



Customer Service Coaching Plan:

9 Tips for How to Coach
More Successful Agents

Introduction



It may seem simple, but the reality is that great customer service experiences start with great customer service agents. When a customer calls, emails, or chats in with an issue, your agent has the opportunity to make or break their perception of your brand with how they handle the situation.

Even if they can't remedy the issue, the way they display empathy, understanding, and show the customer that their business is valuable all impact whether or not the customer has a positive experience and view of your brand.

But if your agents aren't given the proper resources, tools, and guidance, with goals and skills that are measured for success, you run the risk of delivering less than stellar customer experiences.

Whether your team is made up of seasoned support professionals or some who are new to the world of CX and still learning the ropes, it's incredibly important that you have a consistent, ongoing form of coaching and communication to help them perform at their best.

First, it's important to make a distinction between training and coaching.

- **Customer service training** refers to sharing tactical knowledge on how systems operate, like how to close tickets in your team's tool of choice or utilize the company Knowledge Base.
- **Customer service coaching** refers to the practice of ongoing communication between the agent and their manager to hone in on how to improve on specific skills, achieve specific goals, and develop their craft so they can handle even the most difficult customer interactions.

Having a coaching plan in place for your agents ensures that your team is set up to be successful from day one, after onboarding and training is completed and they're interacting with your customers, all the way until their tenure with your business ends.

In this ebook, we'll walk through 9 core tips for how to coach more successful agents that you can start implementing today to help your team perform better than ever. Use the tips outlined below to create an actionable customer service coaching plan that will maximize the impact and value of your overall coaching program.

Customer Service Coaching Plan

Coaching your Service Team Strategically

It's not enough to just have scheduled time with each team member if that time is unstructured, unplanned, and ultimately unproductive. When it comes to coaching your agents for success, you need to be strategic, methodical, and organized.

Tip 1: Make coaching sessions 1:1, always.



Many traditional organizations tend to take the one-size-fits-all approach to coaching, but doing so is actually doing a disservice to agents at both ends of the spectrum.

On one hand, your best agents may find the sessions boring, irrelevant to them, or even patronizing. On the other, your agents who are struggling may become overwhelmed and tune out your message completely.

And while the one-size-fits-all approach may be easier to execute, it will be detrimental to the overall success of your team. Instead, it's important to tailor your coaching sessions to each agents' individual needs.

If someone isn't performing at your team's standards, for example, you may want to focus your coaching on the tactical aspects of their job, like response time on tickets or their behavior when interacting with customers.

On the flip side, your best performers likely don't need to run through how to handle basic ticket issues and FAQs that come up with your customers. Instead, these coaching sessions should be focused on how they can go from good to great, ways they can continue to grow in their career, and discuss any new skill sets or opportunities they would like to explore.

In a 1:1 coaching session, managers can take the time to focus on that agent's specific needs and concerns, without judgement or comparison from the rest of the team. Plus, 1:1 meetings mean that agents will feel more comfortable opening up, and will ultimately come away feeling better equipped and more valued by their manager, their team, and their company.

Tip 2: Start off on the right foot.



Coaching isn't about passing judgment or calling out inadequacies and failures; its purpose is to encourage agents and help them achieve their personal best. During each coaching session, make sure you start off on the right foot. You can do this in three main ways:

- 1. Highlighting the positive.** No one wants to walk into a 1:1 with their manager and immediately start discussing something they messed up or an area of their work where they're lacking. Instead, as a manager, put your agent at ease by highlighting the work they're doing and any cases they've handled particularly well since you last spoke.
- 2. Asking open-ended questions.** Don't talk at your agent; instead, create an open dialogue about their work and give them the opportunity to explain their thought processes, provide context, and talk through potential resolutions or next steps.
- 3. Focusing on the behavior (not the person).** This one is pivotal for managers and team leads to keep in mind. When planning your 1:1s, keep in mind that your agent may have had a bad day or week, especially if their performance is usually high. Focus on the concrete things they can do to better their work, and don't make any critique about the agent themselves.

Tip 3: Have a specific purpose for each customer service coaching session.



The law of diminishing returns applies here. The more you try to pack into a coaching session, the less the agent will get out of it. If you try to focus on maintaining call quality, plus their ability to collaborate with other members of the team, on top of XYZ, it's information overload.

Instead, limit your discussion to a single aspect of performance.

Each 1:1, highlight one focus area to discuss (bonus points if you give the agent a head's up so they can prepare themselves for the conversation), and keep your conversation only on that topic.

Doing so will not only help you and the agent prioritize the most important areas of improvement first, but will also give you a framework for tracking and measuring real progress in those areas over time.

