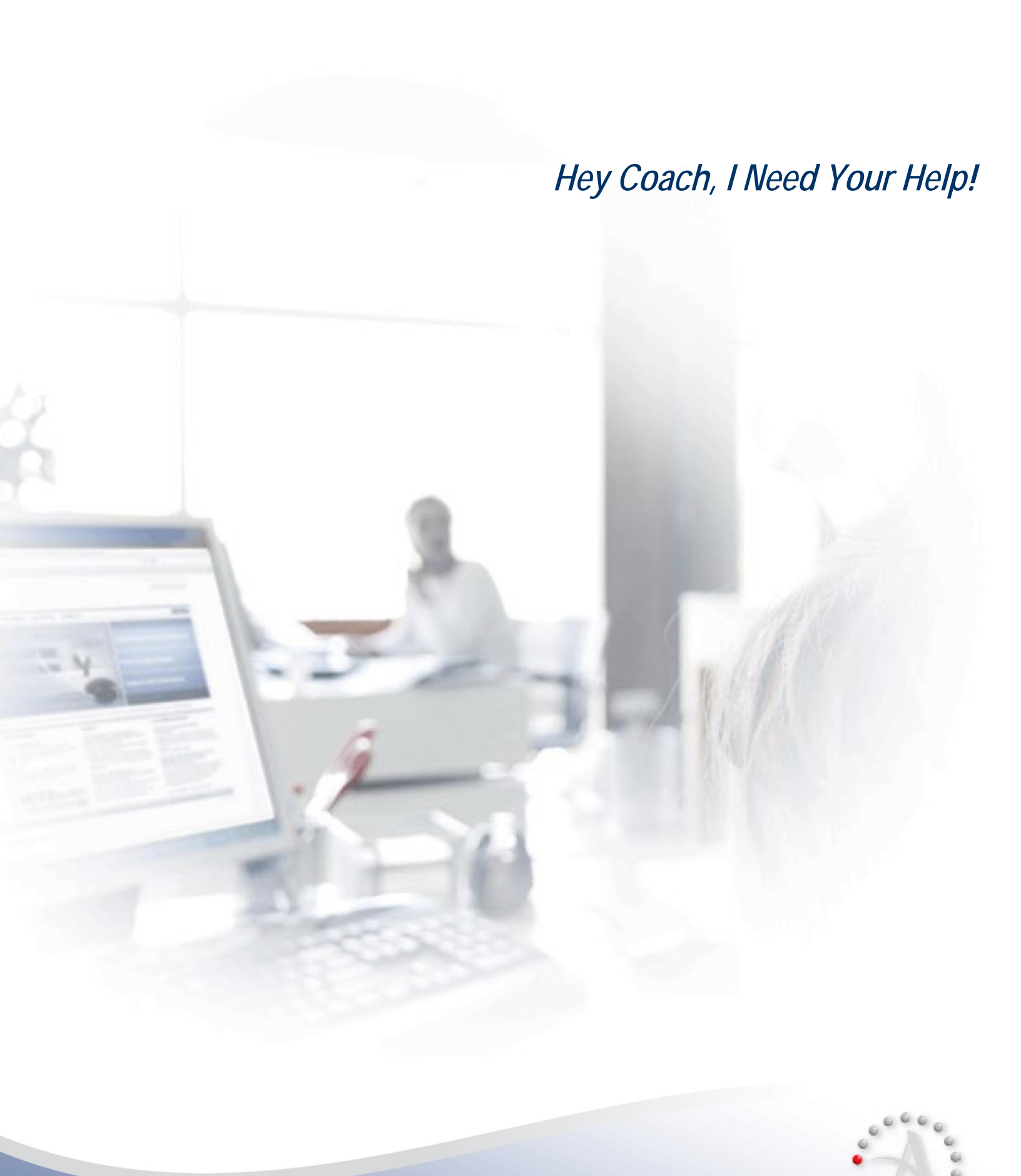


Hey Coach, I Need Your Help!



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Hey Coach, I Need Your Help!

During our visits with various contact centers, the word “coaching” is often used in conversations with management. However, it isn't always clear what coaching actually means. A good operational definition of coaching is: Taking the time to develop a person’s skills by teaching and communicating, and by measuring their success.

According to the most successful football coach of all time, Vince Lombardi, “Coaching fosters a winning attitude by engendering a vision from the bottom up, motivating constructively and building accountability and resiliency within the team.”

Coach Lombardi’s definition of coaching is simple, straightforward and gets at the heart of how leaders should apply this valuable activity. No matter what type of contact center environment you’re leading, there is a team. It may be well defined -- with a small group handling a specific product – or it may be comprised of hundreds of individuals all answering a variety of questions. The reality of a pooled service environment is that the workloads (customer inquiries) are shared among a group of people...or a team. Because individual activities do and will impact everyone else on the team, Coach Lombardi's definition applies – you’re successful when you improve your team, one person at a time.

