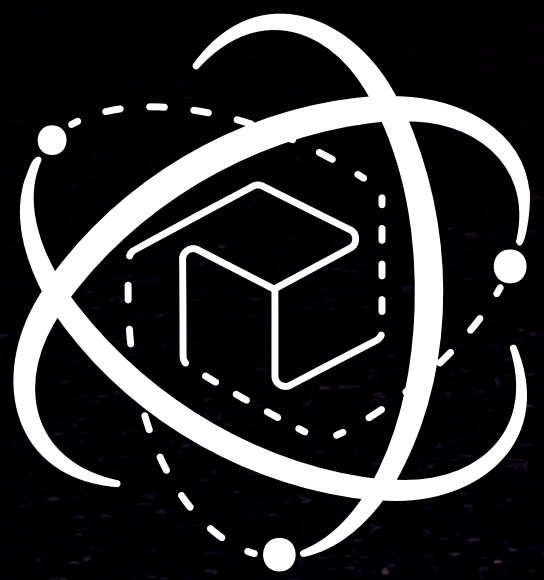


COACHING PLAYBOOK



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Introduction – Importance of Employee Coaching



The Contact Center Council surveyed more than 500 customer service leaders and asked, “**What is a supervisor’s most important role?**” **89% of those leaders responded “To Coach”.**

The irony is that organizations tout the importance of the supervisor-as-coach, and then give their supervisors very little resources and support. They leave their supervisors in the dark.



In a 2013 NICE Systems study, 78% of responding organizations stated that supervisors use data to prioritize people and topics for coaching. **But 64% of organizations admitted supervisors don’t spend enough time coaching.** They are spending time rationalizing data instead of spending time with their people.



Organizations can do better. We’ve seen hundreds transform their operation and results by transforming their approach to coaching. They move from quota-based (coach everyone twice per month) to targeted (coach specific people and topics) coaching. They hold employees accountable for improving, and supervisors accountable for delivering effective direction. **And they’ve consistently improved customer satisfaction scores 10+ points and reduced costs more than 10%.** You can too.



In this playbook, we lean on our experience and the best practices of our hundreds of customers to share a new perspective on coaching. We’ll walk you through:

- Coaching to Behavior (Instead of Metrics)
- Preparing the Coach’s Toolkit
- Assessing Coaching Effectiveness
- Designing Your Program

Help your supervisors do their most important job – coaching.

Equip them to be star coaches and get more from their teams. Let’s get started.



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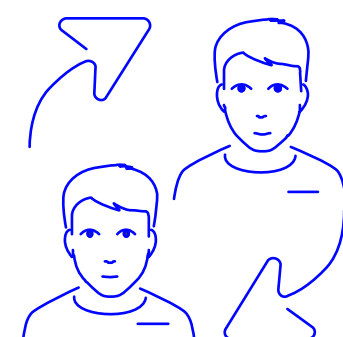
What is Coaching?

Connecting Metrics and Behaviors

Metric vs. Behavioral Coaching

What is Coaching?

First things first – let’s agree on a definition of coaching. In most organizations, coaching is simply scorekeeping. Supervisors and managers gather metrics, share them with employees and ask for better performance. Sometimes coaching is confused with cheerleading. A high five or pat on the back for a job well done is important, but it is not coaching. Our definition of coaching is more demanding:



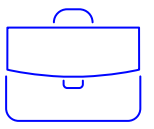
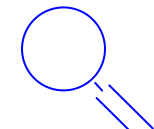


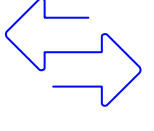



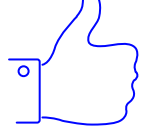

“Coaching is the process of improving results by changing thoughts, beliefs and behaviors.”

It is two-way communication that requires BOTH the supervisor and the employee be fully engaged.

Connecting Metrics and Behaviors

Most organizations coach to metrics rather than behaviors – “**What**” instead of “**How**”. Telling an employee to improve their Customer Satisfaction score by 5 points is VERY different from helping them show more empathy early in an interaction.

If you don’t know how an employee is behaving, it’s very difficult to make material, sustained improvements in their performance. And it’s near impossible to identify best practices.