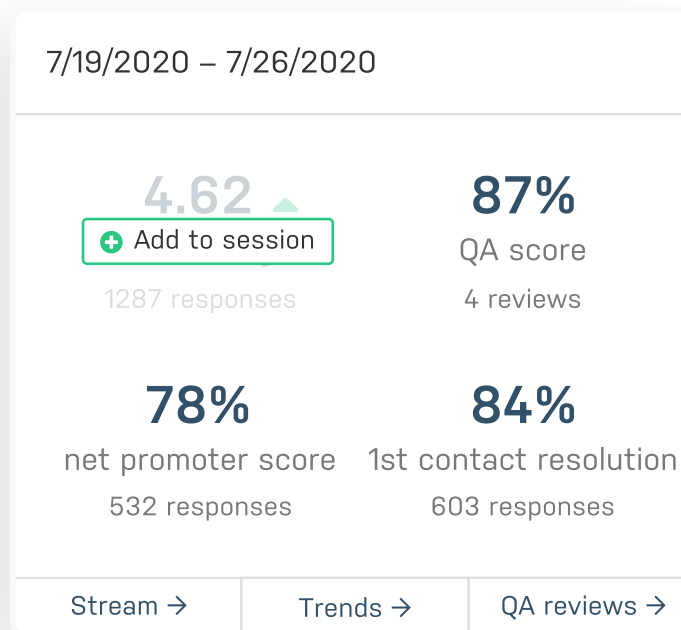
Tip 4: Use firsthand, specific, timely data and put things in context.



At Stella Connect, we believe the best and most effective coaching is coaching that is based on context.

With Stella Connect 1:1s, team leads have the ability to bring real-time, agent-level metrics directly into their 1:1 conversations.

You'll be able to get a quick view of overall agent performance in relation to the metrics that matter most to your team, like CSAT or FCR, and then drill down deeper into specific customer interactions without ever leaving the 1:1 environment.



Plus, when you're coaching an agent, you want to make sure you're coaching on solid ground.

Anyone with access to Stella Connect, including agents, can save pieces of feedback or QA reviews for discussion in 1:1s, which can then easily be added to 1:1 sessions with their team lead for coaching and recognition.

This is not only a great way for agents to proactively contribute to their growth and improvement, but also serves to keep team leads in the loop on recent successes or misses during customer interactions.

By basing the session on a call you listened to, customer feedback, or other performance data tied to a specific interaction, the session immediately becomes more meaningful and more impactful.

Tip 5: Micro-coach them throughout the day.



While having set time each week or every other week to talk about performance, a strict 1:1 schedule may not be the best fit for every single agent or team lead.

That's why we recommend taking your coaching strategy a step further and implementing micro-coaching.

Micro-coaching, or coaching in short bursts, is one of the most effective forms of customer service coaching. In these impromptu sessions, managers pull agents aside to discuss specific, real-time performance data, making the session both personal and actionable for the agent.

You can use this when something like a 1-star review comes in to quickly debrief the situation, or after a QA review of the agent's most recent call where you want to point out an issue with how they presented a company policy.

Use micro-coaching to congratulate top performers, strengthen mid-performers' service delivery, and mentor agents who are struggling.

Considering Your Agent's Point of View

Like we mentioned earlier, it's important to ensure that you're keeping the focus of your coaching sessions on behavior, rather than on the agent themselves. But that doesn't mean overlooking the agent as an individual in any way.

Rather, keeping a pulse on how your agent is performing (which can inform how they're likely going to respond to your feedback), and how they're going to create actionable change in their behavior as a result, is another critical part of coaching.

Tip 6: Give the agent the floor.



We mentioned this tip earlier, but it bears repeating: don't lecture, listen.

Coaching should be a dialogue between an agent and their manager or team lead. Your agents should be just as invested in their own growth, progress, and success as you are. Encourage agents to assess their own performance and identify any barriers to improvement (time, additional training, tools, etc.).

If you're using Stella Connect 1:1s, ask them to select one interaction per session to review and come prepared to discuss how they think they performed.

Feedback should always come in two forms: motivational – this is about praising what went well and is intended to acknowledge success and build confidence; and developmental – this is about explaining what could have been done differently or better and is intended to build competence.”



Agnieszka Anna Jozwiak

CX & UX Consultant, Business Integrity Manager at Facebook

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In addition, as a general rule of thumb for managers, try not to be too prescriptive if you can help it. Ask them for their ideas on how to correct the problem(s), challenge their ways of thinking, and help them get on track to keep moving in the right direction.

Tip 7: Show confidence in the agent.



You know your agents are capable of correcting performance issues and are eager to improve. But you need to show this in the way you coach.

Setting a collaborative tone will lead to better outcomes and pave the way for more productive customer service coaching sessions in the future. Show your agents that you understand how much work they do, that you see the thought and care they bring to each interaction, and that you recognize how tough it is to be on the frontline of a business.

Build them up when you have the opportunities to do so, and make it clear that you trust them to bring their A-game each and every day.

Tip 8: Use the GROW model to develop goals and action plans.



The GROW model of coaching was developed during the 1980s by three business coaches named Graham Alexander, Alan Fine, and Sir John Whitmore¹. This model seeks to simplify the complexity of coaching (and being coached) by helping people clearly articulate their aspirations and plans for the future. GROW stands for:

G

Goal:

What do you want to achieve?

