IMPROVING HOME-BASED AGENT PERFORMANCE THROUGH QUALITY AND COACHING COLLABORATION

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About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

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The need for a tightly coordinated effort between quality and coaching teams has never been more in demand as more organizations are transitioning their employees to work from home. As customer expectations intensify and competitors are quickly responding to market needs, contact center leaders are seeking new strategies to elevate agent performance to improve KPIs like CSAT, AHT, and more during the transition.

To meet the unique demands of work-from-home agents, a five-step quality and coaching collaboration model provides a systematic approach to drive sustained agent performance improvements. When this model is applied appropriately, the quality team can help to transform the coaching program with relevant and timely information that supports business objectives and empowers agents to be successful and seek improvement no matter where they are located.

This whitepaper outlines a five-step process to facilitate a partnership between the coaching and quality teams and enable results-oriented coaching.
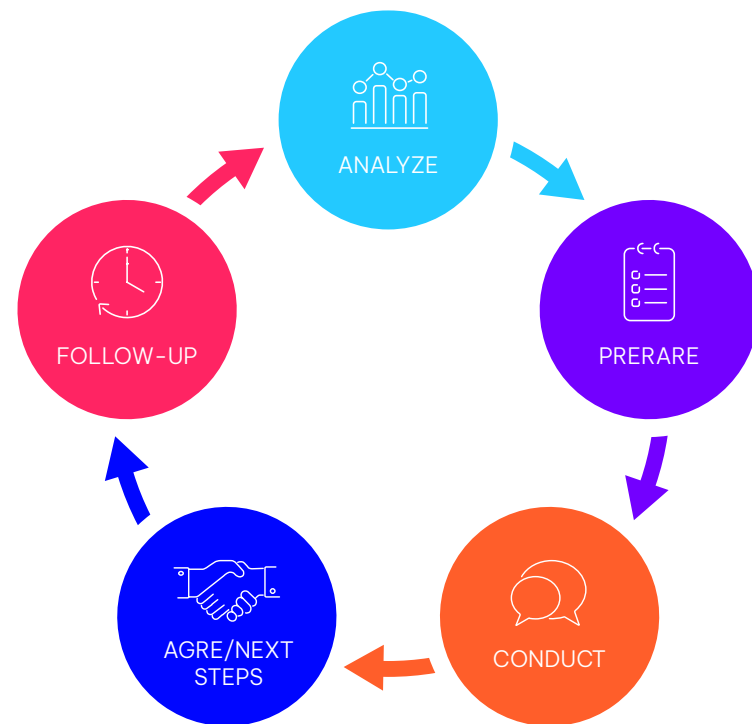
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1. Analyze and Assess Performance

Most contact centers evaluate calls based on a series of questions that are not tied to a specific outcome. The evaluation form can include a checklist of procedures to follow and a rating of soft skills exhibited on a call which are difficult to interpret accurately. While this approach ensures that coaches cover general performance metrics, it may not in fact change the right or intended metric.

Coaches need to have confidence that if agents are being rated on specific questions, an improvement in their score will translate to an improvement in a key metric, such as customer satisfaction. Likewise, when agents lack clarity on feedback, they have little motivation to change. This situation is amplified for work-from-home agents who will also feel a sense of isolation without any face-to-face interaction from supervisors or team members. Quality and coaching should instead collaborate on evaluations so that they focus on the behaviors that empower agents to be successful as well as praise agents that have excelled on their performance.

Make business goals central to performance assessments

Start by analyzing the behavior of top-performing agents and identify the behaviors that contribute to their success. Then analyze the agents in need of improvement; it's likely that they aren't exhibiting those behaviors linked to successful performance. Artificial intelligence (AI) predictive analytics models such as NICE Enlighten with Quality Central will identify and score behaviors for you more efficiently and accurately than manual listening and interpretation and present the results in easy-to-use supervisor and agent dashboards and reports. Use findings from the analyses or artificial intelligence (AI) behavior models to modify or develop new evaluation forms.

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Leverage 100% monitoring of interactions for quality

Assessing agent performance using a random sample typically means that only several interactions per agent per month out of potentially thousands will be selected for evaluation. This approach to quality monitoring fails to leverage enough data or the right type of interaction data for effective coaching discussions.

Leveraging AI analytics models to monitor 100% of interactions is a method for providing more precise results than random sampling. For agents that are transitioning to work from home, 100% monitoring using analytics can identify distractions or extraneous noise that employees didn't face while in the office. For example, analytics can detect silence, talk over and additional noise in a home. With 100% monitoring, contact centers can:

- Score every interaction based on what was said (or not said) on the call and agent behaviors.

