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The Data-Driven Supervisor's Handbook

5 proven coaching strategies to improve contact center culture and productivity

Introduction

In today's contact center, the power dynamic has shifted. In light of the **Great Resignation**, agents have more leverage than ever before and are being more vocal about what they want and need from their employers. According to a recent **survey from Salesforce**, 71% of customer service agents have considered leaving their jobs in the past six months, and 69% considered leaving the customer support field altogether. For managers, 50% have seen an increase in resignations in their departments.

The result? A high number of open customer support roles and not enough people to fill them. Among the steps you must take to retain your existing talent and create a positive culture, you must provide the 1:1 coaching and formal training that your agents need to succeed. These efforts will pay dividends by helping employees remain engaged and feeling like a valued part of your company.

According to McKinsey (see Figure 1), many contact center organizations have relied on a one-size-fits all approach to coaching for far too long. Instead, coaching and performance management should be personalized and tailored to the individual.

But, with large, distributed teams, how do your contact center managers and supervisors become more effective coaches at scale? Data-driven approaches to coaching can, along with AI-powered technology, help alleviate pressure on managers by delivering detailed insights on performance. In fact, using AI to analyze 100% of customer interactions can reveal new ways to:

- Cross-pollinate best practices from high performers

- Identify and coach to specific development needs

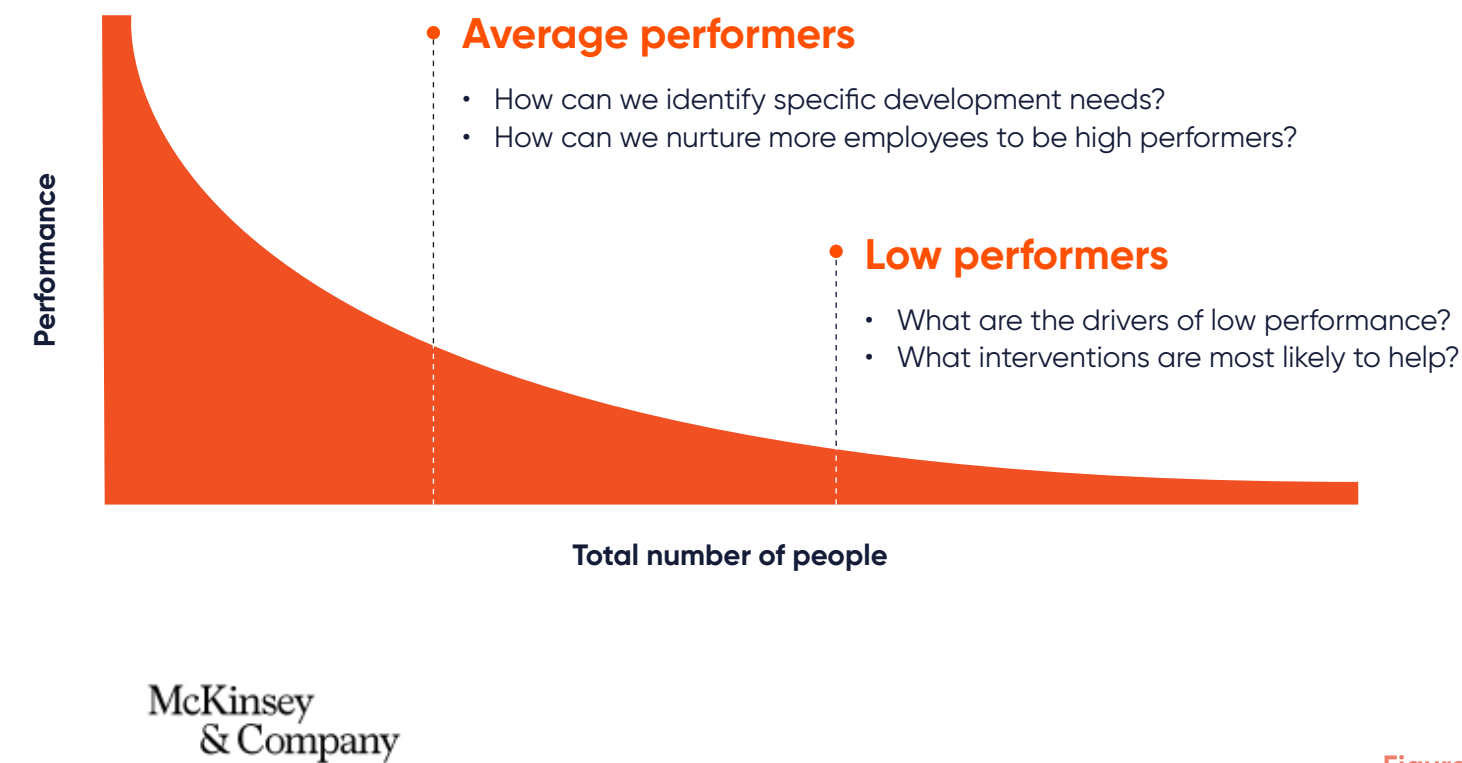- Determine real-time interventions to help agents succeed

