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LEARNER GUIDE

Provide Coaching To Personnel Within A Contact Centre

Unit standard 10327

Level 4 Credits 10

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UNIT STANDARD 10327

Unit Standard Title

Provide coaching to personnel within a Contact Centre

Unit Standard ID

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NQF Level

4

Credits

10

Purpose

This unit standard forms part of the qualification, National Certificate in Contact Centre Operations NQF Level 4. Learners working towards this unit standard will be learning towards the full qualification, or will be working within a Contact Centre environment, where the acquisition of competence against this standard will add value to learner's job. This unit standard is intended to enhance the provision of intermediate level service within the Contact Centre industry.

Unit standard range

This standard applies to Contact Centres that are in-bound and/or out-bound within a commercial or emergency context and will include appropriate subject matter in the area in which the learner chooses to operate.

Learning Assumed To Be In Place And Recognition Of Prior Learning

- ✓ Learners accessing this unit standard or qualification will have demonstrated competency against unit standards in Contact Centres at NQF Level 2 or equivalent.
- ✓ Learners are expected to have demonstrated competency in language, numeracy, literacy and communication at NQF Level 4 or equivalent.

Specific Outcomes and Assessment Criteria

Specific Outcome 1: Identify development areas within a Contact Centre context.

Assessment Criteria

1. A needs analysis is conducted according to company specific procedures. Assessment Criterion Range: Formal or informal

2. Development areas identified are based on an assessment against performance standards.

3. Development areas are clearly defined and are accurately translated into specific coaching criteria.

Specific Outcome 2: Select coaching techniques and methodology.

Assessment Criteria

1. Coaching techniques and methodologies are appropriately selected based on correct identification of development areas.

2. Coaching techniques and methodologies are appropriate to learners' NQF entry levels.

3. Coaching techniques and methodologies are consistent with performance requirements.

Specific Outcome 3: Coach Contact Centre personnel.

Assessment Criteria

1. Appropriate support is provided.

2. Call centre specific coaching principles are adhered to - informal and formal coaching methods are used.

3. Relevant, objective assessments are conducted.

4. Coaching content is consistent with specific development areas.

5. Company defined coaching targets and objectives are reached.

6. Reports are provided to learners and management. Assessment Criterion Range: Include but not limited to work the floor, coaching from statistics and/or call centre reports. Formal coaching: One-on-one through listening to live calls, taped calls.

Unit Standard Essential Embedded Knowledge

- ✓ A comprehensive understanding of methods and techniques to develop understanding by others.
- ✓ An in-depth knowledge of formal and informal coaching methodologies in a Contact Centre.
- ✓ A broad understanding of communication techniques within a coaching context.
- ✓ A general understanding of people's behaviours.

Critical Cross-field Outcomes (CCFO)

- ✓ Identify and solve performance problems in which coaching responses display appropriate critical and creative thinking.
- ✓ Work effectively with others as a member of a coaching or supervisory team.
- ✓ Collect, analyse, organise and critically evaluate information related to the identification of areas of coaching required.
- ✓ Communicate effectively with learners during the process of coaching.
- ✓ n order to contribute to the full personal development of each learner and the social and economic development of society at large, it must be the intention underlying any programme of learning to make an individual aware of the importance of: reflecting on and exploring a variety of strategies to learn more effectively to enhance coaching efforts.

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DEVELOPMENT AREAS

Specific Outcome 1

Identify development areas within a Contact Centre context.

Assessment criteria

- ✓ A needs analysis is conducted according to company specific procedures. Assessment Criterion Range: Formal or informal
- ✓ Development areas identified are based on an assessment against performance standards.
- ✓ Development areas are clearly defined and are accurately translated into specific coaching criteria.

Needs Analysis

A training needs analysis is required to define the NEED for training; an investment in the employee or non-employed person that is applying for training.

This training needs analysis should therefore PROVE the need for training, focusing on the individual and his/her needs starting with entry levels and completing (where possible) on-the-job assessment, remembering that the final training will be outcomes based training. It is therefore the outcomes that are important and against which the potential learner's needs are to be determined.

A needs analysis will assist the coach in identifying where there are training needs and where not. A needs analysis can be formal or informal. A formal needs analysis would be in the form of a performance review which usually takes place every six months and are documented. This usually occurs when there are serious performance issues and training needs to be dealt with. An informal needs analysis usually takes place when a supervisor and employee have a casual one-to-one conversation in order to identify possible training needs.

In order to effectively identify the needs of the learner, you have to be aware that there are three levels of needs assessment:

- ✓ organisational analysis,
- ✓ task analysis and
- ✓ individual analysis.

Organisational analysis does not apply to this programme, so we will briefly discuss task analysis as an introduction to individual analysis.

Task analysis

Task analysis provides data about a job or a group of jobs and the knowledge, skills, attitudes and abilities needed to achieve optimum performance.

There are a variety of sources for collecting data for a task analysis:

- ✓ Job description-- A narrative statement of the major activities involved in performing the job and the conditions under which these activities are performed. If an accurate job description is not available or is out of date, one should be prepared using job analysis techniques.
- ✓ KSA analysis-- A more detailed list of specified tasks for each job including Knowledge, Skills, Attitudes and Abilities required of incumbents.
- ✓ Performance standards-- Objectives of the tasks of the job and the standards by which they will be judged. This is needed to identify performance discrepancies.
- ✓ Observe the job/sample the work.
- ✓ Perform the job.
- ✓ Job inventory questionnaire-- Evaluate tasks in terms of importance and time spent performing.
- ✓ Review literature about the job-- Research the "best practices" from other companies, review professional journals.
- ✓ Ask questions about the job-- Of the incumbents, of the supervisor, of upper management.
- ✓ Analysis of operating problems-- Down time, waste, repairs, late deliveries, quality control.

Individual analysis

Once you have completed the organisational and task analysis, you should know what an employee should know in order to do the job well. You should also know how the job should be done. Now you have to conduct an individual analysis in order to determine what knowledge and skills the employee needs in order to:

- ✓ Do his/her current job
- ✓ Be promoted to the next level
- ✓ Achieve his/her career goals

Sources of information available for an individual analysis include:

- ✓ Performance evaluation -- Identifies weaknesses and areas of improvement.
- ✓ Performance problems -- Productivity, absenteeism or tardiness, accidents, grievances, waste, product quality, down time, repairs, equipment utilization, customer complaints.
- ✓ Observation -- Observe both behaviour and the results of the behaviour.
- ✓ Work samples -- Observe products generated.
- ✓ Interviews -- Talk to manager, supervisor and employee. Ask employee about what he/she believes he/she needs to learn.
- ✓ Questionnaires -- Written form of the interview, tests, must measure job-related qualities such as job knowledge and skills.
- ✓ Attitude surveys -- Measures morale, motivation, satisfaction.
- ✓ Checklists or training progress charts -- Up-to-date listing of current skills.

You will also have to compare the career goals of the individual will the analysis of the organisation – will the employee be able to fulfil his career goals in the organisation and what knowledge and skills will he need?

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Training needs VS performance problems

In South Africa today a training needs analysis has to be done with inputs from the workers and it should fit in with their career paths in the organisation as the focus is on lifelong learning. The managers of the various departments and sections must also be consulted since they have to release the employees for the training. In some cases the shop stewards must also be involved. Their primary function in the training process is to ensure that everyone with a training need is given the opportunity to attend training.

The first step is to look at the job descriptions of the employees to determine what the job requires the employees to do.

The next step is to determine the skills and knowledge that the employee has so that the shortfall in knowledge and skills can be addressed by the training intervention. It does not make sense to send a person who has already been working on computers for a number of years to a training intervention that is intended for someone with little or no knowledge of computers. This is called a skills audit.

Determining the individual training need has to be done with the cooperation of the employee, his/her manager and the shop steward.