- Focus evaluations on the interactions that scored low based on a metric that you are trying to improve.

- Coach the agents on a behavior that drove a low KPI, such as demonstrating ownership.

- Compare how agents are performing in these key areas before and after

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the transition to a work-from-home environment to identify additional coaching needs.

When organizations are empowered to analyze the right interactions and as many interactions as possible as a part of evaluations, outcomes—and the behaviors needed to achieve them—become the impetus and the core drivers of the coaching program.

2. Prepare for Coaching with Best Practices

Once organizations uncover the metrics or goals in greatest need of improvement and understand what an agent needs to change or modify their behavior, it's time for coaching and quality teams to prepare for an agent's coaching session.

It's important to keep in mind that every agent learns and is motivated to change in a different way. By adapting to an agent's unique learning style, contact centers can multiply the impact of coaching. Consider which of the three learning styles an agent falls into:

- **Visual:** Agents who are visual learners learn best by seeing and would benefit from demonstrations, charts, graphs and dashboards. Video-based coaching sessions will help home-based agents that are visual learners to retain information and feel a connection to their job.

- **Auditory:** Agents with this learning style learn best by hearing and would prefer to listen to recordings and engage in discussion.

- **Kinesthetic:** Agents who are kinesthetic learners take in new information best by taking action, such as coaching that includes roleplaying, self-assessments and hands-on practice.

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Quality

Teams can support performance improvement by putting the right information in coaches' hands.

- **Identify behaviors.** Evaluators should pinpoint specific behaviors for coaches to influence. It is ideal for quality teams to leverage automated reports, charts and immediate insights from personalized dashboards to make the process as easy as possible for the coach. This could mean delivering reports for coaches to review and in turn, potentially work with the quality team to adjust the evaluation form to align with business objectives.

- **Prepare a coaching form.** Tie coaching sessions to the contact centers' quality evaluation system so coaching efficiency can be calculated easily. Providing remote agents and coaches with the same information will enable a more productive discussion.

- **Provide a way for agents to share feedback.** Quality programs must also include a way for agents to share feedback, such as self-evaluations completed before coaching sessions. Automating this process with quality management tools provides a systematic mechanism for collecting this information efficiently.

Coaches

Prepare for one-on-one sessions by leveraging best practices and drawing on quality insights.

- **Target discussions.** By concentrating on just one or two behaviors in each session, coaches can target discussions and avoid overwhelming agents. It is better to increase the frequency of the coaching sessions so that agents can better retain the information. This discussion can take place with work at home agents using a video conferencing tool.

- **Review takeaways.** Coaches should prepare to review takeaways from previous coaching sessions with agents. This allows the coach to confirm whether an agent has completed the tasks he or she was assigned.

- **Garner agent buy-in.** Agents are the ones whose behavior must change, and their buy-in is critical to achieving results. Coaches can elicit buy-in by encouraging feedback on the process and the interactions highlighted in the discussion. This empowers agents to become active participants in coaching program development.

3. Improve Conduct Through Education and Trust-Building

One of the biggest adjustment for agents transitioning to a work-from-home environment is how coaching is delivered. No longer are side-by-side coaching meetings or in-the-moment coaching sessions possible. Organizations now have to plan coaching carefully and rely on video, email and chat for communication.

A safe and supportive coaching environment is especially conducive to improvement for at home agents; quality teams can support coaches in implementing many of the most effective methods. Some coaching best practices include the following:

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- **Avoid using words like "you" and "why":** Coaches should avoid confrontational, personally directed language such as "you" and "why." For example, avoid questions such as "Why didn't you take that action on the call?" Although coaches are trying to understand the agent's perspective, the question can come across as antagonistic.

- **Enable open dialogue:** By asking open-ended questions, like "How did the call go?," "What went well?," and "What could improve the call?," coaches can gain additional perspective from agents and engage them in the coaching process. For agents that have recently transitioned to work from home, you can include open ended questions about their experience or challenges. The questioning process helps agents self-analyze and self-identify solutions that help them improve.

- **Provide examples:** Empower agents to play an active role in the coaching session by sharing call recordings, reports, key trends and dashboards in advance. Quality teams can deliver this data at an agent level, allow agents to compare their performance to others in the organization, and develop a best practice library so agents can listen to high-performing examples. By giving agents meaningful insights and information, they'll feel prepared for the coaching session and gain a deeper understanding of where they need to improve.