“Coaching is taking the time to develop a person’s skills by teaching and communicating, and by measuring their success.”

To begin applying any definition of coaching, you have to approach it with discipline and have an appreciation for the value it brings to your employees and the company. That said, you must make the time to prepare for coaching, set aside time for regularly scheduled coaching sessions, and develop ways to track individual performance improvements. On the surface, this sounds simple, but in the dynamic, real-time environment of a contact center, this can prove to be a daunting endeavor. And, if you’re like most contact center leaders, your plate is already full, so any new addition will come at the expense of an existing activity.

It Starts with an Investment Commitment

Whether you are an experienced coach and simply looking for new ways to improve, or in the beginning stages of establishing a formal program, you have to be honest with yourself, your company and your employees with regard to the amount of time you’ll actually have to dedicate to coaching. If you have 10 direct reports and are spending less than 10 hours of every week on coaching activities, you’re not investing the time needed to do it effectively and in ways that will

provide real returns for your organization. There are several reasons why people say they can't dedicate 10 hours every week to coaching, and some are very creative, but in many cases, the reason they can't spend time coaching is simply because they haven't become accustomed to doing so. If Vince Lombardi had not focused his time helping each one of his players get better at contributing to the team, he wouldn't have been successful. And, when you're not successful, you end up spending a lot more time explaining why you're not successful, thus taking time away from the activity that makes you successful – growing your people through coaching. Applied to the real time contact center world – when the metrics aren't there, we spend a lot of time trying to fix the metrics at the expense of spending time with agents. Thus begins a cycle that is hard to break.

Get the buy-in from senior management for a coaching program – and the time that is needed. This is no simple task, and starts with looking to your own team of peers – get them all on board and start by spending some time together talking about different approaches to coaching, the benefits of spending time with the frontline, the potential return on the time investment and the impact on the enterprise's bottom line, and what things would need to change to make more time for coaching. You'll most likely find that just about every leader could make time for coaching if there were fewer administrative type activities...and what you'll also find is that if these activities were "pooled" (similar to the what you do with the inbound contact center workload), tremendous efficiencies could be gained. Next, turn your attention to the other results, and document all of the wins for the company by moving the administrative tasks from leaders and providing them with time to develop their "teams".

Don't Assume Managers Know How to Coach

From there, you'll need to determine how to formally implement the program in your organization. Too often, programs are implemented without spending the time to train the coaches. You can't assume that everyone on your staff has the natural ability to coach effectively -- even your most successful managers can use a "tune-up" from time to time.

Coaching is most effective when there is two-way communication -- and this also holds true for the development of the program. Get the key people involved in the program's development and execution. This will help gain the internal buy-in and will raise the education level of everyone involved.

There are several programs, training manuals and guides for implementing coaching programs on the market. While some, better than others, most are helpful in defining the foundation on which to build your program. Because effective coaching in a contact center has a direct impact

on the overall service provided, the implementation of a new coaching program should be given the same attention and focus as a new technology implementation – if not more. And the development of the program should be tracked and communicated along with the other key metrics in the contact center.

Coach Lombardi's definition starts with a simple principle – foster a winning attitude. Every one of his players looked to him each day for the inspiration to maintain that attitude. So, no matter what type of program you develop, its success starts with the coach, how they carry themselves and the attitude they project each and every day. This is important for everyone in leadership to understand: Even when you're not directly interacting with your employees, you are coaching -- and your actions, attitudes, and gestures have a lot to do with how effective you'll be when it comes time to provide the direct feedback that will inspire your teams. To be a good coach, you have to walk the talk – if everyone doesn't buy into this concept, the best program in the world will fail because the “vision from the bottom up” will become blurred.

Once you've established the fact that leaders are always coaches, the next step is to help all of your coaches gain an appreciation for what makes the good ones great. Almost all coaches at one time were players (and all managers at one time were frontline workers), and have had both good and bad experiences working with managers and peers. The coaches we remember, appreciate and most want to emulate most likely possessed the qualities of a great coach: listens effectively; good at providing new challenges; provides clear-cut expectations and feedback; pushes themselves as hard as their individuals; continually celebrates the wins and helps understand the losses, etc. The key is to have all of your coaches define for themselves what makes a great coach. Capture this and make it the foundation for your coaching program.