The two most useful questions to the supervisor are:

- ✓ What is the employee doing that s/he should not be doing?
- ✓ What is the employee not doing that s/he should be doing?

A question that can be added to the employee's questionnaire is:

- ✓ What barriers prevent the employee from performing?

This focuses the responder to the interview or survey towards visible behaviour.

Some managers and employees will find it difficult to explain what the problem is – besides, manager do not want to admit to having problems. Some managers will tell you in detail what their employees are not doing, but difficult to explain what they should be doing. In this case, you can use the following matrix to identify their expectations:

Action **What the employee should be doing**	**Object** **What the employee does it to**	**How well? How often? How much?**
Type	Letters and reports	With all errors corrected
Add 14%	Value Added Tax (VAT)	To all purchases without error
Restock	All shelves	When no customers are in the department
Serve	Customers	Whenever there are customers present
Refrain	From chatting	With other employees if customers are anywhere in the department

A note of caution here: people can underestimate or overestimate their knowledge of their work. If we look at computer training, you can, for example, find someone who has only played games on the computer who will tell you that s/he has vast knowledge of computers, while someone else who has worked extensively on computers and who realises that his/her knowledge in the overall realm of computers is limited, who will state that they have no or little knowledge.

It would therefore be advisable to do spot checks through interviews, or to check with the manager about the person's level of knowledge.

Make sure that you ask open and directive questions in your questionnaire. Also give the respondents an opportunity to state their own ideas. Leave blank lines on the questionnaires – you might get some interesting information.

Needs assessment techniques

Several basic Needs Assessment techniques include:

- ✓ Direct observation
- ✓ Questionnaires
- ✓ Consultation with persons in key positions, and/or with specific knowledge
- ✓ Review of relevant literature
- ✓ Interviews
- ✓ Focus groups
- ✓ Tests
- ✓ Records & report studies
- ✓ Work samples

There are a number of practical methods you can use to gather data about employees' performance. Each works well in given circumstances; therefore, you must determine which be the best for you. None of these methods can stand alone.

Always use at least two, if for no other reason than to validate your findings.

One of those you choose should always be observation.

Observation

In this approach, an employee's performance itself is you source of information. You evaluate a worker's performance through first-hand observation and analysis. This is best done by watching the worker and playing the role of non-participating observer. This means that you watch and listen and evaluate what you see and hear, but do not get involved in his work process in any way.

To make this activity more productive, use a checklist to remind you of what to look for and take notes.

The objective during observations is to identify both

- ✓ the strengths to build on and
- ✓ the deficiencies (weaknesses) to overcome.

A key advantage of using direct observation in the needs analysis is that you gain first-hand knowledge and understanding of the job being performed and the strengths and weaknesses of the relevant worker.

Interviews

The use of interviews in conducting the needs analysis is strongly recommended.

The prime value of an interview is that it ensures the same types of data from all sources. This allows you to find out whether a piece of information is one person's opinion, or part of a widespread perception. Since the interview guide forces you to ask each worker a number of predetermined questions, you must select those questions that are essential to what you are trying to learn.

Interviews allow you to meet employees face to face to discuss their impressions of performance. Because you are in conversation with workers, you can explore their responses in depth. You can ask or clarification of comments and for examples of what they mean. In this way, you obtain a full understanding of their performance deficiencies.

You also gain these benefits through interviewing :

1. You build credibility with your interviewees by asking intelligent questions and listening well to their answers

2. You obtain employees' personal involvement and commitment to your efforts

3. You establish personal relationships with potential learners who are important to your success as a needs analyst and trainer

Questionnaires

A questionnaire is a sort of interview on paper. You create your own questionnaire by writing down all the questions you want employees to answer for you. Then you send it to them and await their responses.

The key advantage of a questionnaire is that you can include every person from whom you want input. Employees can complete the questionnaire when and where they choose. You need not travel and spend time with all respondents. Every employee is asked the identical questions, and consequently data is very easy to compile and analyse.

Questionnaires can be useful in obtaining a ` big picture ' of what a large number of employees think while allowing everyone to feel that they have had an opportunity to participate in the needs analysis process.

Job Descriptions

Before establishing a job description, a job analysis must be made. This job analysis involves a thorough study of all responsibilities of the relevant job. It is company-wide in scope and should be detailed to such a degree that those conducting the training can use the job analysis as a yardstick for their course content. After the job analysis phase has been completed, the writing of job description and needs analysis is a relatively simple task. When an employee's job description has been defined, the trainer can easily tailor his training curriculum to a very close proximity of what will be expected of the employees.

The Difficulty Analysis

The Job Analysis will focus attention on detailing the numerous duties that a worker must perform. On the other hand, the Difficulty Analysis establishes which of the duties cause the employee the greatest amount of troubles and how this trouble can be reduced through better training.

A good Difficulty Analysis offers many advantages. For example ....

- ✓ It enables a needs analyst to weigh certain aspects of the training in relationship to the expected difficulty that the worker will face in coping with those duties.
- ✓ A well thought out Difficulty Analysis will provide the training program with an abundance of role-playing material and situations.

Problem solving conference

Another time-tested technique for gathering needs analysis material from employees is to conduct periodic problem solving conferences which may take the form of or be part of a plan for a new product, task or technology, or tied in with a training program

It is always helpful to use an outside consultant to moderate such sessions. This outside sponsorship has a tendency of letting the workers express their feelings about his organisation, and the session can then be geared to training needs. The current problems will evolve that represent potential areas for training.

Appraisal reviews

During the periodic counselling performance interview, an employee should be questioned regarding the duties and training of a worker. Comments given during the appraisal interviews normally are genuine, and can frequently assist in establishing the needs, variations and penetrations that a training program should include. Feedback at appraisal interview time is valuable since it is timely information.

Training needs differ from worker to worker, and appraisal sessions allow the employee and supervisor / manager to uncover the cause of weaknesses in performance. These deficiencies represent areas for training.

Drive pattern identity

The extent of an employee's development depends on his motivations. Identifying the forces that cause an employee to behave in a certain way may be useful in determining his individual training needs and how to stimulate his desire to fulfil that need. An analysis of this kind, for example, may determine that the employee has an urgent need for self-confidence. His individual program should be made to stress the importance of attitude, skills etc., and any other assets that would give him this self- confidence.

Analyse organisational policy

Organisation policy will affect the amount of training offered. An explanation of various policies should be covered in the training program. Of particular concern are those policies that involve change, alteration and major revamping of training programs.

Whatever the method used to identify training needs, at least the following three points must be kept in view :

1. These methods should be used in combination; you should never be reliance on only one method
2. They may be used to identify training needs of each of the various groups of employees
3. They should be applied to individual employees since training needs will vary with the individual employee

Checklist for training needs analysis

It is helpful to have an organized method for choosing the right test for your needs. A checklist can help you in this process. Your checklist should summarize the kinds of information discussed above. For example, is the test valid for your intended purpose? Is it reliable and fair? Is it cost-effective? Is the instrument likely to be viewed as fair and valid by the test takers? Also consider the ease or difficulty of administration, scoring, and

interpretation given available resources. A sample checklist that you may find useful appears on the following page. Completing a checklist for each test you are considering will assist you in comparing them more easily.

Identify Individual Development Areas

To identify individual learning needs, you need to

- ✓ review the performance required by the task,
- ✓ What outcomes should be achieved by the intended learning, and
- ✓ The objectives of the stakeholders such as learners, trainer, colleagues, supervisors, management, quality assurance staff, health and safety staff

Conduct a training needs analysis

In South Africa today a training needs analysis has to be done with inputs from the workers and it should fit in with their career paths in the organisation as the focus is on life-long learning. The managers of the various departments and sections must also be consulted since they have to release the employees for the training. In some cases the shop stewards must also be involved. Their primary function in the training process is to ensure that everyone with a training need is given the opportunity to attend training.

