

Call Center Coaching

Part I



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The ancient mathematician and philosopher Archimedes once said:
“Give me a lever long enough and a fulcrum on which to place it and I can move the world.”

In our industry, the frontline leaders—whether they are called supervisors, coaches, or team leaders—are the long levers of organizational performance. The success of your center rests on their shoulders. They must master the many skills of leadership. Of all those skills, the skill of coaching is the most important.

Developing coaches

Frontline leaders wear many hats. They are often called on to run the floor; they supervise operations; they answer questions of reps; they are alternately counselors and disciplinarians; they do scheduling; they track down the lost and the tardy; they generate reports and more reports; they often perform QA monitoring.... The list could go on.

Once you decide to get serious about coaching, the first step is to permit your frontline leaders the time to focus on their most important priority—**coaching**.

In my coaching workshops, I issue the following challenge to call center coaches.

If you are not spending 50% of your time developing your people, then why are you on the payroll?

You cannot pile more food onto an already full plate. Frontline leaders need to stop doing some of the aforementioned things so that they can make the time to develop their people. This is where senior management can help. Some of their time constraints are self-induced and some are induced by managers.

My advice to managers

There are two things you can do to free the time of your coaches to coach.

Coaches make easy targets for delegating administrative and reporting chores to. Stop doing that! Use administrative assistants to do administrative work. Free your frontline leaders from all forms of administrative.

Then, handle monitoring in a way that I will recommend below. It is perhaps different than you are handling it now.

My advice to frontline leaders

Stop acting like walking help desks. I see operations where frontline leaders spend 60% to 70% of their time reacting to what is happening on the floor. They answer questions and solve customer's problems for reps; they handle complicated or escalated calls.

This is a habit born of good intentions, but it has ill consequences.



The natural response, if a customer is on hold and a rep has her hand in the air, is for the supervisor to quickly come up with the answer the rep needs. It seems the customer-focused thing to do. But in the long run, (except with new agents) this produces more problems than it solves. By answering for them, you condition your reps to stop thinking for themselves. You condition them to seek the easy way out next time, too. It becomes more convenient for them to rely on your brain than to engage their own.

There's an old saying, "Give a man a fish and he eats for a day; teach a man to fish and he eats for life." It's true in call centers. The job of a leader is not to do, but to coach those who do.

If you are a frontline leader, continually ask yourself, "Why am I on the payroll?" The answer is that you are on the payroll to spend time knee-to-knee, elbow-to-elbow with your reps, developing them to the fullest of their potential.

A different approach

There are essentially two types of call observations. These are *remote* and *side-by-side*.

Each type of observation serves certain purposes well. It's when we confuse their purposes that we diminish effectiveness. I see confusion of purposes in a lot of the call centers I visit. Here are some valuable distinctions to keep in mind.

The best use of remote observations is for quality assurance (QA) purposes. The goal of remote observations is to evaluate performance. It's a judgmental role. Do not try and use remote observations also as a coaching tool.

The primary purpose of side-by-side observations is quite different. Here the goal is developmental. This is where effective coaching can take place.

You see, you cannot judge people and develop them at the same time. Too many psychological barriers get in the way. Therefore, you must separate the two functions.

Here's another difference. Remote observations are quantitative in nature. We tend to score the entire call. Using some type of observation form, we reduce the observation to a numerical score. This is useful for evaluation as well as for identifying

trends. In fact, the greatest value from remote observations comes from trending performance over time. Quantitative feedback from remote observations has greatest validity when it reports on multiple calls over a period of time.

Side by side observations, on the other hand, are inherently qualitative. Do not score them. Don't use your monitoring forms during side-by-side coaching sessions. It's far better to focus on just one coachable aspect of the call per session; not on the whole call. You may be asking, "If we don't score them, then how will we know that coaching is effective?" My answer is that improved performance will show up on the next set of QA observation scores.

In call centers, we tend to think of remote monitoring as being a tool for evaluating the performance of reps. And it is. Yet, it is even more valuable as a tool for evaluating *you*... the leader of the group. It is *your* report card. These results tell you what you're doing well and what you need to do differently to develop your people.

Because remote monitoring is essentially a scorecard on management, a dedicated QA team best handles the task. This team should report directly to senior management without reporting through supervisory channels. If not, you are likely to get grade inflation. Of course, you do need a well thought out method for calibrating scores between QA and line supervision. Or else the value of QA observations will be discounted in the minds of those who should benefit from them the most.



Trend analysis will show where you need to focus more attention during training or coaching. Here's a tip for saving time. If the scores from remote observations show an area where all or many of your reps need improvement, this points to a need for training. Pull your people off the phone and provide group instruction to remedy the deficiency. If, on the other hand, your reps are at vastly different levels of development, or need improvement in unique areas, this calls for one-on-one coaching sessions. Don't train a lot of people for one person's need.

Another distinction is that remote observations focus on the past. They reveal the current or recent state of performance. They tell you what is right and what is wrong. Side-by-side coaching, on the other hand, looks to the future. It allows you to focus on what can be better.





Finally, remote observations answer the question, "Do our people handle calls the way we expect them to?" Side-by-side observations answer a different question. They answer, "Can our people handle calls the way we expect them to?"

During remote observations you cannot distinguish between ability and willingness. If your reps *can* do better but *aren't* doing it, then you have a motivation problem, not a teaching one. How can you tell what the root cause is? Through side-by-side observing.

As you might expect, your reps will be at their best when you are sitting beside them. Nothing wrong with that... it's the best time to coach. What this means is, if your reps say or do something during a side-by-side call that is below your standards, it is because they cannot do it any better. They do not know how. They need to learn a better way. And, as coach, you are there to show them the better way.

This is where you earn your pay.

The chart below summarizes what I've described in this article. Remember, both types of observations are valuable. Each serves a distinct purpose. Avoid trying to use remote observations as a developmental tool or side-by-side observations for evaluation purposes. Use each for its best effect and you will see the performance of your reps skyrocket.

Coming next

This finishes Part I of this two-part series of articles on call center coaching. In Part II, we'll get into more specifics about how to coach when you are side-by-side with reps.

I'll concentrate next time on the "nuts and bolts" of call center coaching.

Remote	Side-by-Side
QA Purposes	Coaching purposes
Evaluative/Judgmental	Developmental
Quantitative	Qualitative
Trends	Single event
Group performance	Individual performance
Benefits management	Benefits rep
Uncovers training needs	Uncovers coaching needs
Feedback is over time	Feedback is per call
Covers entire call	Focuses on one part of call
Unknown	Known
Answers "Do they?"	Answers "Can they?"
Measures the past	Builds the future

About the author



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