Coaching for the Win:

How AI Makes Contact Center Coaching More Effective

Clifton Butterfield, LLC

Balto

About Roy

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Takeaways

- Understand the commitment of time agent coaching represents

- Understand the costs associated with one-to-one agent coaching

- Understand the value represented by AI-assisted coaching and how that value can be realized by the contact center and the broader organization, ultimately improving Customer Experience

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Differences Between Training and Coaching

- Training is about developing a specific skill with the purpose of improvement.

- Coaching isn't about telling someone what to do, it's a long-term tool for facilitating learner-driven growth.

- The most effective learning strategies leverage both.

Source: Maestro Learning

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- Maestro Learning

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"Our employees are not amateurs. We pay them. So they are professionals. Ultimately, we want our employees to be just as great at their job as any star pro athlete. So we need to coach them daily." – Bill Quiseng

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Breaking News:
People Make Mistakes

- I forgot the right thing to say

- I got nervous

- I got bored by the repetition

- I wasn't trained on what to say

- The training wasn't effective ("Unsuccessful Approach")

Why Agents Make Mistakes

Gaps in Company Training (35%)

Human Error During Calls (65%)

Boredom 21%

Forgetfulness 24%

Unsuccessful approach 22%

Nervousness 21%

Lack of Training 12%
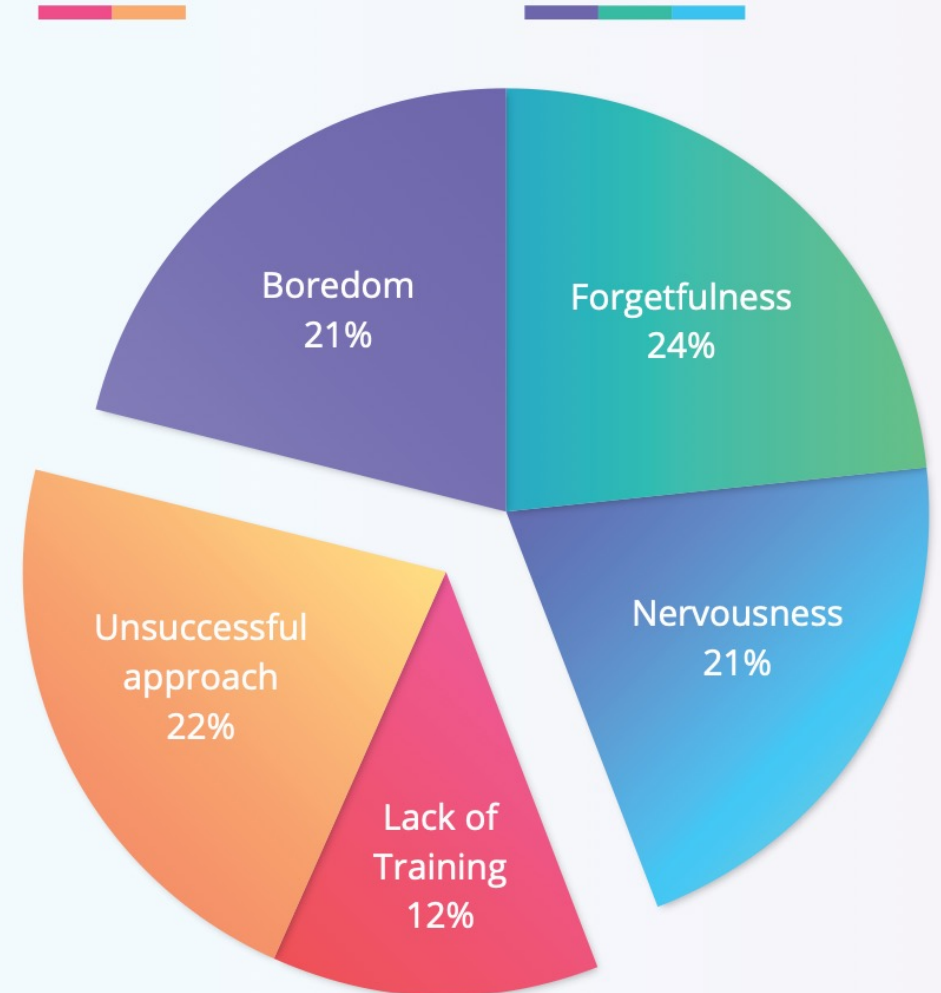
Source: Balto, *Understanding Mistakes During Calls*