Review the performance required by the task

The first step is to look at the job descriptions of the employees to determine what the job requires the employee to do.

What outcomes should be achieved by the learning

The next step is to determine the skills and knowledge that the employee has so that the shortfall in knowledge and skills can be addressed by the training intervention. It does not make sense to send a person who has already been working on computers for a number of years to a training intervention that is intended for someone with little or no knowledge of computers. This is called a skills audit.

Consult with stakeholders

Determining the individual training need has to be done with the cooperation of the employee, his/her manager and the shop steward, as well any other stakeholders. It is possible that you will also have to consult with the learner's colleagues, supervisor, quality assurance staff and/or the health and safety staff.

Conduct the learning needs analysis

The fastest and most cost effective way of determining the training need is to send out a questionnaire to the learners and other stakeholders where questions about the individual's knowledge about the job are asked. You could also use the questionnaire to conduct personal interviews with the learners, but this is costly and time consuming.

Follow the guidelines in the table to decide when to use a survey (questionnaire) and when to conduct interviews.

If the population is:	***And time is:***	***And sensitivity is:***	***Then***
Big	Tight	Low	Use a survey
Big	Tight	High	Interview a sample of the population
Big	Ample	High	Interview
Big	Ample	Low	Survey with limited interviews to validate the survey
Small	Tight/ample	High	Interview

Small	Tight	High	interview

You could also observe the learner while s/he is doing the work

Questions to consider

Consider the answers to the following questions when drawing up your questionnaire:

The two most useful questions are:

- ✓ What is the employee doing that s/he should not be doing?
- ✓ What is the employee not doing that s/he should be doing?

This ***focuses*** the responder to the interview or survey towards visible behaviour.

You will have to look at:

- ✓ The Work
- ✓ The Worker
- ✓ The Workplace

The following questions will also be useful:

- ✓ Does the work that is actually being done relate to the purpose for which the working group was established?
- ✓ Are there deviations in procedures from what is laid down, and can the reasons for the change be justified?
- ✓ How do the job description and manual specifications outline the duties and responsibilities the job?
- ✓ Do the supervisor's statements of what the employee should be doing; agree with what s/he tells you?
- ✓ What is the overall level of productivity for jobs requiring similar skills, and are standards of quality and quantity being regularly met?
- ✓ What is the problem?
- ✓ Is what we are talking about as a problem really a training need?
- ✓ What do we all hope to achieve by tackling this apparent problem?
- ✓ What facts, opinions and feelings contribute towards strengthening our growing conviction that there is an identified training need?
- ✓ What alternative solutions should be considered?
- ✓ What are the possible, predicted outcomes to the various solutions?
- ✓ Do we select a solution because it is the best for the individual concerned (the trainee) or because it satisfies us?
- ✓ When, how and where do we implement the training decision we have taken?
- ✓ What criteria must we establish now, to determine whether our decision achieved the expected results?

Some managers and employees will find it difficult to explain what the problem is – besides, managers do not want to admit to having problems. Some managers will tell you in detail what their employees are not doing, but find it difficult to explain what they should be doing. In this case, you can use the following matrix to identify their expectations: (we give you examples in order to explain how the matrix works)

Action	***Object***	***How well? How often? How much?***
What the employee	***What the employee***	

should be doing	***does it to***	
Type	Letters and reports	With all errors corrected
Add 14%	Value Added Tax (VAT)	To all purchases without error
Restock	All shelves	When no customers are in the department
Serve	Customers	Whenever there are customers present
Refrain	From chatting	With other employees if customers are anywhere in the department

A note of caution

People can underestimate or overestimate their knowledge of their work. If we look at computer training, you can, for example, find someone who has only played games on the computer who will tell you that s/he has vast knowledge of computers, while someone else who has worked extensively on computers and who realises that his/her knowledge in the overall realm of computers is limited, who will state that they have no or little knowledge.

It would therefore be advisable to do spot checks through interviews after the completed questionnaires have been received, or to check with the manager about the person's level of knowledge.

When you undertake a survey, make sure that you ask open and directive questions. Also give the respondents an opportunity to state their own ideas. Leave blank lines on the questionnaires – you might get some interesting information.

Define Development Areas

Once you have identified the development areas of the individual, you can define the specific development areas that you have to focus on. From these development areas you will write specific coaching criteria

The development area could be that the learner has to calculate VAT on sales transactions and add this to the invoice without any errors.

When you convert this into coaching criteria, you could say:

At the end of the training, learner will be able to:

1. calculate interest
2. explain the concept of VAT
3. calculate 14% VAT and add this to the total amount of the invoice
4. check own calculations to ensure no mistakes have been made

This will enable you to develop a coaching plan that will focus on the specific development areas.

Formative assessment SO1

TECHNIQUES AND METHODOLOGY

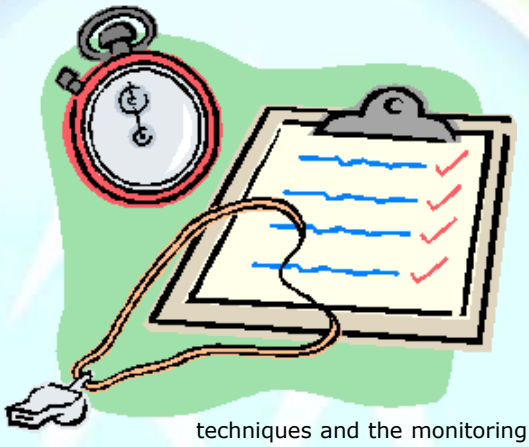
Specific Outcome 2

Select coaching techniques and methodology.

Assessment criteria

- ✓ Coaching techniques and methodologies are appropriately selected based on correct identification of development areas.
- ✓ Coaching techniques and methodologies are appropriate to learners' NQF entry levels.
- ✓ Coaching techniques and methodologies are consistent with performance requirements.

What Is Coaching?



The passing on of skills or techniques and the monitoring and providing of feedback to the employee as they attempt to develop skills or new behaviours.

Coaching involves lasting behaviour change and to implement lasting change we need to create an environment for learning.

Coaching is appropriate when wanting to:-

- ✓ Correct improper or dangerous practices
- ✓ Encourage people to work to their limits
- ✓ Express confidence and support
- ✓ Build on existing skills
- ✓ Provide recognition, encouragement, or reassurance.

The passing on of skills or techniques and the monitoring and providing of feedback to learners as they attempt to develop skills or new behaviours.

It is the relationship between a Coach and a learner, where the aim is to unlock the individual's potential so that he maximizes his performance.

It is a one-to-one process that typically focuses on personal development and problem solving, whereby the coach and learner agree on the issues involved and jointly consider solutions.

Coaching can be for individuals, teams or organisations – the approach towards change and improvement is fundamentally the same, although the tools and techniques used will differ depending on the needs.

Coaching is based on the principle that people have all the resources within themselves to resolve their issues. The coach will help the learner to access those resources by using effective questioning that challenges, stimulates and guides the learner to the solution.

The coach sees the learner as a vast sheet of potential and views him as capable of achieving anything he wants.

Coaching involves helping the learner to learn, rather than teaching him from an expert point of view. The coach provides the structure and focus to allow the learner space to think out loud and achieve his goals.

Styles Of Coaching

S.T.A.C.K. model

Using a simple tool, we can truly empower people to be all they can be.

S.T.A.C.K is one tool that can help.

The Keys to Empowerment are expressed in the acronym S.T.A.C.K.:

- ✓ SUPPORT: Available to coach, Learning from Mistakes. Encouraging, risk taking.
- ✓ TOOLS: Provide the right equipment
- ✓ AUTHORITY: Appropriate decision-making boundaries
- ✓ CONFIDENCE: Feedback, Coaching, Mentoring
- ✓ KNOWLEDGE: Provide skills, Training, Information.