Exhibit 1

Figure 1

The following five strategies have proven to build a positive culture, while improving productivity in the process.

Strategy 1:

Align quality assurance and performance KPIs with coaching

Many organizations wrongly assume that coaching metrics must be a completely separate objectives from business and compliance-oriented key performance indicators (KPIs). The truth is, KPIs can serve as a starting point for a formal coaching program. And AI technology can help facilitate this by delivering the insights needed to align both performance and coaching benchmarks.

For example, due to the nature of its business, a healthcare revenue cycle management company needs to adhere to strict compliance standards – from HIPAA to PCI. As a result, the company must maintain stringent QA policies and track agent adherence to specific guidelines.

These guidelines are constantly changing. After a voicemail requirement change in 2019, agents could no longer leave messages saying that they were collecting a debt for medical reasons. The company needed to make quick adjustments to agent training and scripting based on these industry requirements.

To meet these complex guidelines, the company uses conversation intelligence technology to analyze 100% of customer conversations. The technology fulfills QA and operations requests by searching interactions for specific verbiage, ensuring the company's agents are meeting clients' customer satisfaction and compliance requirements.

Beyond monitoring for compliance adherence alone, managers use dashboards to check in daily with their direct reports. They reward agents who meet and exceed customer experience (CX) expectations, and for those who are underperforming on compliance goals or otherwise, managers address any issues with targeted coaching and feedback, creating a culture of continuous improvement.

Similarly, **Gant Travel** started with automated QA goals that transformed into a more effective coaching strategy. By analyzing customer conversations at scale, the organization was able to gain back supervisors' time from monitoring random calls and redirect it toward continuously sharing feedback with agents. As a result, there has been a 400% increase in frequency of feedback.

Gant Travel agents use scorecards to see the progress they are making in key areas. Agents now have time to review their customer interactions and supervisors can spend time coaching based on what the data is telling them.

Beyond QA alone, the company plans to look at various customer personas and correlate sentiment data with each one to determine how to best interact and support behaviors. These types of process improvements help agents stay one step ahead of customer demands. Most importantly, Gant Travel plans to share customer data with other departments to drive transparency throughout the company. One of the main benefits of conversation intelligence technology is the ability to drive organization-wide business performance improvements – from refined product development strategies to improved marketing and sales success.

Strategy 2:

Combine relevant datasets to drive customer understanding

A single source of data is helpful, but combing multiple data sources that exist across your organization and analyzing them at scale can drive deeper understanding of your customers' behaviors, wants and needs. Combining qualitative and quantitative data can result in novel insights that improve how you coach your agents. For example, many organizations combine contact drivers (or the motivations behind why a customer is reaching out) with customer journey mapping, satisfaction and retention metrics.

This approach enables your support teams to identify the customer journeys that have the biggest impact on specific business goals, such as increasing revenue or reducing customer churn.

Additionally, combining conversation intelligence with customer journey mapping can help you better forecast and predict customer behavior based on data gained through historical interactions and similar messaging at various touchpoints.

Using this information, managers and supervisors can create more compelling and comprehensive training programs and 1:1 coaching based on actual customer journeys. For example, **Hoist Finance** used contact drivers to help improve their customer interactions, taking their typical post-call analysis a step beyond traditional agent disposition codes. The team used this data to look for opportunities to automate some customer interactions and provide feedback to agents on how to modify behaviors to better understand those contact drivers.

Coupled with a conversation intelligence platform, disposition codes can help your customer support leaders and agents better understand what actually happened on a call (analytics) vs. an agent's perception of what happened. This type of blended data can help your agents grow in their roles, as they gain greater awareness of how to recognize contact drivers and root cause.

