

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

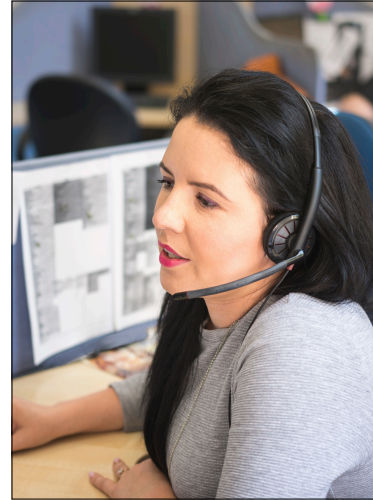
GOALS

DETERMINE METHOD

CALL RECORD. SIDE-BY-SIDE. SILENT.

CREATE

STANDARDS

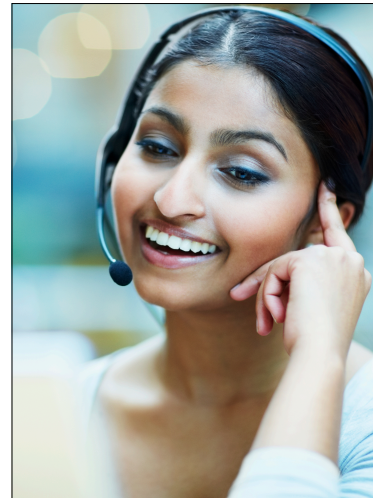


MINIMAL ACCEPTABLE
PERFORMANCE FOR ALL
EMPLOYEES

STANDARDS

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: _____

Customer: _____

Point Scale:

1. Unacceptable 2. Needs Improvement 3. Approaching Expectations 4. Meeting Expectations 5. Mastery

A. OPENING ON A POSITIVE NOTE	35% Weight	1 2 3 4 5
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- Uses American West Standard Greeting with energy and enthusiasm
 - "Thank you for calling American West [spoken with energy and enthusiasm] My name is Michelle. How may I help you?"
 - Answered the call ready to serve and offered assistance, "How may I help you?"
 - Identified self by name
 - Asked for customer's name "May I ask who I am speaking with?" or "I can certainly help you with that, May I ask who I'm speaking with? Great, Lauren, do you happen to have a tracking number?"
 - Spoke with energy and enthusiasm

Multiply rating by "7" to get total score **Score** _____

B. PROFESSIONAL ETIQUETTE	35% Weight	1 2 3 4 5
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- Used the customer's name at least once
- Says "please" and "thank you."
- Speaks in complete sentences
- Avoided sounding distracted and thinking out loud
- Proper hold procedure:
 - Asked for permission to place caller on hold
 - Said, "Thank you for holding."
 - Kept customers apprised during extended hold times
 - Struck to keep hold to a minimum. (First time cannot exceed 3 minutes)
 - After no more than 3 minutes, checked back with the customer, thanked them and provided an update.
 - "Thank you for holding Mr. Smith. I'm trying to reach an agent..."
- Yielded the customer to avoid over speaking/allowed caller to finish statement before further speaking
- Avoided using casual language
- Maintained fluidity during the call

Multiply rating by "T" to get total score Score _____

C. EMPATHY, ACKNOWLEDGMENT, ASSURANCE	15% Weight	1	2	3	4	5
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- Demonstrated empathy when appropriate
- Used empathic listening skills
- Offered acknowledgement statements when appropriate: "I see," "I understand your concern," "I am happy to check the status of your shipment for you."
- Assured customer to establish trust when appropriate
- Established a friendly interaction to enhance customer experience and give a sense of connection
- Spoke in a friendly, courteous and helpful tone throughout call

Multiply rating by "J" to get total score **Score** _____

D. SERVICING THE CALL	10% Weight	1 2 3 4 5
1. How many times did you receive a call from a customer?		
2. How many times did you receive a call from a customer who was not satisfied with the service?		
3. How many times did you receive a call from a customer who was not satisfied with the service?		
4. How many times did you receive a call from a customer who was not satisfied with the service?		
5. How many times did you receive a call from a customer who was not satisfied with the service?		
6. How many times did you receive a call from a customer who was not satisfied with the service?		
7. How many times did you receive a call from a customer who was not satisfied with the service?		
8. How many times did you receive a call from a customer who was not satisfied with the service?		
9. How many times did you receive a call from a customer who was not satisfied with the service?		
10. How many times did you receive a call from a customer who was not satisfied with the service?		

- Employee demonstrated knowledge of offerings and clearly explained offerings
- Spoke specifically (i.e. instead of "it" all) on June 12nd: "Says something similar to 'You alignment will arrive in the next 2-3 weeks'"
- Breaks bad news to customer in a positive manner: "This is a no more acceptable to us than it is to you." "Oh I know you were looking forward to getting this thing..."
- "I know you are expecting 20 minutes to receive a call for next customer in the loop when a 20 minute error is not possible"
- Proactively assessed customer considering all segments of the supply chain (Not giving out agent information to customer, but giving out agent information to customer, verifies correct information, address, tractor trailer access, receiving hours, but notes it of all important information, etc.)
- Avoided industry jargon and terms
- Used partnership language. Instead of saying, "I don't know" on "say something similar to," "The best person to answer that question is dispatch. May I place you on hold while I try to reach them?"

Multiply rating by "2" to get total score **Score** _____

E. ENDING ON A POSITIVE NOTE	5% Weight	1 2 3 4 5
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- Assertively bring the call to a close; don't wait for the customer to close the call
 - When relevant, recapped and provided any next steps with details so that customers are clear and feel confident in company's ability to ship quickly and accurately
 - Thanked customer for their business
 - Closed the call with warmth and friendliness in vocal tone
 - Closing similar to:
 - o "Have I answered all your questions? Thank you for your business. My name is Mathelle and it was my pleasure serving you today."
 - o "Is there anything else I can do for you today? Well, the only thing left is for me to wish you a great day!"
- Malloy rating to "3" in go out score* **Score** _____

Multiply rating by "1" to get total score **Score** _____

Total Score _____

COMMENTS

YES/NO....POINT SCALE

BEST WAY TO SCORE

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."*

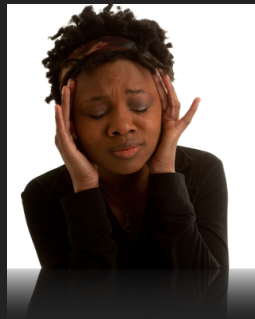
“MY JOB IS NOT TO BE EASY ON PEOPLE. MY JOB IS TO TAKE THESE GREAT PEOPLE WE HAVE AND TO PUSH THEM AND MAKE THEM EVEN BETTER.”

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

KFD



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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