- **Roleplay:** Help agents practice for calls and instill new behaviors by using coaching sessions to act out potential scenarios.

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This both empowers success and makes agents feel that coaches are partners in their achievements.

- **Celebrate success:** Don't let improvements go unnoticed. Congratulating agents on their progress reinforces the work they've put in and starts to create a positive loop of continuous improvement. Quality teams can encourage agents who have improved their skills and ensure that coaches are aware their performance gains by reporting on successes.

4. Agree on Next Steps

When coaches wrap up a session, they can ensure that agents are aligned with the actions they need to take by setting goals for agents to focus on ahead of the next session. Every goal should be SMART, or:

- **Specific:** Be as specific as possible in goal-setting to make coaching actionable for agents. For example, if an organization is focused on sales, this could include offering the right promotion or delivering the value proposition. Tangible actions such as these make it easy for agents to change their behavior.

- **Measurable:** Choose goals that can be tracked through the evaluation form or improvement to a specific metric.

- **Attainable:** Give agents goals that are within reach. It's unlikely, for example, that an agent with a 50% customer satisfaction rating will be able to jump to 80% after just one coaching session. Break larger goals into realistic pieces so agents feel that their goals are achievable and provide opportunities to celebrate as they improve.

- **Relevant:** Ensure that goals are aligned with the organization's objectives, with every goal tying back to a result the organization wants to achieve.

- **Timely:** Connect each goal to the agent's recent performance, not how he or she was performing several months ago. Goals

Once goals are identified, agents and coaches can work together to develop an action plan to help the agent deliver on those goals.

should also be tied to a specific, near-future date for follow-up so that the goal remains pressing for agents.

Once goals are identified, agents and coaches can work together to develop an action plan to help the agent deliver on those goals. Coaches can provide suggestions to agents, such as listening to best-practice examples or trying different strategies during interactions. Then, coaches should garner a commitment from agents to enact the plan and have them summarize the meeting so both parties know exactly what the agent will work on before the next session.

The quality team's role in this process is primarily focused on empowering coaches to be as successful as possible. Quality teams should ensure that coaches have access to data that shows whether agents are delivering on their goals and provide a way to track and manage the incremental improvements agents make before and after they have transitioned to a home environment.

Incorporate goals, metrics and action plans into agents' dashboards so they can always see how they're performing.

5. Follow Up to Ensure Success

As agents begin working toward their goals, coaches should check in regularly to help drive results and keep goals top of mind. In many contact centers, coaching takes place

just once a month; for most agents, that's too infrequent to help them achieve their goals. Checking in shows agents that coaches want to help them be successful and that they are expected to deliver on the goals discussed. Following up doesn't have to come in the form of a full coaching session—it could simply mean:

- Email or online chat with home based agents to ask about their progress in between sessions.

- Ask agents to summarize the actions they've taken so far.

- Check in to see if agents are facing any obstacles that could be preventing them from achieving their goals.

As coaches follow up with agents, quality teams can support the discussions by tracking and reporting on coaching effectiveness and sharing insights into how an agent is changing their behavior. It's also likely that new insights will be needed as the coaching process evolves, and this could affect the metrics being tracked, what's needed from quality forms and more. Quality teams should remain open to adjusting their programs as new goals and needs emerge.

By working together, quality and coaching teams can revolutionize how coaching is delivered in the contact center. Results-oriented coaching taps into agent engagement to unlock higher levels of performance and create a culture that collectively works towards the most critical business objectives. It has the power to transform how agents view coaching and turn quality and coaching into drivers of agent satisfaction and retention.

NICE Quality Central™ is a next-generation quality management solution that provides a platform for coaches and quality teams to collaborate. It enables a quality program to more easily support work-from-home agents with automation capabilities and insight from monitoring 100% of interactions that evaluators and coaches can take action on. With Quality Central, contact centers can eliminate time-consuming manual activities and leverage data to tie evaluations, coaching and feedback to top business priorities.

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About NICE Quality Management

NICE Quality Central unifies fragmented, disconnected quality programs with different data sources into a single application that automates all omnichannel quality operations, from evaluation to feedback. It leverages the power of NICE Enlighten AI behavioral models, speech and text analytics and meta data, enabling every contact center to create an effective metric-driven quality program that improves agent performance and delivers exceptional customer service. Available on premise or in the cloud, Quality Central includes AutoEvaluate™ which delivers time-saving automation capabilities by automatically suggesting the answer to evaluation form questions and accurately scoring them.

To learn more, visit www.nice.com/engage/workforce-optimization/quality-management.

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