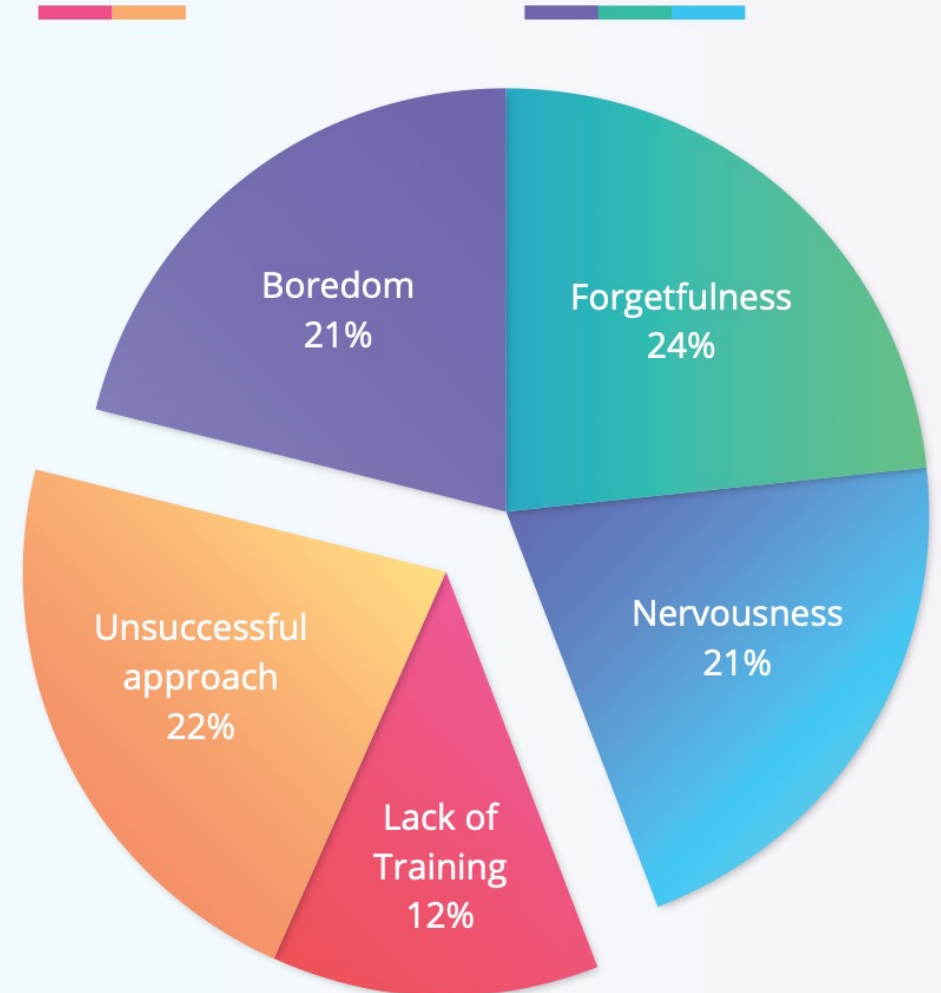# Breaking News:
People Make Mistakes

65% of mistakes are a result of human error

Identifying mistakes is the easy part. Eliminating them is the challenge.