R

Reality:

Where are you now?

O

Options:

What could you do?

W

Will:

What will you do?

The GROW model puts the power back in the users hands, and gives them the tools to think about a complex issue or situation in four key steps.

When it comes to customer service coaching, the GROW model is an incredibly powerful framework to have at your disposal. All too often, agents are measured purely based on corporate-decided metrics.

With the GROW model, you can have meaningful conversations about what your agent wants to achieve, like a certain CSAT or QA score, and help them discover the things they need to do to make those goals a reality.

By focusing on agents' personal aspirations (not just high-level corporate objectives), you'll not only serve your brand's strategic interests, but also challenge and inspire your team.

¹ https://www.mindtools.com/pages/article/newLDR_89.htm

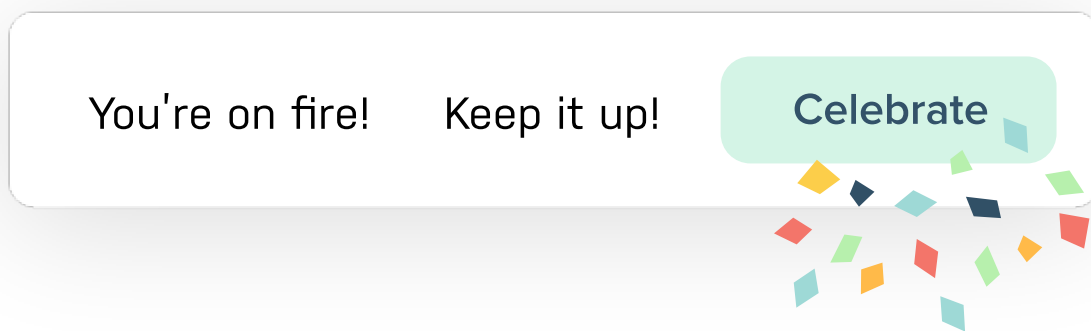
Tip 9: End on a positive note.



Everyone loves to feel appreciated at work, and we all know that working on the frontline of any business is not without its fair share of challenges and tough days.

Use your coaching and 1:1 time to really show your appreciation for the hard work your agents do every day to represent the brand.

With Stella Connect 1:1s, you can easily give kudos to your agents on a job well done. Kudos are your opportunity to shout out wins and accomplishments, and an opportunity to say thank you to your team members for their hard work.



Using this feature will help you celebrate your teams' successes, knowledge or expertise, effort, or prowess for demonstrating your company's values, and will serve to remind them of their essential role and their value to the team and the company.

With some team members still working from home, the ability to provide positive reinforcement is an asset to team leaders looking to boost morale and ensure their agents feel supported and appreciated.

Why You Need a Customer Service Coaching Solution



According to data from Indeed, there are 17 top customer service skills that are pivotal for success in a customer-facing role². Those skills are:

- 1.** Active listening
- 2.** Adaptability
- 3.** Attentiveness
- 4.** Conflict resolution
- 5.** Creativity
- 6.** Decision-making
- 7.** Dependability
- 8.** Effective communication
- 9.** Empathy
- 10.** Friendliness
- 11.** Knowledge of your product or service
- 12.** Open-mindedness
- 13.** Patience
- 14.** Quick thinking
- 15.** Reading physical and emotional cues
- 16.** Responsiveness
- 17.** Timeliness

Now, you may be thinking, this is a great list! But nearly all of these are soft skills - skills that are much harder to track, quantify, and measure success against.

How can you report on improvements in patience, for example, or monitor how empathetic your agents are being during their customer interactions?

With Stella Connect, you can do just that.

Stella Connect captures customer feedback on agent performance after every service interaction, and enables businesses to customize their follow-up to measure against the metrics and results that matter the most to their team.

And with response rates of up to 50% and real-time feedback streams, team leaders can easily identify and act on meaningful coaching opportunities with their agents. We help team leads and managers take the guesswork out of how to structure or plan your next coaching session.

² <https://www.indeed.com/career-advice/resumes-cover-letters/customer-service-skills>

Easily measure agent performance based on soft skills like professionalism, empathy, and clarity, then take those learnings and bring them into 1:1s for more productive, impactful conversations.

Don't wait until an interaction is long forgotten. Provide real-time, actionable coaching with Stella Connect.

“With Stella Connect, supervisors can readily identify coaching opportunities throughout the day, focus on specific ‘Areas of Improvement’ in QA reviews, and provide timely, actionable coaching where it’s needed most.”



Graham Jones

Help Desk and Operations Manager

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Perform like the top high-growth CX teams. Learn how Stella Connect can help you provide top quality customer service.

Stella Connect by Medallia is the customer feedback and quality management platform built specifically for customer experience teams. Our intuitive platform makes it easy to harness agent-level customer feedback and deliver high impact coaching and QA programs, driving agent engagement and customer satisfaction.

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