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Strategy 3:

Rely on positive reinforcement

Coaching isn't just about identifying areas for improvement. A major part of coaching is cross-pollinating agents' positive behaviors and best practices with the entire team. What's more, calling out positive accomplishments can help your agents feel more validated and successful in their jobs.

That's what a major home services provider focused on when designing an effective sales and support agent training program. The company analyzed its sales operations data using conversation intelligence to determine trends in what delivered the best outcomes when customers reached out with questions or issues with its website.

Using this data, the provider found that successful sales representatives relied on empathy and understanding the customer's situation to prevent customer churn. By analyzing the conversations of these successful representatives, the management team devised a strategy to coach every employee for empathy, and reward successful outcomes.

Specifically, managers trained each person to use more empathetic statements, and provided new tools that empowered sales representatives to be more effective in their real-time customer interactions. Rather than working off of data on what went wrong, using what went right was far more motivating for employees.

As a next step, the company started feeding data into the conversation intelligence platform to determine attrition and retention trends by hire date across their salesforce. They're comparing this data against sales KPIs, such as customer close rates. As a result, they are now able to see job satisfaction trends, such as when agents are burning out. From there, managers can provide further coaching or move agents into a different role that's more suited to their strengths and interests.

Strategy 4:

Deliver real-time feedback

The same McKinsey report mentioned earlier discusses the value of AI in a real-time context. By delivering timely "nudges" to your agents, technology like conversation intelligence can help them navigate difficult situations and avoid unnecessary escalations or issues. Supervisors and managers can use nudges to understand daily and weekly team performance trends, and identify what actions to take next (see Figure 2).

Exhibit 2

AI-driven nudges can encourage higher job performance in many ways

Types of nudges, by job level

For employees

- AI-backed indights added to existing dashboards
- Prework training on predicted issues employee might face
- Live nudges during work to ensure optimal performance
- Postwork performance report and coaching nudges

For supervisors

- AI-backed insights included in existing dashboards
- Daily reposrts on team performance and key actions to take
- Weekly reports for coaching and celebration

McKinsey & Company

Figure 2

Top 10 uses for real-time conversation intelligence alerts

1. **Compliance:** Notify your agents using a pop-up or color-coded message when they are out of regulatory compliance. This applies to any contact center where an agent is required to say things to customers in a specific timeframe, as is the case with the mini-Miranda in collections environments. It also pertains to the need to verify a caller's identity or to read a non-disclosure statement for a sales transaction.

2. **Supervisor/agent alerts:** Notify your supervisors and/or agents when predefined situations occur during a phone conversation. One example is when a customer sounds angry or frustrated and threatens a lawsuit. You can also listen to the agent and notify them when they're not communicating effectively or say certain phrases that could come off as combative. The goal is to de-escalate a situation by calling the agent's attention to what is happening. It's not perfect, and if the interaction continues to falter, a supervisor can be prompted to intercede (e.g., through live monitoring and whisper coaching, by sending the agent suggestions via chat, etc.) or join the call.

3. **Next best action/real-time guidance:** Provide your agents with the steps or actions they need to answer a question correctly, complete an inquiry or perform a transaction, leveraging AI's understanding of what has worked successfully in the past. In some cases, this includes delivering a knowledgebase asset that your agents can use while the call is still in progress.

4. **Up-sell/cross-sell opportunities:** Identify callers who are well-suited for up-sell/cross-sell opportunities, as well as the specific offer for your agents to present to the customer. Real-time analytics can pick up the nuances of a conversation, identify the appropriate offering, and provide instructions or a script for the agent to follow to complete a sale.

5. **Sales/collections effectiveness:** Recommend rebuttal wording or suggested verbiage to overcome objections, as well as detecting pace, tone, intensity, and other factors that help your agents maximize their sales and revenue collections efforts.

6. **Productivity and efficiency:** Keep your agents on track by directing them through targeted conversations that minimize non-productive time, while providing guidance to help them complete customer requests efficiently.

7. **Immediate reinforcement:** Identify "good" behaviors to encourage positive actions agents should continue to cultivate or discourages practices that should be corrected right away.

8. **Coaching consistency:** Deliver coaching content systemically to ensure the same message is communicated consistently to all agents, regardless of their team or supervisor.