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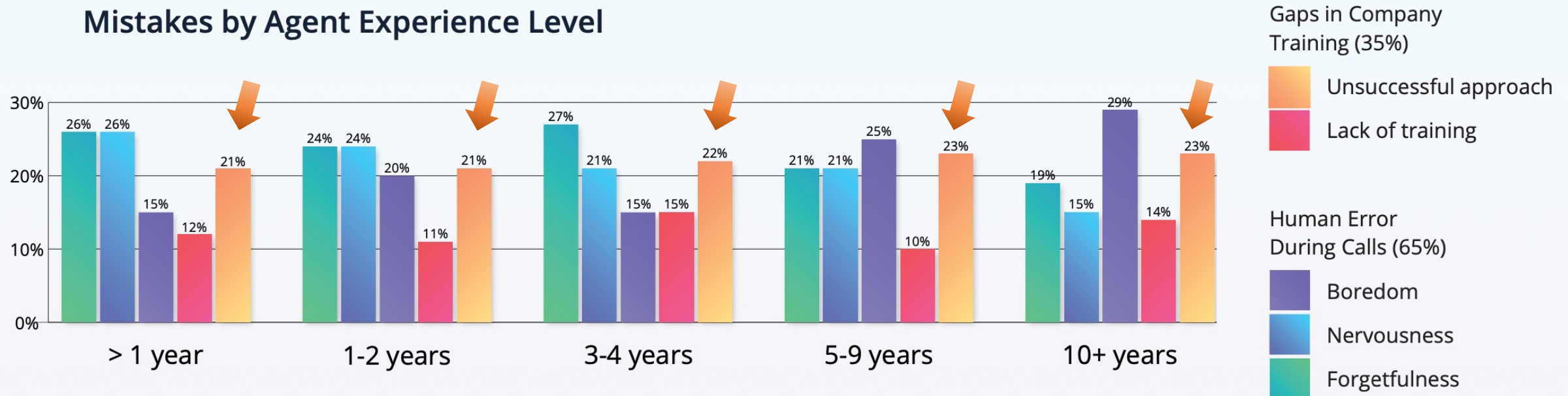Source: Balto, *Understanding Mistakes During Calls*

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It's Not the Training

- The most common reason for making a mistake: **Forgetting**

- The least common reason for making a mistake: Lack of training

It's Not a Lack of Training

Unsuccessful approach (training not effective) was cited by >20% of agents at all experience levels

Mistakes by Agent Experience Level

Source: Balto, *Understanding Mistakes During Calls*

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More Coaching?

Providing more coaching seems like the right thing to do, but:

Managers spend 5 times more time prepping than coaching. (2-3 hours for an average 34-minute coaching session) - Balto

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Time Commitment

- 2-3 prep hours plus 34 minutes of coaching (let's call it 2.5 hours) for each coaching session X number of coaching sessions
- The ratio of agents to supervisors averages 8.6 but ranges from 18.6 to 3.3 – MetricNet

8.6 agents X 2.5 hours = 21.5 hours for 1 round of coaching

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But agents need 4 coaching sessions before implementing a new skill!

21.5 hours X 4 = 86 hours

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Much of the prep for coaching comes from

listening to recorded calls – playing back the past.

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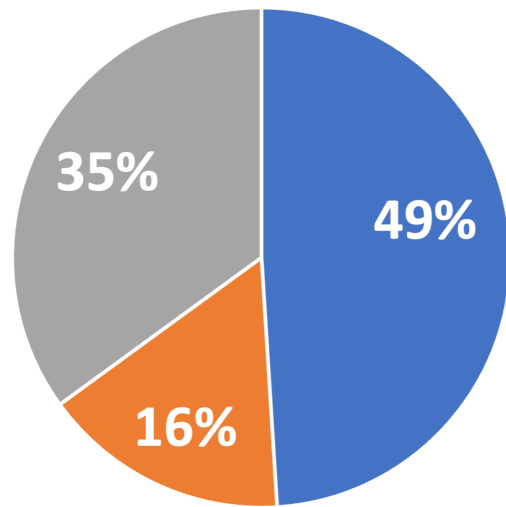
Organization Size and Coaching

Coaching sessions needed for agents to implement a skill:

- Organizations up to 250 agents: ~4 sessions

- Organizations 501-1000: ~6 sessions
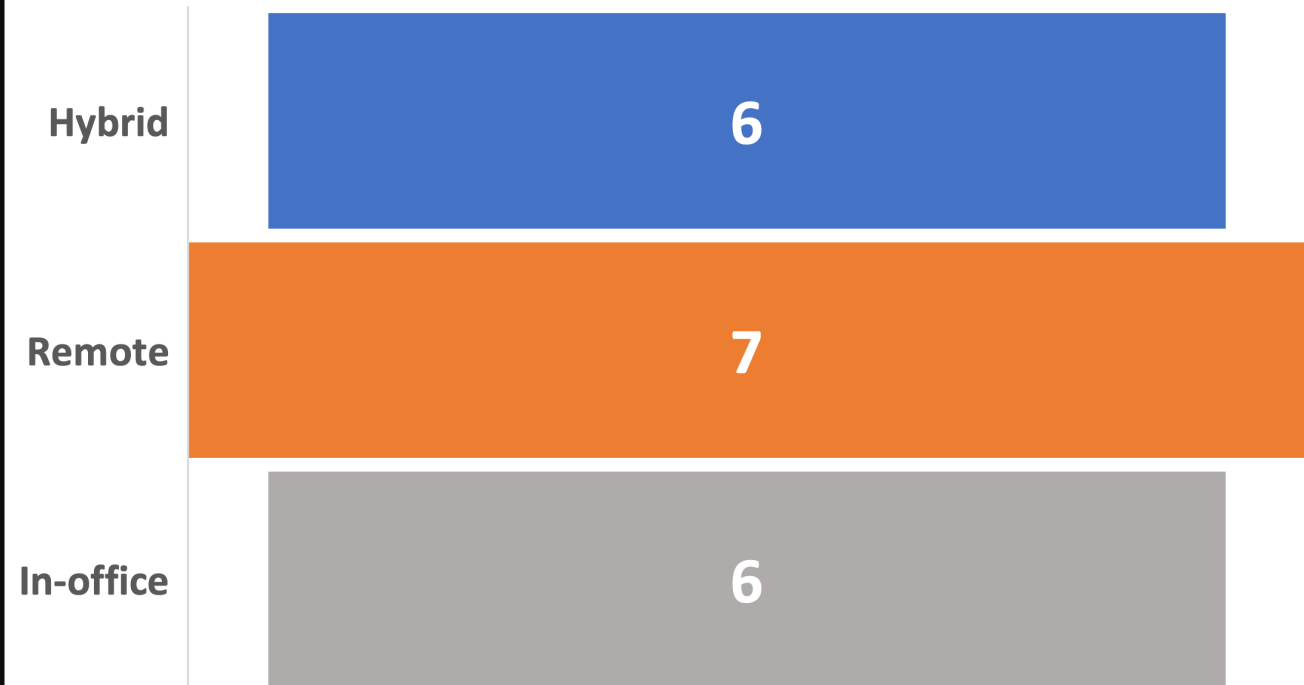
- Organizations over 1000 require fewer than 6

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Source: Balto Call Center Coaching Manager Survey

Location and Coaching

Work Location

- **Hybrid** 49%
- **Remote** 16%
- **In-office** 35%

Coaching Sessions per Month

Location	Sessions
Hybrid	6
Remote	7
In-office	6

Source: Balto Call Center Coaching Manager Survey

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Exhausted supervisor

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Agents' Point of View

Percentage of agents who found each method *helpful*

Bar chart values: 73%, 81%, 67%, 75%, 79%, 83%, 82%

Legend:
- Asking another agent for suggestions
- Company training
- Listening to call recordings
- Customer satisfaction (CSAT) surveys
- Nesting period
- 1-on-1 coaching
- QA scorecard