What = Metric	How = Behavior
 Sales	 Effective Probing
 Average Handle Time	 Talk-And-Type
 Transfers	 Empathy
 Productivity	 Ownership
 Customer Satisfaction	 Creativity



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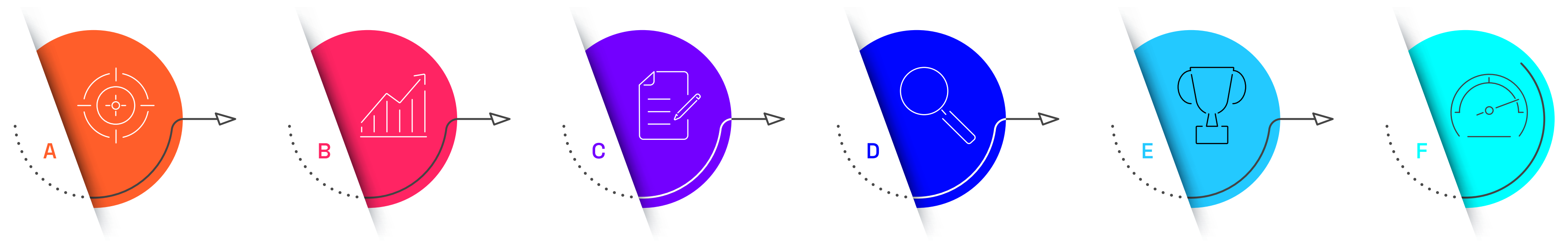
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6-Step Approach to Behavioral Coaching



6-Step Approach to Behavioral Coaching

A Identify Metrics and Set Targets

Leading organizations don't measure everything. They focus on the few metrics that (a) drive their business, and/or (b) connect with broader priorities.

B Segment Employees by Performance

Categorize employees by quartile on individual metrics and on balanced score. You need to identify 1st vs. 3rd quartile performers, so you know who to coach and what topic(s) to address.

C Set Coaching Strategy for Each Segment

Most organizations (and therefore supervisors) either adopt a one-size-fits-all approach to coaching or invest most of their time coaching bottom-quartile performers. This is a waste of time and energy. For the most impact, target 2nd and 3rd quartile performers with the potential to be top performers.

D Identify Behaviors that Drive Performance

Now you know which metrics matter, but what underlying behaviors drive those metrics? Use analytics to see what differentiates performers across quartiles. Then you'll know the behaviors of top performers that you need others to emulate.

E Motivate the Right Behaviors

Smart organizations don't simply throw rewards at people; they are thoughtful about recognition. They constantly adjust their mix of financial and non-financial (e.g. gamification) incentives to keep employees motivated. And they ensure recognition is explicitly tied to key metrics and behaviors.

F Measure Coaching Effectiveness

If an employee is not improving, is it their fault or is the supervisor an ineffective coach? Was the employee more effective under a previous supervisor? Organizations MUST hold supervisors accountable too—assessing their impact on employees versus their peers. You need to identify your top coaches so they can share best practices.

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Single Source of Performance Truth