Situational coaching

Situational coaching (from the work of Blanchard) relates to four styles of coaching, each being appropriate to the readiness level of the learner.

By separating these, the coach's behaviours will be determined by the readiness of the learner. The choices the coach makes of which style to use are guided by the readiness of the learner to learn the job.

Telling is appropriate for beginners. You need tighter control of the person's behaviour at first because they know, and can do, very little. Empowering behaviours are appropriate for those who are closer to the required standard.

Empowerment of the learner is the ultimate objective and destination of the coaching process.

From this model, we can see that the learner progresses from level 1, where he has limited knowledge and skills, to level 4, where he is able to do the work.

The left hand section of the model is for people at a low level of readiness who require the coach to show, demonstrate, teach, tell and direct. This style of coaching is effective with beginners.

The right side applies where the readiness of the learner is high (level four) and the coach can let the person get on with the work -It represents the goal – empowerment.

As a coach, you would change your coaching style according to the progress made by the learner, from R1 to R4.

Instruction	**Supervising practice**	**Performance counselling**	**Supporting empowerment**

R1	R2	R3	R4
Readiness level one	Readiness level two	Readiness level three	Readiness level four
Tell Show Direct Encourage	Observe Correct Try Encourage	Support Encourage	Leave to do the job Encourage

G.R.O.W Model

John Whitmore in his book "coaching for performance states that coaching involves four phases

Goals
Reality
Options
What

This technique should be used together with questions: This coaching session is not a forum in which you tell your team member what to do, you have to ask a series of questions in order to help the team member become aware of the problem, recognise the impact on the business, and decide on the best option to improve performance.

Goals: These should be set by the learner and follow the SMART principle. Imagine that you are holding a coaching session with a team member who is under performing in one area. In this case the goal or objective will be to improve performance in that area. You will guide the team member to analyse their own performance and identify why they performed badly (identify their interference).

Reality: This includes taking into account all surrounding factors i.e. current performance, legislation, company procedures etc. In this stage of the conversation you must help the team member become totally aware of the interference, and the impact it has on the business. By the end of this section the team member will have the clearest understanding of the area of poor performance.

Options: Generation and selection of options for improvement. This section may require the mentor to be flexible. You ask the team member to identify the options they have available to improve performance, this may take a series of questions to ensure that they identify all the available options. You must help them make the decision as to which is the best option. (You do not tell them!)

What: Here specific plans for action are formalised. Allocation of responsibilities and resources are agreed. Monitoring and feedback become essential at this stage. W is also for when or wrap-up. This final stage is for allowing the team member to set themselves an action plan for achieving the option, and seeing if they need any further coaching support during the process.

Maintaining the candidate's self esteem throughout is important. - Praise continually.

Coaching should allow for the empowerment of the candidate. In other words it should not be lecture style but rather include:-

- ✓ Questioning

- ✓ Listening
- ✓ Reflecting
- ✓ Guiding
- ✓ Challenging, thereby encouraging the candidate to take ownership of the process.

In practice, since most coaching is driven by questions, this means that different types of question are used at each stage:

- ✓ GOAL – questions to define the goal as clearly as possible and also to evoke an emotional response: What do you want to achieve? What will be different when you achieve it? What's important about this for you?
- ✓ REALITY – questions to elicit specific details of the situation and context: What is happening now? Who is involved? What is their outcome? What is likely to happen in future?
- ✓ OPTIONS – open-ended questions to facilitate creative thinking: What could you do? What ideas can you bring in from past successes? What haven't you tried yet?
- ✓ WHAT – focused questions to get an agreement to specific actions and criteria for success: What will you do? When will you do it? Who do you need to involve? When should you see results?

The GROW model offers an excellent framework for structuring a coaching session. It is particularly useful for beginners, helping them to see the wood for the trees and keep the session on track. However, Whitmore is at pains to emphasise that models and structures are not the heart of coaching:

Until you actually partake in a coaching session either as a coach, or as a coachee, it is difficult to imagine the strength of such a conversation, and what can be achieved by the coach being totally non-directive. Think of it in another way. Very few people are capable of clear logical thought, let alone the ability to focus entirely on one thing, excluding all other thoughts (interference) from their minds. If you as a coach can assist your team member to achieve these two things, then imagine how much help that could be - that is the strength of coaching.

Formal/Informal coaching

The two types of business coaching are not mutually exclusive – many managers use both styles in complementary ways.

Formal coaching	Informal coaching
Used explicitly	Used explicitly or implicitly
Scheduled appointments	Everyday workplace conversations
Programme with beginning and end	Ongoing process, a style of management
Most of the conversation in 'coaching mode'	Manager can switch from coaching mode to other management styles

Formal coaching

The most obvious characteristic of formal business coaching is that it is being used explicitly – during the session both parties are clear that they are engaged in 'coaching' and are committed to this process as well as the outcome.

Formal coaching usually takes place during scheduled appointments. This sends a powerful signal to individual team members that their development and success is important, and that the manager is there to provide support.

When a series of appointments are scheduled, coaching becomes a beginning and end. This can have a motivating effect, with the well-known phenomenon of 'deadline magic' coming into play towards the end of the process, when both business coach and coachee focus their efforts on achieving the goal(s) within the allotted time.

The clear parameters of formal coaching mean that both coach and coachee tend to spend most sessions in coaching mode – i.e. with the coachee doing most of the talking, and the business coach primarily engaged in listening, asking questions and giving feedback..

Informal Coaching

Informal business coaching is a bit of a grey area – when the approach is used implicitly, as part of the everyday conversation between the manager and her team, it may be that neither party would describe the conversation as 'coaching'.

Some team members are uncomfortable with the word 'coaching' or the idea of being coached – but respond well to a manager who takes the time to listen carefully to them and ask questions that empower them to find their own way of meeting a challenge or solving a problem, without being told what to do.

Or a manager may be so familiar with this approach (or it may be so similar to her natural communication style) that she may not consciously decide to 'coach' someone but instinctively listen and ask rather than 'tell and sell'.

Informal coaching does not take place in scheduled appointments but in everyday workplace conversations. These conversations may be short or long, one-to-one or within a group, task-focused or people-focused – what qualifies them as coaching is not a formal model or structure, but a style of conversation.

Because informal coaching is a way of doing things rather than a clearly defined programme, there is no overall beginning and end, but an ***ongoing process***. The conversation becomes open-ended, with markers such as goal-setting and review occurring along the way, not as book-ends but part of a larger process of learning.

Which style should I use?

Neither style is better or worse than the other, and many managers use both. Which one you use will depend on a range of factors:

The manager's preference

Some managers are comfortable with scheduling formal sessions and having a clearly structured coaching programme – others' have a problem doing this. When working with people, it's vitally important to be yourself and use an approach you feel comfortable with. So make sure you are honest with yourself and your team about your own preferences and work with, not against them.

The coachee's preference

It goes without saying that this is at least as important as the manager's preference. Some coachees love the idea of having dedicated time for their own development, as well as clearly defined goals and a structure for achieving them. Others are deeply suspicious of a formal structure for this kind of work, and much prefer to do things in a more informal, casual way. Ignore this at your peril!

Company culture

Just as individuals have preferences, so do organisations. Approaches that are well-received in a large broadcaster or newspaper may be unworkable or inflammatory in a small agency or studio. This doesn't mean you can't try something new, but you may have to be creative about how you sell it to people within the company.

The kind of task

It's difficult to generalise about this, as I've seen both formal and informal coaching used successfully with a wide range of tasks and goals. However for 'big picture' goals such as a large new project, a person's career or annual goals, a formal session can be a powerful way of setting the scene and getting people focused. There

are also many instances in which a smaller or ongoing issue may not merit a formal meeting, but a brief chat by the proverbial water cooler is just the job to tease out a problem and get things moving again.

