SO YOU THINK YOU CAN COACH!

Day 2

2-Part Masterclass for SOCAP Symposium 2017
In 2017, SOCAP launched a 3-part online course to help contact center team members at all levels explore best practices for great coaching. The content of the 3 webinars is described below:

Part 1 – “Small Win Coaching” and The 7 Roles Great Coaches Take
Part 2 – Working the “Small Win Coaching” Process Including Observation & Feedback
Part 3 – Overcoming Coaching Challenges to Create “Small Wins” Every Day

Goals for Day 2
The one thing we did not do by webinar was practice conducting 1-to-1 coach interventions needed to change behavior. This week, we get our chance with “So You think You Can Coach?”

If you have seen a TV competition show, then you have an inkling.

1. Identify coaching challenges you are concerned about, so we can address them.
2. Review a few key concepts from our online course “Small Win” Coaching.

3. Practice coaching in 3 common situations.

4. Talk about coaching methodology that really creates competence.

DEFINITION OF “SMALL WIN” COACHING
Find a behavior that is a pattern (or habit) worth spending time to correct. Then, follow a process of observation, feedback and rewards until that behavior has changed. Observable behavioral change is your “small win”. It is also your team member’s “win”. As a coach, nothing is more rewarding than seeing a team member achieve excellence with something that had been a struggle.

Why 1-2 behaviors? We are only human. It is nearly impossible to act on a list of corrections and succeed with all of them. Developing 1 skill or action at a time gets results faster than trying to master everything at once. You get something perfect, then move on to the next skill.
GREAT COACHES TAKE ON 7 ROLES, AS NEEDED

Great coaches build successful teams year after year in different climates with different challenges. They possess the skills to make team members choose to cooperate. Below, you will see that we have divided these skills into roles. Coaches take on different roles to address the developmental needs of individuals and teams. Master all the roles, as suited to your environment, and you will be the leader of the most successful team in your company.

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<thead>
<tr>
<th>7 Roles</th>
<th>Purpose &amp; Definitions</th>
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<tbody>
<tr>
<td>Colleague</td>
<td>Get to know the individuals on your team. Know their histories, current situations and goals. Find common ground beyond just the fact that you work in the same department. Develop trust relationships with sincere admiration. But, don’t get stuck in this role. You need to be trusted, but you have work to do. Your job is to help individuals grow and improve. Choose the next Role of Coach to master.</td>
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<td>Role Model</td>
<td>As the role model, the coach demonstrates corporate standards in every way. You must master the speaking skills, writing skills, systems skills, products, procedures and policies. You are not the 5-foot basketball coach with an excuse for not dunking the ball. You are the person who can show people how it’s done because you do it. No one can say a change in standards is impossible, if you are observed implementing it.</td>
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<td>Observer</td>
<td>Everyone knows they are watched at work. Contact centers are more honest about this than most other departments. Take on the Coach Role by actively observing each team member’s work. Take notes about what is said and done. See and hear how well each person complies to corporate standards for handling business situations. Observation is about collecting facts. See people's work clearly without making excuses. Observe 2-3 similar interactions to find the patterns behavior worth spending time to correct.</td>
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<td>Advisor</td>
<td>In the advisor role, the coach conducts interactive coaching sessions. Each coaching session results in a team member committing to adjusting his/her behavior as needed to master one or two of the company’s standards. Advising goes beyond giving written or verbal feedback. It may include role-play or a demonstration or the creation of a job aid. It always involves commitment from the team member to take action to change starting right now, and commitment from the coach to observe again within 24 hours to see the change and reward it.</td>
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<tr>
<td>Teacher</td>
<td>Teaching is essential to coaching. It goes beyond modeling the behavior. It includes conducting learning and development activities one-to-one or in small groups. Repeat training activities, re-introduce skills they may have forgotten, refresh standards by applying them to new challenges. Adapt what you teach and how you teach it to the needs of the individuals on your team.</td>
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<td>Disciplinarian/</td>
<td>Disciplinarian’s hold people accountable for meeting corporate standards. Rewarders give the appropriate credit, honors, or prizes to team members who have achieved pre-established goals. Rewards can be as simple and profound as a “thank you” note. Effective coaches balance discipline and rewards so there are no surprises. They hold everyone to the same standards. They demonstrate fairness and consistency.</td>
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<td>Rewarder</td>
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<td>Visionary</td>
<td>In the visionary role, the coach helps the team to see the future state of the department or group. Keeping in mind the current beliefs and concerns of your team members, you present a new vision and help people begin to aim at it. This may involve team meetings, inspirational posters, contests, etc. It may involve group activities or one-to-one activities. When the team catches a vision of success, they will act to achieve it.</td>
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DAY 2 MASTERCLASS CHALLENGES

Scenario 1: Which role of coach is best? What will you do?

Scenario 2: Describe 1 observation with concrete details.

Scenario 3: Follow your trainer’s instructions to address this coach challenge.
“THE ADVISOR ROLE”: FEEDBACK SKILLS

Positive Feedback and Corrective Feedback serve two different but important purposes.

- **Positive Feedback reinforces skills that already meet your standards.**
  - It shows that “My Coach”:
    - Was paying attention and noticed that a team member demonstrated mastery
    - Is impressed or proud enough to take the time to acknowledge the work
    - Wants the team member to be aware of what s/he did and to keep using the technique or strategy or behavior in the future

- **Positive Feedback must be:**
  - Sincere
  - Concrete or specific
  - Delivered in-person or in-writing (hand written notes are often posted and saved forever)
  - Delivered so that the team member knows exactly what to continue

- **Consider mastering a model for giving Positive Feedback that ensures team members know:**
  - Exactly what they did or said or wrote. **DESCRIBE** what you observed.
  - Why it was great and mattered to you, the company, the team, the agent. **EXPLAIN** why it was great.
  - They should continue to use this skill in order to reach a goal. **ENCOURAGE** more.