9. **Employee engagement and gamification:** Recognize and reward your agents for outstanding performance. Encourage and motivate them when they are in the midst of a difficult call by sending pop-ups such as an emoji or a chat. At the end of a customer conversation, the system sends agents rewards for a job well done.

10. **Analytics-enabled quality management (AQM)**: Provide real-time feedback for each component of a call so that your agents know if they are on the right track. This approach provides consistent positive and constructive feedback.

Strategy 5:

Infuse empathy in customer interactions

Far beyond the positive/negative binaries of sentiment analysis, your organization can use AI-driven analysis to understand specific customer emotions and coach agents to respond accordingly. Emotional insights can identify indicators like loyalty or churn-likely behavior.

According to a recent **Forrester study** commissioned by CallMiner, 68% of businesses agree that the call center has become the new empathy channel for customers, and 70% feel that agents are dealing with more emotionally charged situations than ever before. Emotion analysis can help with training and support to improve agent responses to these dynamic situations. Also, emotion analytics can monitor agent performance to identify patterns, helping agents develop the skills they need (empathy, politeness, efficiency) to reach better CX outcomes.

For example, paired with insight from sentiment analysis that depicts how the customer feels about something, your organization can use emotion criteria to build a more complete picture of **vulnerable customers** who might be facing financial or emotional hardships. Conversation intelligence technology can both identify these types of customers and equip your agents with the tools they need to respond accordingly.

To improve outcomes with customers, whether they've been specifically identified as vulnerable or not, your managers and supervisors can provide agents with:

- **Background information** on the customer, such as previous touchpoints, issues, personal information and more.

- **Direction** to ensure agents stay compliant, as well as recorded, objective documentation to respond to audits and complaints.

- **Meaningful and data-driven feedback** on their performance during the customer engagement to power improvement and learning.

- **Post-interaction training** to support and drive better customer outcomes in the future.

3 tips for coaching empathy based on conversation intelligence data

1. **Create an "empathy map":** **An empathy map** helps your team better understand the customer and get clarity into their personal situations. Similar to a customer journey map, an empathy map describes what a customer is going through as they attempt to complete a task or overcome a problem. An empathy map could work well as a follow-up activity after agents have observed, interviewed, and engaged with a customer. Ideally, your team should answer questions based on the customer's perspective, rather than how the organization would like them to feel.

2. **Include understanding phrases in your customer interactions:** When a customer calls into your customer service center, it's the agent's chance to turn a potentially negative experience into something positive. Phrases like, "I know how frustrating it can be when this happens," or, "I am so sorry you're facing this problem," display empathy and let customers know that your team understands what they're going through. These phrases work best when paired with ownership, assuring that the agent will do everything possible to resolve the issue.

3. **Examine potential biases, even if they are unconscious:** We often have hidden and, at times, not-so-hidden biases that could interfere with our ability to empathize and listen. Most of these biases are often centered around visible factors like gender, age, and race. If an agent has a bias, even an unconscious one, towards a certain category of customers, it may come across as obvious during their interactions. Advise your team to always try to be as neutral as possible while dealing with different customers, treating every customer the way they'd expect to (or would want to) be treated.

Creating a culture of improvement and continuous feedback

Using the five strategies identified above, your managers and supervisors can create a culture of continuous feedback and coaching for your agents. These approaches are proven to improve retention, and help your agents feel valued and connected to your organization. Data-driven coaching rewards top performers, while nurturing those who require extra support. Most importantly, these techniques ensure that no one feels left behind.

Armed with the right AI-powered solutions like conversation intelligence, managers and supervisors can get granular with feedback, delivering it consistently and at scale. This consistency pays off, providing agents the information they need to excel in their careers. The results not only build team morale, but also improve CX and other business performance outcomes throughout the organization.

About CallMiner

CallMiner is the global leader in conversation intelligence to drive business performance improvement. Powered by artificial intelligence and machine learning, CallMiner delivers the industry's most comprehensive platform to analyze omnichannel customer interactions at scale, allowing organizations to interpret sentiment and identify patterns to reveal deep understanding from every conversation.

By connecting the dots between insights and action, CallMiner enables companies to identify areas of opportunity to drive business improvement, growth and transformational change more effectively than ever before. CallMiner is trusted by the world's leading organizations across retail, financial services, healthcare and insurance, travel and hospitality, and more.

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