Steps to follow when coaching

The following steps are suggested to ensure that the training complies with all the requirements

Prepare the person

- ✓ Put him at ease;
- ✓ Describe the job;
- ✓ Get him interested;
- ✓ Put him in the correct position to do the job.

Present the operation

You have to **demonstrate** a task in a practical manner by:

- ✓ Explaining the task in appropriate language whilst demonstrating it
- ✓ Pacing the demonstration to match learners' needs
- ✓ Ensuring the demonstration of the task complies with health and safety regulations as well as other legislation.

Furthermore, as part of the demonstration you have to explain the elements of the task to be performed by

- ✓ Making sure that the explanation of the task is sequenced in a series of logical steps
- ✓ Explaining the required standards for the task and give examples of why these standards must be adhered to

Remember to

- ✓ Describe one step at a time;
- ✓ Stress each key point;
- ✓ Instruct clearly.

Trainee practices task

Ensure that you provide appropriate opportunities for a learner to practice skill and knowledge by

- ✓ Ensuring that tasks are sequenced in a logical manner
- ✓ Ensuring tasks are appropriate to learners' needs
- ✓ Checking learners' understanding of the task
- ✓ Modifying task instructions according to learners' needs
- ✓ Providing supplementary information to learners to reinforce key learning points
- ✓ Orientating learners to the availability of resources

While the trainee is practicing, you have to provide support and advice in relation to the task:

- ✓ Nurture the learner
- ✓ Redirect the learner when he/she is not meeting required performance standards

Then you also have to handle conditions which may occur due to unforeseen circumstances, in keeping with health and safety regulations.

Give feedback and review progress

- ✓ Let him do the job, correcting errors as he goes along;
- ✓ Let him repeat the job whilst you explain key points;
- ✓ Find out whether he understands

You must assess the learners' competence:

- ✓ Evaluate the learners' competence by means of progress evaluation and remedial actions
- ✓ Assess learners' competence to perform the tasks without help
- ✓ Provide feedback on his/her progress to the learner

Follow-up

- ✓ Once you are confident that the learner can do the task by him or herself, let them get on with the job Put him to work on his own, designating someone whom he can go to for help;
- ✓ However, check regularly to see that no mistakes are being made.
- ✓ If a mistake has been made, correct constructively.
- ✓ Ask questions to make sure the learner understands
- ✓ As the learner develops competency, you will reduce the number of checks.
- ✓ Give recognition for progress.

A Recipe for Success

Bear the following in mind when coaching

For learners to succeed they must:-

- ✓ Know what their tasks are.
- ✓ Understand what is expected of them.
- ✓ Be developed in the required competencies.
- ✓ Receive feedback on their progress.

- ✓ Work in a supportive environment where motivation and commitment abounds.

Learning is Most Effective When an Individual…..

- ✓ Is able to see how it will effect and benefit the work process and themselves.
- ✓ Learning is built on existing experience.
- ✓ Is willing and able to learn.
- ✓ Is an active participant in the learning process.
- ✓ Puts into practice what has been learnt.
- ✓ Is able to monitor and asses their own progress.
- ✓ Is able to see the big picture and how things fit together.

The Purpose of Coaching Your Learner

The importance of coaching for an outcome is critical to the ongoing success of your learning as well as your learner's. If you are unable, or unwilling, to Coach your learner toward a successful outcome, then the proliferation of bad publicity that will result will cause your learning to flounder.

This section of the manual has been put together to support you in the development of quality practices that will enable you to build your learning through successfully building your learners' skills and knowledge.

The correct approach is one of excitement; excitement for the positive changes you can effect for your learner and the positive effect you can have on their learning. This approach will bring you the level of abundance you deserve.

Before considering each of the major reasons a learner takes up the coaching program, remember you must be absolutely sure of what those reasons are prior to starting them on the program. But bear in mind these reasons all have their own level of importance and should be given equal respect. One does not take precedence over the other.

Increase Your Learner's Level of Knowledge and Skills

By increasing your learner's knowledge and skills, we mean the wealth of your learner's learning, your learner's actual applicable knowledge and skills and the potential career path of each individual Learner.

Increasing the level of knowledge and skill may be a fantastic focus point, but it is not enough to increase the application of the learning. You must be willing to Coach the learner on achieving learning outcomes as well as career building and positive participation within the workplace. In too many cases you can increase the skills of the learner while decreasing the real meaning of the learning. Think about that for a moment. The result is your learner has difficulty in participating in the workplace as a team member..

It's critical you focus on generating higher skills with a higher level of workplace participation and professionalism in the workplace. Through this avenue you get to build the value of the learner's learning and from this perspective and this perspective only, you build the value of the learning programme, their applicable knowledge and skills and the potential knowledge and skills of each team member.

Increase Your Learner's Available Time

Time is one of the commodities learning programmes never seem to have enough of. One of the consequences of this is that their families suffer. Those that are able to devote sufficient time to their families usually complain that they never seem to have the time to take on new learning opportunities.

Whether it is time to take that long awaited vacation, time to spend with the family, study, there is never enough of it to go around.

When you are coaching, you need to make sure you Coach the learning programme in ways to alleviate the mundane tasks. The learning programme needs to prioritize what they do so they can concentrate on doing the most important and timesaving jobs first.

The difficult part (for you) is how to achieve this without taking up more of the learning programme's time and making them even more frustrated than before. You don't want

to be thought of as part of the problem rather than the solution. It is, therefore, critical you let your learner know it sometimes gets a little harder just before it gets easier; or just before they get results. You are working towards an end result and they must understand this clearly before starting the coaching program.

Make Your Learner's Team More Viable

The team gives the learning its biggest scope for improvement. It is the team that allows you to create more value and more time for the learning programme. For it's the productivity of the team and the ease in which they can generate greater value and knowledge, which is the exciting job at hand.

Your ability to Coach the learning programme on how to focus the team toward achieving greater productivity and value generating activities is critical here. Make sure you spend quality time deciding on the best possible solutions – don't just throw the quickest solutions together as it's this area of the learning that's likely to give you the greatest impact.

Increase Your Learner's Choices

People are at their worst when they think they don't have any choice in life. When they are stuck between a rock and a hard place life becomes a real drain. Your learner will stay on the coaching program if they think, and feel, their choices have increased and their future is getting brighter each day.

It is your job as a Coach to increase that brightness … there is nothing worse than having a Coach that bores the life right out of you. Ask yourself this: "Does my learner have more energy after one of my coaching calls, or less?"

If the answer is less, then you need to recreate yourself and give your learner more excitement and brightness.

You must support your learner by increasing their choices in life and the 'now available' choices within their learning. Brightness for the future – create it now and support your learner in having it always within their learning.

Specified requirements

Any training should be carried out according to specified requirements, as stated in standard operating procedures, the quality assurance requirements of the organisation and health and safety requirements.

You also need to make sure that you comply with the training plan when using resources – you may not use resources for longer than agreed on without getting approval. Any use of resources should also not interfere with the normal operations of the organisation.

Feedback

One of the most powerful tools used in an effective training relationship is the **giving and receiving of feedback**.

Its use is influenced by factors such as the personality profiles of the mentor and learner, the quality of the relationship, the particular situation and the desired outcome.

Feedback is often used to give **positive reinforcement** to a learner when he has done something well. Positive feedback, usually in the form of **praise and recognition**, is a powerful motivator in the workplace.

The way in which you give positive feedback is quite different to how you would convey negative feedback. The following guidelines for giving **positive** and **negative** to a learner may be useful.

Positive feedback

Do you know how to give feedback such that the other person:

- ✓ Wants to hear it?
- ✓ Can understand it and act on it?

- ✓ Doesn't get defensive?
- ✓ Respects your opinion?