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**Recommended DEE feedback model is specific**

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<tr>
<th><strong>DESCRIBE</strong> (exactly what you observed with details)</th>
<th><strong>EXPLAIN</strong> (why it was great or important)</th>
<th><strong>ENCOURAGE</strong> (team member to continue using behavior to reach a goal)</th>
<th><strong>Generic Feedback does not help agents know what to continue.</strong></th>
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<tr>
<td>I just listened to your last 3 calls and noticed you said, “Thank you for being our customer. Your business means a lot to us,” at the end of all the calls with little personalizations. You elaborated to include a reference to 1 customer’s grandson, and 1 customer’s color choice, 1 customer’s plan to go out and buy our new kit.</td>
<td>You made the callers feel truly appreciated which is exactly what we are looking for. I know it was a challenge to break the habit of branding at the end of a call and start personalizing and you did it beautifully. I am so proud to have you on my team.</td>
<td>Please continue connecting to callers this way as you end your conversations. You are enhancing our brand image and helping our team get noticed. Thank you.</td>
<td>You did a great job with personalizing the end of those calls. Nice work.</td>
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CORRECTIVE FEEDBACK CREATES CHANGE.

It shows that “My Coach”:

- Was paying attention and noticed that a team member has a developmental opportunity
- Cares enough to take the time to help
- Wants the team member to know what to do to get a better result

Corrective Feedback must be:

- Concrete or specific
- Delivered so that the team member knows exactly what to change, how to change it and what will happen next to ensure his/her success.
- Delivered by a trusted coach who has responsibility for the team member’s success
- Diplomatic to preserve the team member’s dignity
- Delivered in a private conversation to preserve the team member’s privacy
- Followed later in the day by a reward after the behavior has changed (such as Positive Feedback)

Consider mastering a model for giving Corrective Feedback that creates a productive, interactive conversation (meeting of the minds):

- Exactly what they did or said or wrote. DESCRIBE what you observed.
- ASK team member to share thought process or intention.
- ASK team member to recall company standards or better ways to handle situation.
- DEMONSTRATE or DISCUSS the expected behavior including skill practice, the creation of cheat sheets/job aids.
- AGREEMENT from team member to take action to use discussed behavior and from coach to observe again right away (within 24 hours).

Begin with a statement/question pair that opens up conversation without criticizing. Focus on facts. After asking the question, be quiet. Allow team member to explain, elaborate, justify or perhaps even realize the error and start demonstrating what should have been said.

| 1-DESCRIBE exactly what you observed with details. | I just listened to your last 3 calls and noticed you said, “Thank you for calling Lindy’s,” at the end each time. |
| 2-ASK about the thought process, strategy or intent. | Can you help me understand what made you choose that phrase? |

Respond with empathy or an acknowledgement of team member’s thoughts, then ask the question that starts the correction portion of the conversation.

| 3-ASK about standards or ideas for a better approach. | I know it’s tricky to stop saying what you’ve said 30 times a day for 10 years. What did we learn in training about the new standards for personalizing the thank you at the end of calls? |
### Now, you may start helping team member understand what to do next time.

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<th>4-DISCUSS/Demonstrate about standards or ideas for a better approach.</th>
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<td>• Let’s take a look at the training notes you made.</td>
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<tr>
<td>• Let’s go back to your conversation with Lily Gompers. She mentioned she bought the silver beetle for her grandson. What is 1 way you could personalize your thanks for her?</td>
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<tr>
<td>• Looking at the standards, I might say, “Thank you so much, Ms Gompers for allowing me to replace your grandson’s silver beetle. Your business means a lot to us. Have a wonderful day.” Can you please give me another example?</td>
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<td>• Let’s go back to your conversation with Elan Moskowitz. He mentioned being a customer for 24 years. What is 1 way you could personalize your thanks for him?</td>
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### End with accountability for the coach and the team member. The effort may be wasted if you are not able to catch him/her succeeding and provide appropriate positive reinforcement.

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<th>5-AGREE about next steps to make sure this team member uses the feedback you took the time to provide.</th>
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<td>• I want to see you be successful. I am going to observe some of your calls during the rest of the day. As soon as I hear you use the new standards for personalizing the end of the call with thanks, I will be back at your desk to celebrate.</td>
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<td>• What cheat sheets or reminders will you post at your desk to make sure you concentrate on mastering this skill?</td>
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### BUILD A CULTURE OF PROFESSIONAL DEVELOPMENT

Walk around and notice the team members with lots of work-related job aids. Great coaches encourage cheat sheets, handwritten notes, pages torn out from training materials, photos and features lists for new products, infographics, etc.

If your environment demands “clean” cubicles or “no paper”, then you will have a much more difficult time coaching. Consider getting permission for team members to have notes for the 1 skill they are working on for the day or the week.

A useful reminder can be enough to help create the small win you need. As long as the reminder was selected or created by the team member during your coaching conversation, it will be an excellent tool.

**Examples:**

- **Habit to break/What to do instead.** “I do apologize.”/“I’m so sorry you had to call us about this. Please let me help you.”
- **Reminder.** Use code SH106 for complaints that involve itching. Ask, “Can you please clarify it the area was painful and itchy, or just painful?”
- **Template.** The 5 parts of an email.
- **“Today’s Small Win Card”**. My coach is listening for this disarming response to an upset caller, “I hear how upset you are. Can you please tell me more about what happened?”