

New Tips for Agent Training and Coaching

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As contact center leaders look to create more innovative and productive business practices heading into 2022, few concepts are more important than empowering agents through training and coaching. The radical workforce shift that initially served as a response to the pandemic will soon be more stable in the contact center industry, while leaders attempt to continuously improve operations over time. The result will be higher customer standards, a more competitive customer service landscape, and a greater pressure to successfully coach and empower agents.

According to CCW Digital research, 75% of contact center leaders claim that many of their employees will remain working from home, while others create flexible, hybrid work arrangements centered around employee preferences and operational efficiency.

Work-from-anywhere has undoubtedly become a long-term staple as employees claim that they want remote work to continue, simultaneously proving that they can be even more productive in a remote or hybrid working environment.

Physical location and workforce dynamics may vary slightly depending upon organizational factors such as the day of the week, or what letter the last name of the agent begins with, as well as more important factors such as the technology or office resources available, the preferences of individual team leaders or employees, the productivity levels of agents, and key performance indicators of employees.





"Recognize the fact that things have changed dramatically. When it comes to the whole work-from-home culture, it might be the front-line, the team leads, the managers, the directors, it might be everyone working from home depending upon how you arrange this. Role model the behaviors you want your managers, directors, and team leaders to show. Build connections with them, show the support for them, but also ask them to go and focus on employee engagement." –**Mike Aoki, Trainer/Speaker on Sales, CX & Customer Retention, Best-selling Author**

However, prioritizing agent training and coaching as the backbone of the contact center operation should never be compromised as a result of remote or hybrid working environments. In fact, prioritizing agent training and coaching should (and will) become even *more* important and successful in work-from-anywhere or hybrid models, *if* leaders are able to overcome lingering challenges that continue to undermine agent engagement and productivity.

Understanding How Remote Work Changes Coaching Dynamics



"In the physical connect center agents felt like there was always someone to turn to, if they needed to know anything, they can turn to the left or right and chat with a fellow agent or reach out to the supervisor for guidance. In the work-from-anywhere world, agents may feel lost when they are struggling with something as they feel like there's no one to turn to. There's nothing more frustrating than not knowing something, feeling your supervisor doesn't see your struggle, and not knowing where to turn."

-Yitzy Tannenbaum, Head of Product Marketing, NICE Performance Management

According to one annual [survey](#), one in five workers say their biggest struggle with remote work is the loneliness it creates. Other top challenges include communication, collaboration, and arguably most importantly, the ability for the contact center to improve individual agent performance.

46% of remote workers say the best managers are those who check-in frequently and regularly, according to the [Harvard Business Review](#).

Part of communicating effectively in a remote environment requires engaging agents. Employees who are engaged have the right tools and resources they need to communicate internally and externally, as well as leverage accessible information they need to produce desirable metrics and quality work. Addressing challenges such as isolation, communication, and individualized coaching in a remote working environment can have exponentially positive results in the contact center.

When working in a remote environment, agents and managers often have less access to "pulse checks" where they can read the room and determine if they need to coach or be coached. More robust desktops solve this problem by giving agents and supervisors a real-time, transparent window into their performance.

A remote agent's desktop has tools that encourage collaboration. "Peer coaching" has been a common practice in the physical contact center, but it's even more important that leaders encourage this in the remote world as well.



"What I learned in 25 years at being a practitioner, not only at Microsoft and Allstate... is that a lot of customer experience work can be very reactive. Companies that change how they terminally lead to be around customers' lives do so by embedding [employee] competencies." -**Jeanne Bliss, CCW Advisory Board Member, Author, Former CX Leader at Microsoft**

Quality training and coaching in remote environments also require performance management through a wealth of available metrics – on quality, CSAT, and productivity, in such a way that agents, supervisors and c-suite executives work with the same data, visualizations and insights (each appropriate to their access level).