Emphasise the positive

- ✓ Determine strengths in the learner and develop those, hence building confidence, self esteem, and motivation.
- ✓ Everyone (even handicapped, disabled or disadvantaged) have strengths. Make sure they are "real" strengths though, and not fabricated ones.

Remove the effect of weaknesses

- ✓ Negativity should not be avoided. It should be faced head on, but with tact.
- ✓ Identify problems, and with the student develop plans to fix the problems.
- ✓ Remove pressure from the student. Give them all of the time they want. Show them that small steps forward can
- ✓ Reach the same final goal as big steps forward.

Positive Feedback	***Negative Feedback***
✓ Praise the learner immediately after the incident has occurred. ✓ Be sincere. ✓ Be specific about what he / she did right / well ✓ Be clear about the effect it has had on you, the team or generally at the workplace. ✓ Tell the learner how you feel about it. ✓ Pause so that the learner may respond. ✓ Encourage the learner to do more of the same if appropriate. ✓ End discussion on a warm note. ***Golden Rule:*** ***Ensure that positive reinforcement is given to learners timeously (immediately after the praise- worthy action).***	✓ Do not evaluate the incident; be specific and descriptive about the problem. ✓ Encourage the learner to self – evaluate the problem. ✓ Reprimand immediately after the incident has occurred or unacceptable behaviour shown. ✓ Do not attack the learner's personality. ✓ Do not use threats or intimidatory tactics. ✓ Do not reprimand in front of others. ✓ Describe the effect the problem has had either on you, the team, or the workplace in general. ✓ Solicit commitment from the learner of the need to change the behaviour or resolve the problem. ✓ Seek a workable solution from the learner and jointly agree on the way forward.

How to give effective feedback

- ✓ Make your feedback ***specific*** – related to behaviour
- ✓ Consider your ***timing***, either before the event in the form of advice, or immediately after as constructive (positive) feedback or reinforcement.
- ✓ Consider the ***needs*** of the person receiving the feedback as well as why you are doing it. Are you "dumping" or genuinely attempting to improve performance or the relationship.

- ✓ Focus on ***behaviour*** that can be improved.
- ✓ Focus on the ***problem*** not the person.
- ✓ Define the ***impact*** the performance/behaviour has on the team, the business, the individual.
- ✓ Use ***"I" rather than "you"*** statements to reduce defensiveness.
- ✓ Ensure ***clear communication*** has occurred.
- ✓ Give feedback in a ***calm*** way, not allowing emotions to influence your language, tone or body language**.**

Use a participative style

In order to gain the learner's commitment to accepting and reacting to feedback, it is better to use a participative style by asking the learner to summarise his strengths and weaknesses on the topic under review as suggested below.

Strengths	***Opportunities***
Invite the person to summarise his or her strengths.	Invite the person to summarise skills not currently performed well. Objective is to gain acknowledgement of areas where coaching is needed.
Clearly support the self-assessment of those you consider real strengths.	Clearly support the self-assessment of those you consider real.
Get further clarification on those behaviours you do not consider real strengths.	Get further clarification on those behaviours you do not consider real opportunities.
Identify other strengths that the person has overlooked. Cite specific examples.	Identify additional needs the person may have overlooked or avoided. Cite specific examples.

How to receive feedback

A trainer's ability to receive feedback is just as important to his or her success as giving it.

Listen carefully and clarify, where necessary.

- ✓ ***Welcome*** the information as an opportunity to learn something.
- ✓ Ask for ***honesty*** and openness.
- ✓ Ask for ***specific*** examples.
- ✓ ***Do not argue.***
- ✓ ***Do not get defensive***.
- ✓ ***Thank*** the other person for giving you feedback.
- ✓ Give a ***commitment*** that you will reflect on it and take necessary corrective action.
- ✓ Think about it ***seriously*** and act thereupon
- ✓ ***Evaluate*** your reactions to feedback.

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Performance Assessment

In order for an employee to succeed he must have feedback on his performance. In some companies this takes the form of an annual performance review. In other companies, unfortunately, it does not happen at all.

Regular feedback should be given on performance and when feedback is given regularly it becomes a major motivational tool.

1. ***Recap on the objectives set at your previous meeting***

   One needs to have something to talk about. Standards of Performance and Objectives are good building blocks in an assessment interview.

2. ***Ask the employee to tell you how far he has progressed with his projects and give recognition for achievements***

   Ask the employee to give feedback rather than telling him how you think he has done. This will enable you to see where he puts his emphasis. Recognition is an extremely important motivational tool - avoid saying: "You have done well ... But!!!"

3. ***Ask for and listen uncritically to his explanation of why the targets were not met***
4. Listen openly. You may discover that there were some very real problems facing the employee. If you consider his answers superficial and indicative of laziness you may decide to employ the unsatisfactory performance frame at this point.
5. ***Ask for his suggestions for completing the projects.***

   He will be more committed if he suggests solutions to his own problems. It must be important for him to realize that the projects must be completed.

6. ***Tell him where you consider he can improve and express your confidence in his ability to succeed, building on strengths***

   Take care to build the individual rather than break him down. It is in your interests as a manager to see that he succeeds.

7. ***Together set new objectives and ask if there is anything else he would like to achieve***

   The key word here is together. You are discussing your employee's job and his future, so he must be involved. By asking him if there is anything else he would like to achieve and you may discover areas of concern of which you were unaware.

8. ***Ensure employee's acceptance of his objectives and standards of performance and agree on follow up dates***

   Before closing the interview ensure that you are both in accord with what has been discussed. If the employee has only paid lip service to what has been discussed the chances of him attempting to meet the objectives are very slight.

Evaluation sheet:

Trainer's name:

Employee's name:

Instruction: Indicate whether you followed the steps. If you think that any point was well handled or cold be improved upon, please make a few notes in the appropriate column.

The frame steps –did you:	***Yes***	***No***	***Well- Handled***	***Could be improved***

1. Recap on the objectives set at your previous meeting.				
2. Ask the employee to tell you how far he has progressed with his projects and give recognition for achievements.				
3. Ask for and listen uncritically to his explanation of why the targets were not met.				
4. Ask for his suggestions for completing the projects.				
5. Tell him where you consider he can improve and express your confidence in his ability to succeed, building on strengths.				
7. Ensure employee's acceptance of his objectives and standards of performance and agree on follow up dates.				

Dealing With Unacceptable Performance

Unfortunately there will be times when an employee's performance cannot be corrected at the coaching stage. You will then find that you have to take corrective action. This action must be appropriate to the occasion and within the constraints of labour legislation.

1. Explain to the employee what you have observed and why it is unacceptable. Ask for and listen openly to the reasons which the employee offers for his behaviour.
2. State your requirements and guide the employee to formulate his programme to meet these requirements.
3. Offer your help to the employee to meet the requirements. If applicable, indicate what disciplinary action will be taken and why. Agree on the steps to be taken by each of you.

This frame will help you to improve your subordinate's inadequate performance and to correct their unacceptable personal work habits.

Many managers avoid such interviews with their staff because they hope that the situation will rectify itself. This rarely happens and the situation often deteriorates to the point of no return, namely resignation or dismissal. If you follow this frame it will help you handle the situation competently and without embarrassment.

Let us look at the major points.

Explain to the employee what you have observed and why it is unacceptable

Before calling in your subordinate, it is important that you have collected your facts and that you have compared his actual performance to what is required of him by yourself and the company. Ensure that you are dealing with specific problems and not reacting to the employee subjectively. When you call him in, explain what you have observed in a non-threatening manner.

- ✓ Do not beat about the bush.
- ✓ Explain how the observed behaviour falls short of the requirements of the job and why such a shortfall is unacceptable.

Ask for and listen openly to the reasons which the employee offers for his behaviour.

It is important that the employee feels that he is given every opportunity to explain himself.

