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Staff Development

Are you getting the most from your coaching efforts?

One-on-one coaching is one of the most important parts of the customer service manager's job. If your service organization is aiming to be "best in class" it is only possible through a sharp focus on performance and continuous improvement. Coaching provides the framework, the relationship, and the feedback necessary to support reps in this effort.

"It's through the success of your individual service representatives that your organization will be successful," says Charlotte Purvis, consultant, communications coach, and head of Purvis Communications Inc. "Coaching is the method that we use to connect our corporate goals to the continuous improvement of our customer service reps."

That connection also points to one of the main obstacles to effective coaching — the ability to separate one's role as a manager from one's role as a coach. "Effective managers function with their eye on the organization — managing performance and other administration functions and processes," Purvis says. "And while the coach may have organizational goals in mind, true coaching really focuses on the individual. The most successful coaching managers I have dealt with are able to find a balance

— and they know that conducting a performance appraisal is a whole lot different than conducting a coaching session."

Preparing for a coaching session

Reps need coaching in a lot of different areas, and one of the first things that a coach needs to do is identify the skills or behaviors where a rep needs help. One of those areas often is empathy. "Customers often identify this in surveys as being important to them," Purvis says. "They want to know that the person at the other end of the phone cares about them and their issues."

Another important area is general courtesy and using "courtesy phrases" such as "Please," "Thank you" and "May I?"

A third area is call management — making sure that the call has a beginning, a middle, and an end, that the necessary steps were taken, the necessary information collected, and that the call is conducted smoothly and logically, with the rep always anticipating customer needs.

A final area where it is important to provide regular coaching, says Purvis, "is around the area of managing challenging situations —

where there is dissatisfaction, disappointment, or there has been some miscommunication."

In addition to identifying areas in which coaching is needed, managers should also prepare for coaching by gathering information about the customer experience. "Try to look at coaching needs from the point of view of the customer," Purvis says. "So, look at customer feedback, do walk-arounds in the customer service center, and get any stakeholder or partner feedback on the customer experience that is available. Even when you are doing side-by-side observations or listening to recorded calls, keep the customer's perspective in mind."

Purvis also suggests that if you are a new manager, or new to coaching, you speak to a more experienced manager about what to do and what to expect, and even ask that person if you can practice doing a coaching session with them.

Conducting the coaching session

When starting a coaching session with a rep, it's important to provide a general goal or context for the coaching. "In other words," Purvis says, "you don't listen to 20 of the rep's calls and then walk in and start coaching — because you don't have a place to start."

So have a goal in mind. For instance, "Today the coaching

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session will be on what we've learned from customer feedback." Or take a developmental goal, i.e., "Our last few staff meetings have addressed call management and metrics, so let's talk about those in the context of the calls that I have reviewed."

Another possibility is to take an organizational theme for your coaching. For example, "Everyone in customer service this month is working on our courtesy phrases." "Having something that everyone is working on together is a great way to create a context for your coaching efforts," Purvis says.

Purvis also warns that "managers should avoid the notion that feedback is positive or negative. Trying to balance the amount of positive feedback with the amount of negative feedback is a bookkeeping exercise that often trips up managers and confuses reps. So just get across the message that feedback is neutral."

One way to do this is by delivering feedback in what Purvis calls the "order of appearance." Just go through the call, from beginning to end, and deliver feedback related to established performance standards at each step.

It's important to use neutral language when delivering feedback, and to focus on what is factual and measurable — without accusing or editorializing. For instance, don't say, "You pretty much forgot to use the customer's name this week, didn't you?" But instead, say, "Our standard is to personalize each call, and in the five calls that we reviewed, the customer's name was used only once."

Finally, don't forget to involve the rep in the coaching process. "One way to get the rep more engaged is to turn the process around a bit and ask him or her questions based on the calls that have been reviewed," Purvis says.

Some reps will get more out of coaching than others

While all reps need and will derive some benefit from a manager's coaching efforts, Charlotte Purvis of Purvis Communications Inc. identifies two groups of customer service reps who are likely to benefit the most.

"Customer service reps who don't just buy into the organizational commitment to continuous improvement, but who also have a personal commitment to continuous improvement, are going to benefit the most from coaching," Purvis says. "These are the reps who come to the manager and say, 'I just had a call that didn't seem to go so well. Here's what I said. What could I have done differently?' These are the reps who have taken coaching to the next level, where they are taking the coaching that you are providing and beginning to take on the responsibility for new directions themselves."

She adds: "For this group, you should not only select calls for them to listen to, but let them select calls that they want to review, as well."

Another group that takes well to coaching is reps who have professional development goals in mind, and they see what they can learn from coaching as part of their development to reach the next level.

For this group you might find yourself acting as much as a mentor as a coach. "And for this group, you don't just talk about calls, but you talk about their professional goals and their developmental progress. And you might use those goals as a context for your coaching efforts," Purvis says.

"For instance, 'Based on the greeting that the customer heard on this call, what do you think would be her first impression of our organization?'"

Closing and follow-up

Purvis recommends giving the rep an assignment of some sort as a way to close the coaching session. For instance, "Between now and our next session, we'll review your calls to see if we are at 100 percent in terms of using the customer's name on calls." Giving an assignment rather than just pointing out a problem can really help. "Work on the partnership and engagement versus just focusing on the pieces of the call," she says.

Another way of closing the coaching session is to ask the rep a question like, "What is your takeaway from this session that you can use on your very next call, to take it to the next level?" Purvis says, "Have them give you their takeaway

and how it can be applied — i.e., "Well, now I see how I can better manage my time on the call." (This is also a good reason for scheduling coaching sessions early in the day. You want the rep to have time to put what you've discussed in the coaching session into practice.)

Purvis also recommends that coaches provide a recap of the session as they close. For instance, "So the three areas we worked on today were such and such, and you said that your takeaway was such and such. And here is what we will be working on for our next session in two weeks."

It's also nice to be able to give the rep some additional resource that they can review and that might help them in their performance improvement efforts — an article, a DVD, or a link to something helpful online, for instance.

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