With centralized and integrated information, supervisors and agents gain a better understanding of the impact of specific behaviors on performance. They do not need to be business analysts to determine what might be improved through coaching, as such an approach creates clear, consumable guidance as to what – and who - needs attention.

When done correctly, remote work can increase employee productivity, creativity, and morale. Creating a team environment where employees are engaged, continue to take part in training, and are rewarded and incentivized will be key to the success in contact center operations. Coaching will play a critical role in making this a reality. Through insights, analysis, and best practices, this report will show you how.



Discern New Customer Behavior Trends that Impact the Contact Center



"Being reliable, and approachable, and accessible. All of these things are an indication to your customer of how much you care, which at the end of the day, is the best thing we know that bonds employees, and customers, and companies, and grows their business organically. What's important is to recognize how to calibrate all of these things." -**Jeanne Bliss, CCW Advisory Board Member, Author, Former CX Leader at Microsoft**

As contact centers work to prioritize the right strategies and adopt new coaching methods and technology resources, the performance standard continues to rise. According to CCW Digital, 60% of consumers care more than ever about the customer experience when making purchasing decisions. But so too has the expectations of employees, as mentioned earlier. This, in turn, creates a need for a higher-caliber agent. Today's agents are being asked to solve more difficult problems, while delivering faster, more efficient, and personalized service. They also have to demonstrate empathy and build lasting relationships with consumers who have heightened expectations *and* more options to take their business elsewhere.



"Robotics have shifted the role of the contact center agents. Today, people speak to a human only in case where :

- A. The issue is time-sensitive
- B. The issue is complex

If this issue is time sensitive, agents need to show high levels of empathy and consideration. When issues are complex, agents require a comprehensive and deep understanding of the subject matter." -**Yitzzy Tannenbaum, Head of Product Marketing, NICE Performance Management**

Since the pandemic, 82% of consumers have become more comfortable using digital channels, according to CCW Digital research. In both scenarios mentioned above, consumers will turn to human support when self-service is not equipped to fully handle the inquiry, making the agent's role more difficult. A human agent may also be responding to digital channels, which requires more soft skills in digital channels, thus facing the challenge of engaging in meaningful conversations over text.

The solution that many contact center leaders are beginning to understand is the need to empower their agents with a blend of resources, including actionable data and soft-skill training, so that they can focus on listening and responding to consumers instead of reading irrelevant and mundane scripts, looking up customer history while customers wait on hold, or navigating data silos.

Higher-performing contact centers (as measured by customer feedback, CSAT, CLV, and of course, revenue) are more likely to proactively supply agents with learning materials to make their time more useful. Whether the scenario calls for training soft skills, peer to peer communication, or through technology, high performing contact centers automatically initiate or recommend personalized steps agents can take to meet objectives, as well as how they can respond when they don't.



Although the importance of actionable data and effective coaching is more important than ever, many companies struggle to sufficiently empower their agents. This struggle allows costly customer experience pain points to endure.

According to CCW Digital research, excessive waiting again ranks as the most common pain point in the contact center, with a staggering 68% of consumers saying they often wait on hold. Alarming, this percentage actually exceeds the 2020 figure of 56%, which was gathered at a time when pandemic resourcing issues and digital inexperience should have been far bigger factors.

Other common pain points — all similar to those reported in 2020 — include difficulty finding the right agent or system for their issue (53%), the need to repeat information (43%), and a requirement to use self-service prior to reaching a live agent (43%).

Growing comfort with digital channels is obviously a positive sign, but it does come with the potential cost of more complex journeys, requiring better agent training, coaching, and data aggregation. If companies do not put the right intelligence in front of their agents, these pain points will only become more intense and costly in the years ahead.



Empower Agents by Leveraging Actionable Data in the Customer Journey

A successful coaching initiative is part of a broader ecosystem of contact center technologies, drawing actionable intelligence from all touch points and enterprise systems. Armed with this intelligence, companies can better measure the efficacy of their training and resources. They can also uncover which agents require additional guidance (and in what areas), thus opening the door to more personalized, action-oriented, and ultimately effective coaching.