This is vital as you may discover that the problem is not a disciplinary one at all.

It is essential that you ask open questions. These are questions that encourage him to speak, rather than limit his answer to yes or no.

- ✓ Having asked your open questions, it is important to listen to his answers.
- ✓ Do not pre-judge him but concentrate on his answers with an open mind and evaluate what he is saying.

If, after listening to his answer, you realize that the offence is so serious as to require action in terms of your company's disciplinary code, inform him that an enquiry will have to be held.

Give him the time and place and inform him that he may bring a representative and any witnesses he may wish to call.

State your requirements and guide the employee to formulate his programme to meet these requirements

The point of this interview is to identify and rectify performance problems, it is therefore important to highlight the requirements of the job and to refocus the employee's attention on them. It is not necessary to spend a lot of time dwelling on the past once the employee realizes his mistake. It is necessary, however, to concentrate on the future and help him design an action programme which will help meet the standards expected of him

Offer your help to the employee to meet the requirements

The employee may need help in liaising with more senior staff or in obtaining interdepartmental co-operation; such help if required should be given. It is important that he knows of your interest in his successful resolution of the problem and feels that he can come to you if he runs into trouble.

If applicable, indicate what disciplinary action will be taken, and why

The offence may be so serious as to warrant disciplinary action, should it occur again. Ensure that such action would be appropriate to the offence and in accordance with the company's agreed disciplinary code. It is important to inform the employee if you intend to carry out disciplinary action should he not improve. The employee is thus fully aware of the possible consequences of his non-compliance.

Agree on the steps to be taken by each of you

It is essential that both of you are in agreement with the requirements, action plan and commitments discussed in the interview. This ensures that there are no misunderstandings which could give rise to a loophole for further non-performance.

One of the best ways to handle this point is to recap at the end of the session and to write down points agreed on, with both parties keeping a copy.

Evaluation sheet:

Manager's name:

Employee's name:

Instruction: Indicate whether you followed the steps. If you think that any point was well handled or cold be improved upon, please make a few notes in the appropriate column.

The frame steps - did you:	***Yes***	***No***	***Well- Handled***	***Could be improved***
1. Explain to the employee what you have observed and why it is unacceptable.				
2. Ask for and listen openly to the reasons which the employee offers for his behaviour.				
3. State his requirements. Guide the employee to formulate his programme to meet these requirements.				
4. Offer your help to the employee to meet these requirements.				
5. Indicate what disciplinary action would be taken, and why.				
6. Agree on the steps to be taken by each party.				

Formative Assessment SO2

COACH CONTACT CENTRE PERSONNEL

Specific Outcome 3

Coach Contact Centre personnel

Assessment criteria

- ✓ Appropriate support is provided.
- ✓ Call centre specific coaching principles are adhered to - informal and formal coaching methods are used.
- ✓ Relevant, objective assessments are conducted.
- ✓ Coaching content is consistent with specific development areas.
- ✓ Company defined coaching targets and objectives are reached.
- ✓ Reports are provided to learners and management. Assessment Criterion Range: Include but not limited to work the floor, coaching from statistics and/or call centre reports. Formal coaching: One-on-one through listening to live calls, taped calls.

Coaching programme Building Blocks

The following steps will ensure a successful coaching programme in any contact centre:

- ✓ identify underlying performance issues
- ✓ create an action plan (the coaching plan)
- ✓ communicate with the contact centre agent
- ✓ provide feedback that is consistent and timely and reinforce improved skills/ knowledge/ behaviour

This is similar to what was discussed in the previous sections.

Coaching techniques

Following are some coaching techniques that are commonly used in contact centres:

Whisper coaching	This takes place in real time. The supervisor coaches the agent while the agent is handling a call. The supervisor whispers in the agent's ear and is not heard by the caller
Barge-in coaching	Real time. The supervisor joins the call and helps to resolve the issue
Conferencing	An agent brings a colleague into the call who knows how to solve the problem
One-on-ones	The supervisor or coach conducts a formal face-to-face training session with the agent
On-the-Spot	Supervisor listens to the agent when walking around or monitoring the call live and then provides immediate feedback
Peer-to-peer	Agents support and coach each other
Side-by-side shadowing	Supervisor sits with the agent during a pre-arranged time to listen, observe and give immediate feedback
Self-assessment	The agent is given the opportunity to review and critique their own transactions and to identify areas that they think they need coaching on
Real-time aided pop-ups	An automated feedback pops up onto the agent's screen and suggests the appropriate action
IM/Chat	Supervisors type a chat message to the agent to give instructions and support. Or, the agent asks the supervisor for help
Broadcast messages	The supervisor delivers a message to all the staff via a system notification that is sent using voice messaging or text system
Personalised message	The supervisor sends a personal message to one agent
Best practice clips	A call that has been handled correctly is shared with all the agents in order to show them how to address a similar situation correctly
Coaching packages	The supervisor shares a packaged PowerPoint presentation that covers a specific policy or procedure with the agent
Simulation	The agent is given practice calls that mimic live customer interactions. This can be done via a system or through role playing

Team meeting	A group of agents meet to discuss certain topics
Quiz	Used to reinforce information and measure content retention

On-The-Spot Coaching

What Is On-The-Spot Coaching?

Coaching On-The-Spot simply means that coaching conversations are implemented on the call centre floor. There are three important components for effective On-The-Spot coaching. The coaching should be:

- ✓ accomplished immediately after an observation
- ✓ on the floor, right at the telephone agent's desk and
- ✓ limited to no more than one or two minutes.

1) Accomplished Immediately after an Observation:

If a telephone agent did something very positive, he/she is much more likely to continue using this technique if the reinforcement takes place immediately. Additionally, telephone agents are much more likely to eliminate negative or ineffective techniques when the supervisor speaks up about it right after a call. Waiting until a regularly scheduled coaching time won't have the same developmental impact. It may have no impact at all. Nothing takes the place of immediate coaching.

2) On the Floor, Right at the Telephone Agent's Desk:

Although this may scare some hesitant coaches, this component of On-The-Spot coaching pays great dividends. When a telephone agent has done something well, "public" feedback will inspire that agent. It will also motivate others that heard the feedback. Other agents will want to get in on the compliments, and they know that the way to do this is to use the same effective telephone techniques.

Even skill-based, critical coaching can be done right there at their desks. For example, a telephone agent that forgot to say, "Thank you," or that hesitated when closing the sale can be coached immediately. When others hear the feedback, they will remember not to do the same thing. Since all coaching can be done with a positive discussion, critical feedback doesn't have to be embarrassing or inappropriate for the centre floor. There are, of course, some "dysfunctional" behaviours that should be treated in private.

3) Limited to No More Than One or Two Minutes:

On the call centre floor, long coaching dialogues will lose their effect. Since telephone agents have to jump back on calls quickly, we have found that limiting dialogue to a minute or two will effectively complete the coaching, yet will not lengthen average handle times. The best way to accomplish this is to limit the skills on which you intend to coach to one or two. If the supervisor observed the telephone agent doing nine or ten things very well on one call, he/she should pick the top two and focus the coaching on these prioritized items. The same applies for the critical coaching. Having to maintain a short dialogue will also teach supervisors how to speak concisely and eliminate lengthy litanies that could be confusing or send the wrong messages to telephone agents.

What Types of Coaching Should be Delivered in Private?

Not all coaching can be implemented using the On-The-Spot approach. Any critical coaching that will focus on "dysfunctional" behaviour should be done in private. Dysfunctional means that the supervisor is dealing with bad attitudes or behaviour that can be disruptive to other telephone agents because it is so negative. Examples of dysfunctional call centre behaviour include continually returning late from breaks, speaking very negatively about the company, swearing, excessive personal calls, disconnecting angry callers just because they are difficult to deal with, etc. It is important to note that none of the examples above deal with telephone skills. All telephone skills should be coached on the floor, On-The-Spot.