Establish the Ground Rules and Keep it Simple

Once you've developed the guiding principles of your, and everyone that will be involved in delivering coaching has an appreciation for what it's going to take for them to begin to emulate these behaviors, it's time to develop the overall program. Again, there are only two wrong ways to do this: 1) by not doing it at all; and 2) by doing it in a vacuum without input from those that will be living it day to day. Although you'll most likely have several blueprints of what a successful program looks like, the best approach is to start with a very generic foundational approach – this way, everyone involved will provide their perspective on what it means, how to obtain the needed information and how best to share it with the teams. Some things you'll need to spend time on include:

- 1. Preparation** – what information the coach and team member will need access to prior to the formal sessions. Typical activities include development of forms, standardizing metrics, reviewing history and developing action plans.
- 2. Discussion template development** -- what steps to follow in communicating with team members during formal coaching sessions. This step normally involves outlining the activities to cover in every session regardless of the nature of the feedback or opportunities uncovered during the preparation phase. You'll want to spend a lot of time focused on listening and making the team members feel comfortable sharing and being receptive to feedback. The formal discussion isn't about changing behavior, it's about understanding the drivers behind behaviors (positive and negative) and the only way to get there is to spend most of the time listening.
- 3. Goal development** – what you've agreed to focus on between now and the next formal session and, based on these, the timing of the next sessions. Every team member is unique and has different needs – some may need more attention than others, and, in most cases, everyone's primary focus will be a little different. Coming to an agreement on where, when, and how is a joint effort between the coach and player – and should include the documentation of the next steps and measures of success. The key is for everyone to commit to the time required to improve.

Getting Started with the 30-Minute Call Discussion

This is a 30-minute monitored-call coaching model between the supervisor/team leader and the agent. Remember: call coaching is just one element in a formal coaching program, and as your program evolves, it becomes the baseline for the behavior focused discussions.

A typical 30-minute coaching session would consist of the following:

- Team leader listens to a number of calls prior to the coaching session and evaluates the calls.
- Team leader and agent meet for a coaching session. Agent listens to calls and self-evaluates his/her performance – identifying the positive aspects of the interaction as well as any opportunities for improvement.
- Team leader shares his/her feedback with the agent in a positive manner. (For every "opportunity for improvement" cited by the team leader, there should be at least two strengths communicated as well.)
- Team leader and agent together exchange ideas and make suggestions on how to improve call quality.
- Agent leaves the coaching session with a concise roadmap defining what he/she will be focusing on before the next coaching session. Agent and supervisor also discuss ways to enhance the value of future coaching sessions.
- The supervisor/team leader documents what transpired during the coaching session to help track progress.

With the Right Foundation, the Program Becomes Secondary

Once you've developed goals, measures and your communication protocol, coaching becomes more about improving the individual than about the coach or the formal process. Just like in football, the coach lays the foundation, provides advice and even calls the plays, but it's the players that have to execute and make real-time decisions and adjustments. The same holds true in a contact center – your players will be making thousands of real-time decisions every month and need to be provided a pathway to success. And, with success being a moving target, everyone (even the best) need to be part of a formal program that leads to success.

About the Authors

Tim Montgomery is the Founder of The Service Level Group – A contact center- focused consulting and training organization that helps contact centers leverage their competitive advantages. As a seasoned industry executive, he has guided thousands of contact center agents and leaders to improve individual and team performance, and exceed operational objectives. Tim has also earned a certified associate designation from the International Customer Management Institute (ICMI).

During his career, Tim has held a variety of leadership positions, from contact center manager to Vice President of Sales and Operations. His hands-on contact center leadership experience was fine-tuned by working for three of the most celebrated service companies in the world – USAA, The Coca-Cola Company and The SCOOTER Store. Tim's expertise in customer service and contact center operations allows him to lead a wide range of consulting engagements for companies in a variety of industries. His consulting clients have included some of the most recognized companies in America –DELL, AIG, Lifetouch Publishing, Mitsubishi Motors, Allstate, Kodak, Liberty Mutual, Cinergy, and many more.

Roger Lee has more than 15 years combined experience in finance, call center operations, information management systems, restaurant operations, payroll services and quality. This experience includes developing and implementing a call monitoring program, formalizing and implementing Lean and Six Sigma in the call centers within Deluxe Business Services, a business unit within Deluxe Corporation.

Roger served as a team leader for the Minnesota Council for Quality, assessing local companies using the Malcolm Baldrige criteria. Roger is also a member of the American Society of Quality (ASQ) and was elected Vice Chair of the Education & Advancement section of the Minnesota chapter.

As part of his worldwide travels, Roger has given many presentations and written articles on various topics impacting the call center including: workforce optimization, quality monitoring and Six Sigma, Six Sigma in a service environment, how to apply Six Sigma, leadership skills and the importance of developing frontline employees. He has been featured in global industry publications such as: *Contact Center World*, *Customer Interaction Solutions*, *Call Center Network Group (CCNG)*, and *Call Center Magazine*.



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