Coaching Agents in the Moment

Tuesday, August 16, 2022

Welcome to today's webinar! We will begin shortly.

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Welcome to Today's Webinar!

Kevin Wallis

Director of Customer Enablement @ Balto

Webinar Host/Moderator

Today's session will be about **30 minutes** with time for **Q&A**.

Use the **Q&A button** on your screen to submit questions.

All registrants will receive the **video recording** and **slides** following the broadcast.

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Today's Speaker

Deidre Arnold
Director of Product @ Balto

Agenda

- Creating a Coaching Culture
- Impacts of a Coaching Culture
- How Balto Can Help
- Q&A

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Everyone wants to coach *"in the moment"* – so why is it so hard?

1. Culture
2. Moment identification
3. Direct communication
4. Timeliness

The problem with traditional coaching...

Balto surveyed 515 contact center managers
Here is what we learned...

5x
Managers **spend 5x more time** prepping than coaching

4.2 times
Managers report coaching agents **an average of 4.2 times** before they actually implement the new skill

10-14 hours
Managers commit **10-14 hours** to coaching before an agent implements a new skill

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# The problem with traditional coaching…

- Agents struggle to apply managers' coaching when it matters live on their calls.

- The shift to remote work took away managers' #1 coaching tool: walking the floor.

- Post-call coaching pulls agents off the phone and takes too much time from managers.

- Post-call coaching is too slow and too late.

- It is hard to know what calls to "live listen" to and managers can't listen to all calls.

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Creating a Coaching Culture

Creating a Coaching Culture

Characteristics of a Coaching Culture

- Coaching is based on best practices

- Coaching occurs regularly in the natural course of a manager's day

- Coaching applies to and includes everyone

- Coaching is not just focused on improvement opportunities, but also acknowledges and celebrates positive progression & outcomes

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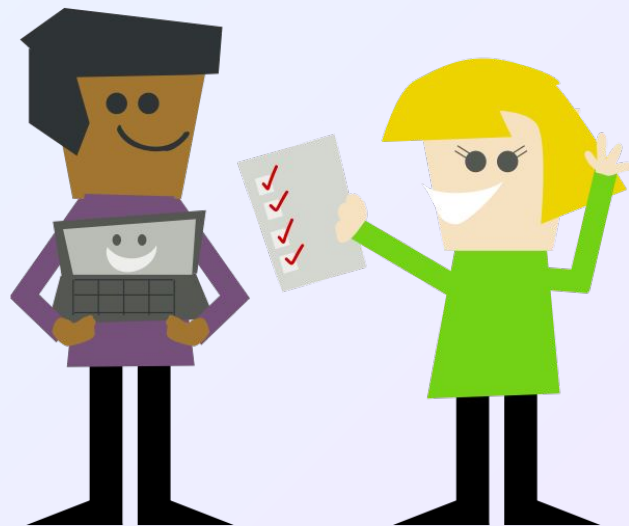
Creating a Coaching Culture
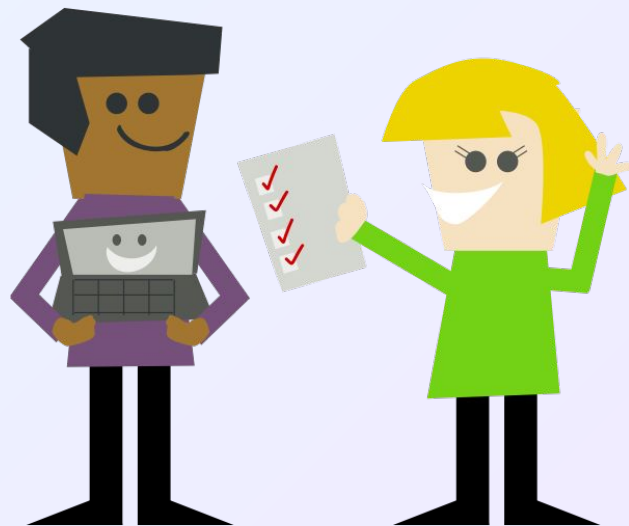
Key Benefits of a Coaching Culture

