monitor the call for quality and accuracy.
- 7. Monitor the call for quality and accuracy.
- 8. Monitor the call for quality and accuracy.
- 9. Monitor the call for quality and accuracy.
- 10. Monitor the call for quality and accuracy.

Monitor quality during the call. _____

E. MONITORING ON A POSITIVE NOTE 10% Weight 1-2-3-4-5

- 1. Monitor the call for quality and accuracy.
- 2. Monitor the call for quality and accuracy.
- 3. Monitor the call for quality and accuracy.
- 4. Monitor the call for quality and accuracy.
- 5. Monitor the call for quality and accuracy.
- 6. Monitor the call for quality and accuracy.
- 7. Monitor the call for quality and accuracy.
- 8. Monitor the call for quality and accuracy.
- 9. Monitor the call for quality and accuracy.
- 10. Monitor the call for quality and accuracy.

Monitor quality during the call. _____

2 of 3

YES/NO....POINT SCALE

BEST WAY TO

CODE

HOW OFTEN SHOULD YOU

MONITOR CALLS?



DEVELOP A COACHING STRATEGY

WHY EMPLOYEES DON'T PERFORM

- ▶ Lacks skill/capabilities
- ▶ Something is keeping them from doing their job
- ▶ Don't want to (apathy)



THE PROBLEM

MISTAKES IN COACHING CAN:

- ▶ Make employees feel defeated
- ▶ Cause resentment and make your job harder
- ▶ Rob you of credibility
- ▶ Make you appear weak or inconsistent
- ▶ Make it harder for employees to correct performance



9 STEPS FOR COACHING AGENT CALLS

9 STEPS FOR COACHING AGENTS

1. Randomly record 2-3 calls per Agent
2. Review calls (alone), making notes
3. Play call #1 and let your Agent respond
4. Have employee respond to call
5. Coach the call
6. Get commitment for improvement
7. Repeat steps 2-6, if necessary
8. Follow-up between coaching sessions
9. Discuss progress at top of next coaching session



COACHING THROUGH QUESTIONING

THIS IS THE SECRET TO GETTING EMPLOYEES TO TAKE OWNERSHIP

COACH THROUGH QUESTIONING

1. Ask a question
2. Let employee respond
3. Repeat steps 1 & 2
4. Offer ideas as needed



EXAMPLE

COACHING THROUGH QUESTIONING

- ▶ **Coach:** "Tell me what you think of that call."
- ▶ **Employee:** "It was fine."
- ▶ **Coach:** "Why do you describe it as fine? Why not 'amazing' or 'bad'?"
- ▶ **Employee:** "I did what I was supposed to do. I just wouldn't say I wowed the customer."
- ▶ **Coach:** "What might you have done to get to a 'wow' reaction?"
- ▶ **Employee:** "I could have used the customer's name, maybe laughed at her joke."

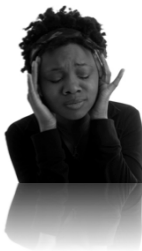
"MY JOB IS NOT TO BE EASY ON PEOPLE. MY JOB IS TO TAKE THESE GREAT PEOPLE WE HAVE AND TO PUSH THEM AND MAKE THEM EVEN BETTER."

Steve Jobs

EMPLOYEES SHOULD WALK AWAY FROM COACHING MEETINGS FEELING GOOD/BETTER.

AVOID SOUNDING CRITICAL/NITPICKY

- ▶ Limit correction to only 1-2 customer-impacting issues per session
- ▶ Lead with a genuine positive
- ▶ End with sincere encouragement
- ▶ Write this down:
 - ▶ Make coaching a dialogue



COACHING LOW-RISK SITUATIONS

"WHAT I LIKE ABOUT _____. AND HERE IS SOMETHING I'D LIKE YOU TO WORK ON."



PREPARING FOR COACHING
MEETINGS WITH AGENTS

K F D



4 PAIN POINTS OF COACHING

**AND HOW TO HANDLE
THEM**

THE HOT STOVE RULE

- › Immediate
- › Foreseeable
- › Consistent
- › Impersonal



**KEEPING WHINERS AND
BLAMERS FOCUSED**

KEEPING WHINERS AND BLAMERS FOCUSED

PHRASES TO USE:

- ▶ "How does this relate to your performance?"
- ▶ "I respect the fact that we disagree on the meaning of the word "abrasive".
- ▶ "How can I help you get this roadblock removed?"
- ▶ "What seems to be the difficulty here?"
- ▶ "I'm sure this not how it seems to you, but I need you to see ____"
- ▶ "This is about you and your ____"

BONUS TAKE-AWAY

RESOURCE

YOU WILL NEED TO

CALIBRATE

HOW TO CALIBRATE

1. Allow up to 90 minutes for meeting
2. Select a facilitator
3. Prepare one recorded call
4. Play recorded call and have all "monitors" evaluate the call using your monitoring form
5. Facilitator calls on one person to verbally recap the call and to share her ratings
6. Facilitator leads discussion on call evaluation

CALIBRATION GOAL

- ▶ Calibrate within 97 - 98%
- ▶ Apply this understanding to future evaluated calls



**START
STOP
CONTINUE**

CONNECTION

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