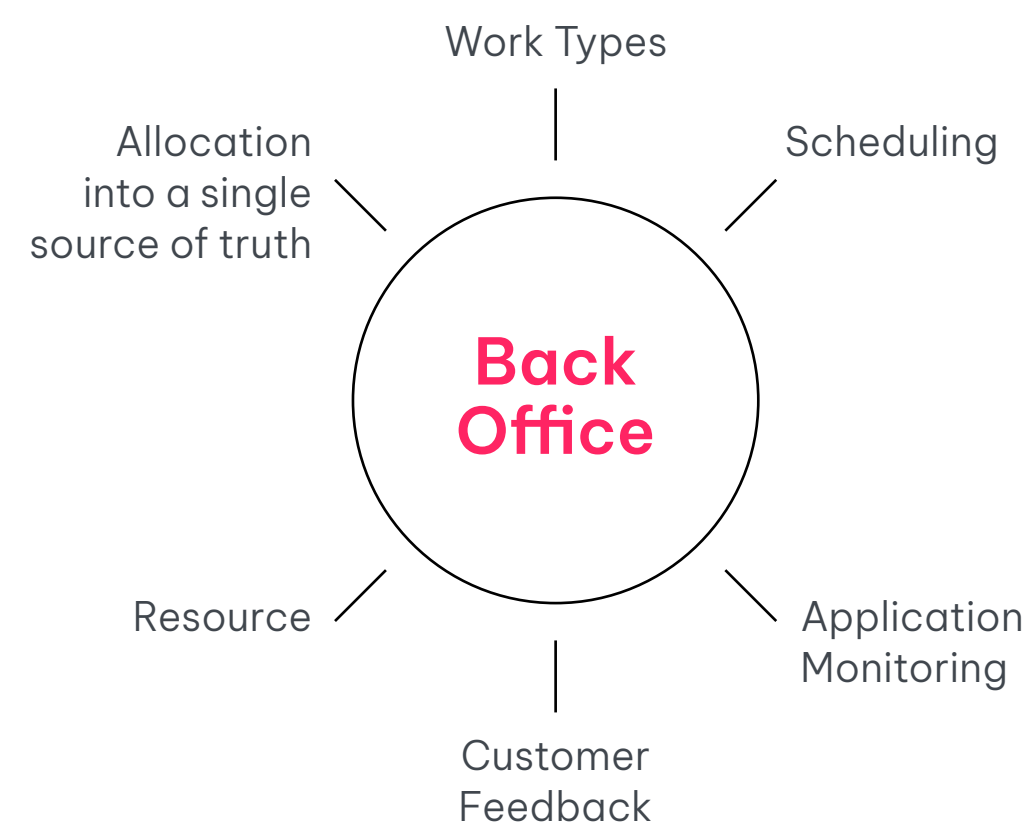
As mentioned earlier, supervisors spend too much time collecting and rationalizing data, and not enough time coaching. They need a transparent, single source of truth; one solution that aggregates data from across the organization (so they don't have to).

A single source of truth inspires confidence. Every manager, supervisor and employee needs to see the same goals and metrics to drive decisions and focus.



How to find technology that can serve as a single source of truth – a checklist:

- ✓ **Data integrity** - scrubs and cleans the data so you can trust it
- ✓ **Speed** - analyzes data and puts it at your fingertips in near real-time
- ✓ **Flexibility** - integrates with and aggregates data from multiple systems
- ✓ **Hierarchy** - maps your organization and delivers the right information to the right people
- ✓ **Measurement** - tracks everything, everywhere so that data follows people as they move about the organization
- ✓ **Workflows** - winds it around your processes so you can use the 'truth' to drive action



Radical Idea Alert!

Implicit in the 'single source of truth' is the idea that you can make every bit of performance data available to every employee every day. That takes some of the burden off the supervisor, because the employee can assume more responsibility for self correction.

Transparency changes the coaching conversation.

Previously, if an employee was in the dark with regards to their performance data, there would be more value in a supervisor sharing numbers. When both parties already have the numbers at their fingertips and there are no surprises, they can use their time to dig into underlying behaviors, beliefs and motivations. These are the kinds of conversations that help organizations change their culture.

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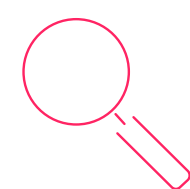
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Coaching Expectations

Our top-performing customers excel at setting clear expectations of their supervisors. Supervisors must own the coaching process by taking responsibility for five actions – analyze, prepare, conduct, document and follow up – before, during and after sessions:



Analyze

1. Before Session

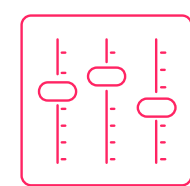
- Identify performance gaps
- Drill into the root cause behaviors behind each gap
- Prioritize the highest impact opportunities for improvement



Prepare

2. Before Session

- Set coaching session objective(s)
- Focus on 1-2 behaviors per session
- Plan the interaction, anticipating objections and preparing to overcome them



Conduct

3. During Session

- Ask questions to open the dialogue
- Share perspectives and insight
- Determine options to move forward



Document

4. During Session

- Set specific, measurable goals
- Agree on next steps—actions and timing
- Gain commitment



Follow Up

5. After Session

- Identify performance gaps
- Drill into the root cause behaviors behind each gap
- Prioritize the highest impact opportunities for improvement

Document Best Practices

As you systematically segment employees, the top performers will quickly become visible. Now, what to do with this group? You should be investing your time coaching 2nd and 3rd quartile employees with the potential to be top performers and encouraging top performers to share best practices and mentor their peers.