- Skills improvement at every level

- Increased employee engagement

- Pipeline growth and overall improvement in business results

- Increased productivity

- Reduced turnover

- Added competitive advantage

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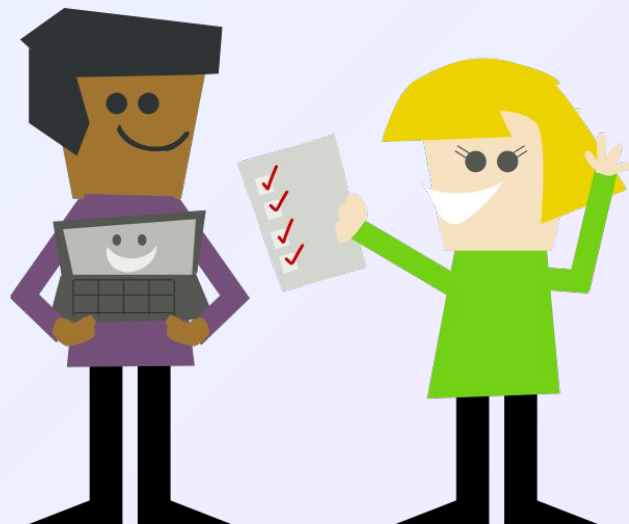
Creating a Coaching Culture

What Happens in a Coaching Culture?

- Team members are recognized and praised when they improve or go "above and beyond"

- Key behaviors and skills are reinforced to make it more likely that people continue doing them

- Feedback, guidance, recognition or direction isn't something that is reserved for a scheduled performance review or coaching session

- **The most effective coaches are the ones who coach and praise "in the moment"**

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Impacts of a Coaching Culture

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Impacts of a Coaching Culture

Performance Increases from Establishing a Coaching Culture
Source: Gallup study

7%

Up to **7% increase** in customer engagement

72%

Up to **72% decrease** in employee turnover

15%

Up to **15% increase** in employee engagement

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Reps need that extra coaching to truly become incredible agents - because with incredible agents, you can raise the quality of your call center and customer service.

Coaching is about building trust, motivating better work, and focusing on self-improvement.

Key goals of coaching should always be:

- Improve performance
- Build a better company culture
- Enhance the quality of the calls

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83% of high-performing call center agents attributed their performance to the quality of training they received.

Meaningful feedback focuses on:

- Ensuring clear communication
- Promoting empathy
- Emphasizing compliance
- Behavior based coaching vs. call based coaching

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Coaching: Behavior–Based vs. Call–Based

Behavior-based coaching focuses on one behavior and evaluates adherence to that behavior across many calls.

- Reps receive many instances of feedback around a specific behavior, which reinforces the lesson, drives home the need for it, and provides multiple examples of opportunities to better implement the behavior.
- With the consistency and precision provided by behavior-based coaching, managers spend less time to produce faster and better results.
- Because the coaching is predicated on the idea that there are key behaviors reps should be doing on the phone that will improve their performance, reps gain the focus and energy they need to drive up performance and increase conversion rates.

Call-based coaching looks at many behaviors within only one call.

- Managers spend most of their time listening to call recordings & depending on the size of the team, managers may be able to spend an hour's session each week with each rep to provide feedback and guidance.
- Managers will spend an inordinate amount of time & the rep will try to incorporate that feedback into future calls to produce only marginal performance improvements.
- Managers end up frustrated. Reps end up frustrated. Performance doesn't improve, and business results don't go up. This is the problem with call-based coaching.

Behavior-based coaching is more efficient, more accurate, and stays focused on what really matters for the success of each individual call center rep and the business as a whole.

Micro–Coaching as a Behavior–Based Coaching Approach

Micro-coaching involves providing individuals feedback throughout the workday to offer one-on-one coaching. It either be to give recognition to someone for delivering high-quality service. Or provide advice, tips, or strategies to respond effectively to difficult customer service interactions.

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Real Results from Real-Time Coaching

3000 Seat Health Insurance Company Impact on Conversion (supervisor level)

Top in Balto Chat	Med Conversion	Balto Chat
Supervisor 1	16.3	322
Supervisor 2	14.1	227
Supervisor 3	11.8	216
Supervisor 4	16.6	196
Average	14.7	240.25

Bottom in Balto Chat	Med Conversion	Balto Chat
Supervisor 11	8.7	1
Supervisor 12	14.5	1
Supervisor 13	12.5	1
Supervisor 14	10.3	1
Average	11.5	1

of coaching sessions from Company X

Balto enabled **2,289** micro-coaching opportunities through chat over a 2-week period.