Source: Balto, *Understanding Mistakes During Calls*
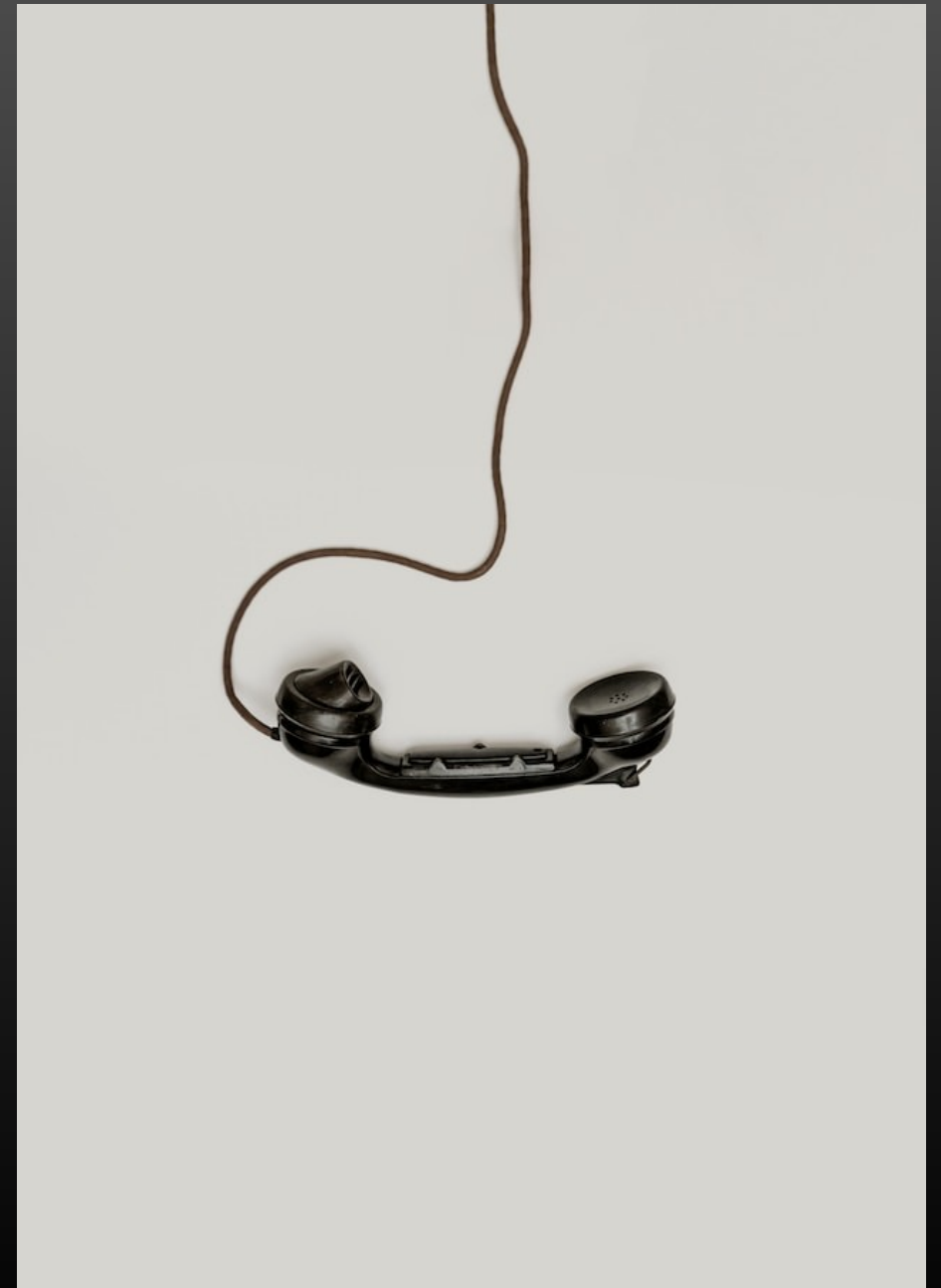
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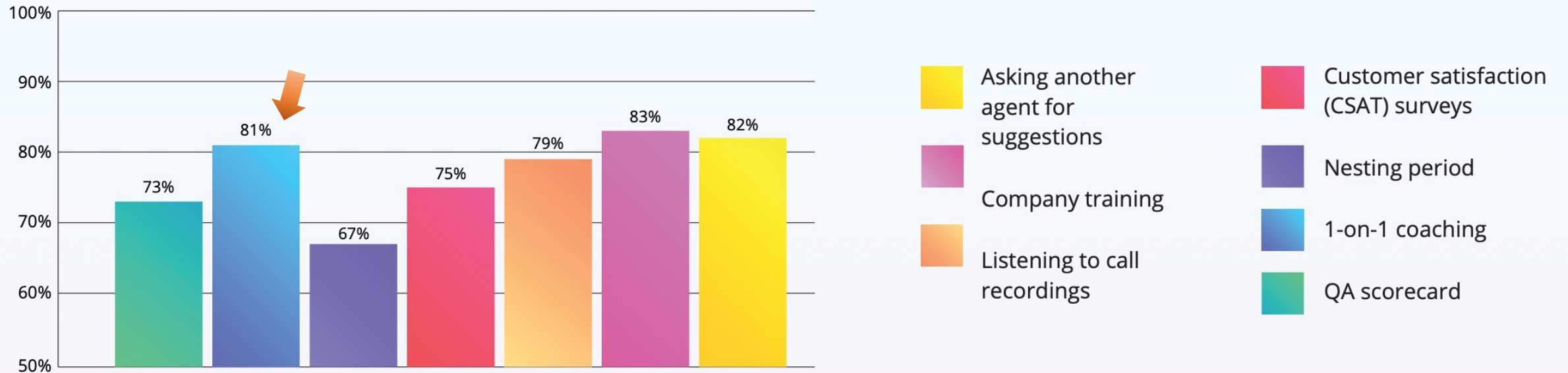
Time Is Money