When you identify the behaviors that define your top performers, make sure to document those behaviors as best practices. Use these four tips to ensure you effectively capture and share best practices across teams, departments and sites:

1 Maintain a Library

We recommend you maintain a central Best Practice Library that all employees have on hand. Set the right example and equip them to self-correct.

2 Informal Sharing

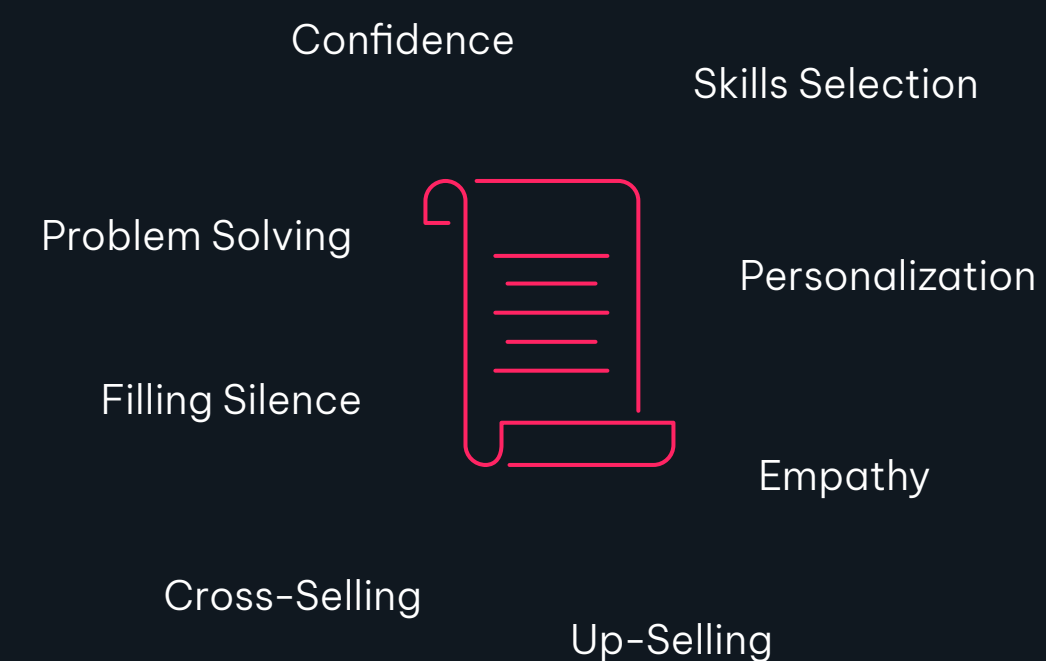
Love the formal library, but facilitate less formal sharing too—via wikis, message boards, blogs and other social channels.

3 Rate and Rank

Not all best practices are created equal. Allow employees to rate best practices (e.g. four out of five possible stars) or vote ideas up or down a leaderboard, just like they've done on Yelp, Amazon, Netflix, etc.

4 Motivate Contributions

Ensure you are getting enough best practices. Award contributions with non-financial incentives like preferred shifts, parking spots and gamification badges.



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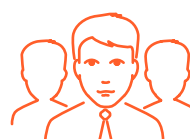
What is the Impact of Coaching?

It is critical that you measure the impact of your coaching program and of individual coaches. Here are four metrics that we have seen organizations use to track success:



Recipients

Are supervisors spending their time with the right people? Measure the percentage of coaching sessions conducted between 1st, 2nd, 3rd and 4th quartile performers. Make sure supervisor time is weighted to quartile 2 and 3, helping those employees advance to become top performers.



Improvement

Measure coaches on percentage improvements in key metrics. This is simply to ensure that their coaching time and effort is moving the needle.



Movement

One particular measure that we've seen work is tracking movement across segments. In a given time period, how many 3rd quartile performers moved up to be 1st and 2nd quartile performers? You want to be sure employees are moving in the right direction.



Events

Specifically monitor changes in employee performance following a coaching session (or series of sessions). Flag the event and see what happens. In the days and weeks following a coaching session on handle time, does handle time improve or does it suffer? Are your coaches clarifying or confusing the situation?