"In today's world it's not enough to coach to 'raw' KPI's (e.g. AHT, FCR), but we also need to identify gaps in behavioral KPIs (e.g. empathy, cutting a customer off), and coach to help the agent improve there, these results prove effective in improving customer satisfaction." -**Yitzy Tannenbaum, Head of Product Marketing, NICE Performance Management**



Consider the following use cases:

- Assess performance from afar and therefore improve the quality and personalization of coaching. Melding data on KPIs, metrics and observed behaviors at the individual and team level will help identify the root causes of problems in the agent and customer journey, underpinning important performance metrics.
- Give managers, coaches, and team leaders a better window into what customers are actually experiencing, which can lead to better overarching training for individual agents and the team at-large.
- Guide agents in real-time, thus minimizing the need for exhaustive coaching up-front, allowing agents to get up-to-speed faster and/or in less desirable environments.

Of course, all important data, goals, and progress toward goals should be stored in a single location. This becomes increasingly important when your workforce is not in the office, in person and desk drop-ins are no longer an option. Given the rise of distributed work and unorthodox scheduling, it is important to democratize the data. Regardless of their physical location, all relevant stakeholders should have seamless access to the same set of actionable intelligence. Modern technology augments the process, surfacing real-time improvement opportunities to those involved in the coaching process.

Plan and Document Better Coaching for the Future

As contact center leaders look to rebound from an all-hands on deck mentality over the last year and a half, it's important to create and plan out training and development sessions for agents and coaches that will have a lasting impact moving forward.

One way to do this is to take time to make sure that coaches have everything they need to be successful by preparing for coaching and training sessions in advance. Just like coaches can prepare for sessions, agents should too. Consider having sessions that are prescheduled, creative, shorter, and more frequent. For example, consider three ten-minute sessions instead of one 30-minute session. More frequent touchpoints can help ensure that agents feel connected and part of something bigger, improving engagement, morale, and productivity.



"In recent years we've seen coaching evolve from the generic one-to-many classroom. Agents don't want to sit through long coaching sessions. Contact centers are looking to mini coaching ('snack size') that are short and to the point (10-15min). In the remote world, agents want to take the coaching at the time that best fits their schedule, so we are seeing a lot more 'on-demand' coaching." **-Yitzy Tannenbaum, Head of Product Marketing, NICE Performance Management**



Preparing for coaching sessions does little good for contact center agents and coaches if insights are not documented. Documentation is essential to helping leaders understand what worked, and what did not, for which agents. Of course, a single repository is critical to understanding the impact.

Which agents thrived or struggled? Which coaches excelled or needed assistance? Rather than popping by an agent's desk to share advice, the supervisor in a remote environment is reaching out online, which makes it easier to document the coaching interaction and learn from results. Some organizations have also opted to record coaching sessions to help supervisors self-analyze and improve their coaching skills.



"Typically [team leaders] are giving out information. And the agent is listening to it, but there's no interaction or interactivity. And the team leader will ask at the end of the session, 'does anyone have any questions?' And after twenty-nine minutes of not saying a word, agents are not suddenly going to pipe up with a bunch of questions." –**Mike**

Aoki, Trainer/Speaker on Sales, CX & Customer Retention/ Best-selling author

Consider encouraging interactivity and two-way communication through individualized role-playing sessions. For example, some training scenarios work better for new hires, while other modules are more effective with experienced agents.

Remember that best practices are important for coaches, too. Collaboration between coaches has always been a challenge, but it becomes progressively important in the remote environment. Give coaches vehicles for sharing their own best practices and struggles.

Utilize Gamification for Recognizing Employees and Improving Engagement

When agents are working remotely, recognizing and rewarding their behavior becomes more difficult. Many tactics can be ineffective and feel like a chore. Instead, consider leveraging more creative gamification to keep agents motivated. This may include highlighting successes in leaderboards and team contests, as well as letting agents showcase their knowledge in trivia contests and other enjoyable challenges.