Remember to Employ Balanced Feedback

The only danger to on-the-spot coaching is when supervisors only use it to focus on improvement opportunities. Balanced Feedback means beginning with one or two positive comments, and then moving on to the improvement discussion. Since most calls will have at least one or two positive items, we strongly recommend beginning with these. "Mark. I really liked the way you greeted the caller. It was so upbeat and friendly. Thanks for doing that. On future calls, one thing I'd like to see you improve on is.." Using Balanced Feedback for critical coaching discussions will help prevent the telephone agent from feeling "picked on."

Benefits of On-The-Spot Coaching

When supervisors employ on-the-spot coaching for at least one hour each day, telephone agents thrive. This is because they see their supervisors in a developmental capacity, not just when there are fires to put out or escalation requests to transfer. Telephone agents gain respect for supervisors and improve their telephone skills as a result of the coaching. Supervisors build confidence in their coaching ability and build stronger, closer ties to their employees. The centre thrives because everyone is on the same page regarding behavioural expectations and because the new "closeness" will always bring positive results.

Peer coaching

Peer coaching works because both the 'official' coach and agent peer understand deeply, and personally, the issues and pressure that other agents face. It works also at an organisational level because the learning between client and coach transfers to the organisation. It's a powerful way to build communities and a culture of support and achievement.

Care does need to be taken in preparation, however, because peer coaching doesn't work when peers haven't learnt how to coach – when they unhelpfully give their advice, 'demonstrate' without insight, pass on their own faults or prejudices, or accept poor performance as 'all that can be expected in the circumstances'.

Call Record Method (Taping)

This is similar to the self-assessment method

Call centre becomes the important factor of a business, since they facing the customer calls directly. But not all call centre agent know what they have to do when make any call with customer. As the owner you should prepare them to take care your customer as well as you want.

The call record method is one of the best approaches to coaching agent phone calls and ensuring quality. Here's a 9-step plan for effectively coaching call centre agent phone calls:

1. Randomly record 2 –3 telephone calls. Random recording is important. Do not record 3 calls back to back or on the same day, as your employee may be having a bad day and this may be reflected in all of one afternoon's calls, but is not necessarily reflective of their typical performance.

2. Review the calls and note strengths and opportunities. Before meeting with your employee, listen to the calls and note what they did well and identify 1 –2 opportunities for performance improvement.

3. Play one tape and let your employee listen. During the playing of the tape, you do not need to respond.

4. Have your employee respond to the tape. After the tape is played, ask your employee to respond. Most employees will be overly self-critical. Your employee will likely note many opportunities for improvement and struggle to articulate what they've done well.

5. Coach the call. Use the "sandwich" approach. Tell your employee what s/he did well, followed by constructive feedback, and then end with positive feedback. When offering constructive feedback, share only one opportunity for improvement. The employee has likely observed and stated several improvement opportunities so there is no need to bring these up again Try to mention one thin g the employee did not bring up and offer this as your constructive feedback.

6. Gain commitment for performance improvement. Ask the employee, "What specific steps will you take over the next 5 days to improve in this area?" Write down what the employee states and repeat it to her. Summarize the session by reiterating strengths and offering a vote of confidence that she can improve in the identified area.

7. Repeat steps 2 – 6 with a second and perhaps third tape if necessary. The point of numerous recording is that an employee may respond defensively stating that was just a "bad" call. If that is the response, you may choose to review a second or third tape.

8. Follow-up before the next agent coaching session. Check with your employee in between coaching sessions to keep the commitment top of mind. You can touch base with your employee via email or a personal conversation.

9. Discuss improvement in next coaching session. Before listening to calls in the next coaching session, ask your employee how she's progressing toward the goal of the last session. Look for improvement on calls reviewed in this session.

Remember

The important thing is to select more than one style of coaching and also to use KPI's to monitor the performance of individual agents.

Also motivate the agents by recognising and praising their performances and improvements

Continue to provide support and coaching where needed – for coaching to have a lasting impact it must be delivered consistently.

Make sure that the coaching content is consistent with the specific development areas.

You also have to achieve coaching targets and objectives as required by your company

Reporting

You will be required to report to the stakeholders, learners and management, on the progress of the learner. The form of reporting will

depend on the standard operating policies and procedures of the organisation, but could include:

- ✓ Meetings with the stakeholders
- ✓ Memos sent to the stakeholders
- ✓ Formal written reports

Whatever the form of the reporting, you will have to make sure that the report conforms to the quality assurance requirements of the organisation in terms of the content, the format of the report and the distribution of the report to all the relevant stakeholders.

In your report you have to state:

- ✓ Learner's progress
- ✓ Learner's readiness for formal assessments
- ✓ Base your recommendations about learner's readiness on the findings of the learner's progress

Before you recommend that a learner be assessed, make sure that the learner is ready to be assessed

Your reports will also include details about the coaching method followed

Assessment methods

There are five possible assessment methods that you can use.

- ✓ Observation. It means to physically observe a learner carry out a particular activity or task.
- ✓ Simulation. It is when a practical activity is carried out in a simulated environment.
- ✓ Questioning/Testing. When questions are asked directly to the learner. It can either be orally or written.
- ✓ Evaluation of product. It is the process of evaluating something (a final product) that the learner has made or done.
- ✓ Testimony. Gathering evidence from a third party such as a manager or supervisor.

Guidelines for assessment

- ✓ Assessment should comply with three important principles. These principles are:
- ✓ Appropriateness. Assessment method should be appropriate to the outcome that is measured.
- ✓ Manageable. Assessment activities should be kept as simple as possible both to the learner and the assessor.
- ✓ Based on Individual Needs. Special requirements of learners should be taken into account for example when a learner communicates in a language different from his/her first language.

In the table you will find guidelines to incorporate assessment into the learning material. It also provides some tips on how to apply it.

Guideline	***How?***
Plan to ask relevant questions.	Decide when it will be relevant to ask questions. Before or after a new knowledge concept? To integrate knowledge/understanding.
Plan self- and peer assessment.	Allow the learners to test themselves as well as each other.
Plan individual and group assessment.	Assess learners individually and assess them in a group situation.
Assess each point before progressing to the next.	Ask questions or conduct an activity after each or a group of learning points. Only when learner's responses are satisfying they are allowed to continue.
Plan to make assessment fun.	You may include a quiz, crossword puzzle, have a competition, make a poster, make a video recording, role-playing, or build something.

Assessment instruments

Examples of assessment instruments

Short answer questions	Reason questions
Assignments	Oral tests
Case studies	Completion questions
Examinations/tests	Simulations
Role plays	Log books
Matching questions	Multiple response
Personal interviews	Practical exercises/demonstrations
Portfolio	Projects
Questionnaires	Restricted response questions

Formative assessment SO3

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FORMATIVE ASSESSMENTS WORKBOOK

Formative assessment SO1

Work in pairs

Use yourself as an example.

- ✓ do a needs analysis to identify areas where you possibly need coaching to enable you to do your work effectively and efficiently.
- ✓ translate these areas into specific coaching criteria

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Formative Assessment SO2

Individual self-assessment

1. Instructing

Give an example of this style.

Where would you use it?

2. Supervising Practice

Give an example of this style.

Where would you use it?

3. Performance Counselling

Give an example of this style.

Where would you use it?

4. Supporting Empowerment

Give an example of this style.

Where would you use it?

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Formative assessment SO3

Work in pairs

Refer to the assessment for section 1. Prepare for and coach your fellow learner about one aspect of the development needs.

Change roles, where you will be coached by your fellow learner. Discuss the process followed:

Which coaching style did you use?
Did this style work?
Would you use a different style next time? Why?
Which aspects of the coaching went well?
What would you do differently next time?