Average # of coaching sessions from supervisor

High-performing supervisors completed an average of **240** micro-coaching sessions over a 2-week period.

Balto's sales impact

Balto's increased overall conversion rates by **27.8%** over a 2-week period!

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4 "Be"s of Effective Feedback

1. **Be** direct and constructive

2. **Be** solution-oriented

3. **Be** available and supportive

4. **Be** forward thinking to teach and coach toward the ideal

Characteristics of Effective Feedback

- Actionable feedback lets agents immediately incorporate the new customer service strategies and templates into their work.

- Ineffective feedback is vague and doesn't inform change.

- Agents are more likely to respond better simple advice that is easy to implement.

- When feedback is focused, it feels fair and authentic to employees because it's reflective of their contributions and within their ability to control.

"It's great that your call center can record calls and you can listen to them at a different time to provide feedback. *But, nothing replaces listening in to live calls and providing immediate feedback.*"

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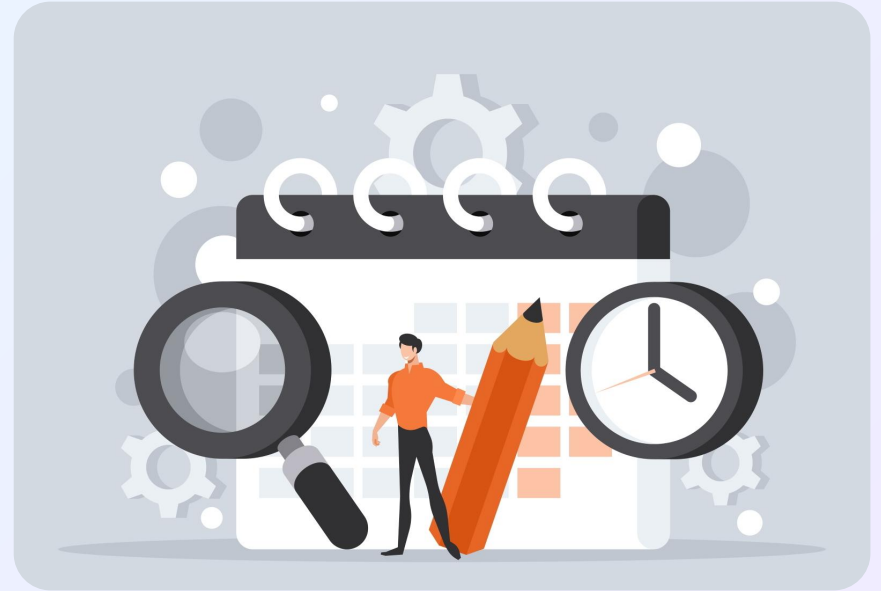
Every manager's goal:

Listen live to calls and give immediate feedback

- The downfall of providing feedback on recorded calls is that it is far from the current situation.

- By the time you are talking to them about the call, your agent has taken 50, 100, or more calls.

- When you coach a team member immediately after an interaction, it provides them with a tangible example to help improve their performance more effectively. *Coaching them DURING the interaction is an even MORE effective way reinforce the behavior.*

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Fast Feedback

The benefits of a culture of meaningful, fast feedback are numerous:

- Supports agility: Fast Feedback energizes employees and enables teams to make real-time, on-the-fly performance adjustments that create a competitive edge.

- Inspires excellence: Employees are 3.6 times more likely to strongly agree that they are motivated to do outstanding work when their manager provides daily (vs. annual) feedback.

- Retains talent: Employees today are looking for purpose-driven work and a manager who acknowledges and accelerates their progress.

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How Balto Can Help

Balto Real–Time Coaching

- Enables coaching in the moment for any agent at any time.

- Allows seamless live listening to calls with real-time live transcription.

- Empowers managers and supervisors to specify call event and behavior triggers to instantly alert them to coaching moments.

- Facilitates direct communication and in-call direction in a single interface.

Balto Real–Time Coaching

- Shows all call events and alert triggers for each call for each agent.

- Gives trend analysis over time to uncover longer term training opportunities and inputs into coaching plans.

- Quickly identifies top performing or underperforming agents based on behaviors and events that matter.

Q&A

Use the **Q&A button** on your screen to submit questions.

Thank you for joining us!

For more information, visit **balto.ai**

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