Consider the following ways gamification can be used to increase coaching effectiveness, employee engagement, and motivation:

Trivia – multiple choice questions where agents are rewarded points for correctly answering the questions. Trivia can also be used for remote team-building; instead of simply quizzing agents on scripts and products, coaches can ask fun questions about their peers.

Pursuits – allows coaches and team leaders to break up complex performance objectives into smaller, more tangible levels. Agents receive points after reaching each level and will begin to see their lofty goals as more achievable. For example, if a supervisor tells an agent to lower their AHT by 30% within three months, chances are, the employee will feel lost and give up. But if the goal is broken up into small weekly goals, such as lowering AHT by five seconds each week, coupled with points can be awarded to an agent who achieves each weekly goal, this agent will feel that they can achieve each weekly level and will incrementally work towards 'winning' and receiving the points.

Leaderboards – agents can receive personal badges for completing one/multiple pursuits/trivia, reaching a certain milestone, or achieving a certain number of points. An agent can also see how they compare to the rest of the team, encouraging friendly competition, and highlighting standout performers who can become role models and mentors for their peers.

Marketplace – Employees can redeem points for a gift. The gift can be physical gifts (i.e. headphones, water bottle, company swag, etc.) or value perks (i.e. priority shifts scheduling, a designated parking spot, extended lunch break, etc.). The marketplace allows supervisors to encourage agents with positive reinforcements.

When it comes to gamification, make sure that the reward is meaningful. Consider asking agents what they find valuable and incorporate their recommendations into your gamification quests.

And if, for example, a leader uses gamification to increase sales of a particular product or service, be certain to note the start and end date for the program so you can monitor the impact your program has on the promotion.



Measure the Value of Agent Engagement and Coaching Efforts



"How will we unite and orient what we do together, what we measure together, and how will we define success, to be the customers' goal being achieved. That's really the big shift... is uniting the different parts of the organization." -**Jeanne Bliss, CCW**

Advisory Board Member, Author, Former CX Leader at Microsoft

One of the most notorious challenges of agent engagement and development initiatives is the ability to measure success. Many contact centers have defined coaching programs but lack the ability to connect them to overall improvement, agent engagement and productivity, or any other return on investment. In identifying the ROI, consider the following tips:

- Draw correlations between frequency, content, best practices, contests, and improvement in a metric.
- Determine through analysis the difference between your employees in the second and third quartile of performance. Statistically, this is where your coaching efforts can make its biggest impact.
- Translate improvements to dollars saved or dollars earned to articulate the value of the program. When situations arise requiring "all-hands-on-deck," executive leadership needs to understand what "cancelling coaching" can mean financially.

Although many organizations have been forced into this work-from-home state due to a global crisis, it will have lasting implications for the future of our contact centers. Whether your future contact center workforce model will be primarily remote, primarily on-site, or a legitimate hybrid between the two, a focus on coaching and agent empowerment will help you achieve meaningful success even as the customer experience standard rises.

About the Author



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Matt Wujciak is a market research analyst, writer, and marketer for CCW Digital, the #1 global online community and research hub for customer contact and customer experience professionals. Matt's work has been featured by a number of different publications and NYT and WSJ bestselling authors, Forbes council members and contributors, and C-level executives from fortune 500 companies.

In his role, Matt interviews bestselling business authors and executives from brands such as Nike, Dow Jones (WSJ), Microsoft, Apple, Verizon, Adidas, Under Armour, Lyft, IBM, Salesforce and more. He is known in the CX media world for his industry-leading research and reports, articles and case studies on CX, consumer behavior, UI/UX, digital marketing, performance optimization, customer service, and brand strategy. He also speaks at live events and produces podcasts, webinars, and online events for CCW Digital and associated client brands.



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