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"Our research suggests that the average 500-agent call center in North America allocates around **$2 million** of staff time to coaching activities every year." - McKinsey

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Just a Reminder

86 coaching hours, $2 million

No contacts handled – no customers assisted.

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Compliance

- TCPA
- STIR/SHAKEN
- PCI DSS
- GDPR
- HIPAA
- <insert next acronym here>

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Advantages of AI Coaching

- Independent of location and time
- On-the-job accompaniment
- High effectiveness and efficiency

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Advantages of AI Coaching

	Monday	Tuesday	Wednesday
AI Coaching	• **Supervisors get alerts for coachable moments** • **Agents receive coaching in real-time, leading to instant behavior change**	• **Supervisors can spend more time training, coaching, and supporting agents**	• **Supervisors can spend more time training, coaching, and supporting agents**
Traditional Coaching	• Agents make mistakes on calls	• Monday's calls are scored and delivered to agents and supervisors	• Monday's calls are reviewed in a formal coaching session days after a call is over, leading to inefficient behavior change

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Advantages of AI Coaching

- Instant feedback results in 35% better learning adoption

- Guide calls in the moment, before the opportunity is lost

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Advantages of AI Coaching

- Coach in the moment, before a call is lost
- Identify coaching opportunities without listening to multiple calls per agent
- Reduce the number of coaching sessions needed to implement a new skill
- Reduce the time spent preparing for each coaching session
- Increase compliance
- Coach from anywhere, remote or not

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At the end of the day, improving CX is about your people.

- Forbes

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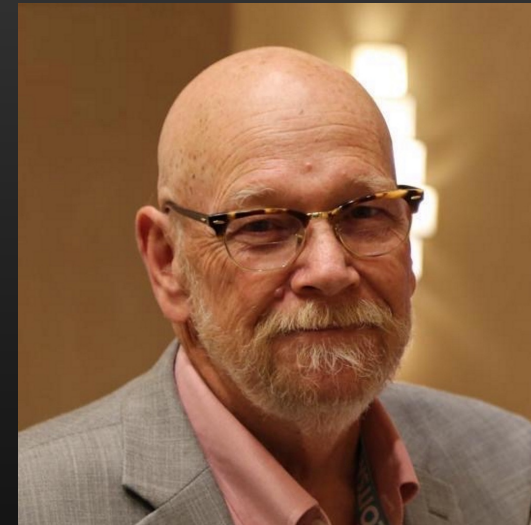
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