Where else will you see the impact of coaching? In our experience, organizations see higher employee satisfaction scores, higher retention rates (especially of top performers), improved revenue per contact, higher quality work / less re-work, and far better first call resolution.

Motivating Coaches

It is the supervisor's job to coach and motivate employees. Organizations need to do the same for their supervisors. There are plenty of ways to do this, including:



Coaching the Coaches

Invest as much in training supervisors as you do in training employees. This can range from formal training to simply capturing best practices in your central library and making them available to supervisors so they too can self-correct.



Career Pathing

Create plans through which supervisors can meet their career goals. Coaching and employee engagement must be critical elements in their path. Supervisors must understand that only great coaches rise through the organization.



Gamification

Applying game mechanics to work activities is here to stay. You can use money, perks, points, badges and more to reward and recognize great coaching. For example, reward supervisors when a wave of employees moves into the top quartile. Award them badges for vastly improving team performance on a specific metric or combination of metrics. Be creative and you'll find opportunities for healthy competition and collaboration.



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Objectives

It seems obvious, but in practice it rarely happens – set clear goals for your coaching program. Too many organizations coach for the sake of coaching – they are supposed to do it. Without clear targets or a sense of purpose, it is unlikely that real behavior (and results) will change.

Invest time upfront to set clear goals. That includes the specific impact you want to have on KPIs (handle time, adherence, retention, customer churn, etc.), and could include specific goals around frequency.

Schedule

To jumpstart your coaching program, you may need to set expectations around rhythm. That should get the ball rolling, and it's a great opportunity to show a segment-specific strategy. Consider the following schedule of expectations for every supervisor:

Performance Segment	1:1 Sessions	Side x Side	Top Performer Mentoring	Skill Building	Manager Time
New Hire	30 Min per Week	1 Hr per Week	30 Min Bi-Weekly	30 Min per Week	9 Hr per Month
First Quartile	30 Min per Month	30 Min per Month	None	30 Min Bi-Weekly	2 Hr per Month
Second Quartile	30 Min per Week	30 Min Bi-Weekly	30 Min per Month	30 Min Bi-Weekly	4.5 Hr per Month
Third Quartile	30 Min per Week	1 Hr per Week	30 Min Bi-Weekly	30 Min per Week	9 Hr per Month
Fourth Quartile	seems 30 Min per Week	1 Hr Bi-Weekly	None	30 Min per Week	6 Hr per Month



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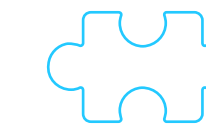
Maturity Model

Working with hundreds of organizations to define their coaching programs, we've seen them progress through stages of maturity. Review the below coaching maturity model. Consider where you are today and what separates you from moving to the next stage with your program.

	Operating	Performing	Leading
Segmentation Strategy	<ul style="list-style-type: none"> Manual Coach determined One-Size-Fits All 	<ul style="list-style-type: none"> Emphasis on mid-level performers Stack ranking (using a single metric) Balanced score (using multiple metrics) 	<ul style="list-style-type: none"> Mean-based segmentation Outlier management Self-regulation
Frequency	<ul style="list-style-type: none"> Set # of sessions per month Scheduled in workforce management 	<ul style="list-style-type: none"> Frequency based on segmentation 	<ul style="list-style-type: none"> Measured as part of coaching scorecard
Session Content	<ul style="list-style-type: none"> Emphasis on 1-2 KPIs per session KPIs chosen based on performance or at random 	<ul style="list-style-type: none"> Emphasis on 1-2 root cause behaviors per session Behaviors selected for impact on KPIs 	<ul style="list-style-type: none"> Measurable goals set for improvement of both KPIs and behaviors
Approach	<ul style="list-style-type: none"> Coach planned Coach facilitated Passive employee 	<ul style="list-style-type: none"> Employee self-assessment completed before session <p>Active employee in dialogue</p>	<ul style="list-style-type: none"> Employee self-assessment led; coach affirms and redirects Employee-defined improvement plan Coaching the coach
Follow Up	<ul style="list-style-type: none"> Continuity between coaching sessions limited 	<ul style="list-style-type: none"> Tasks and follow-up clearly defined in smart format Coaching feedback on progress provided within 3 business days of interaction 	<ul style="list-style-type: none"> Tasks and follow-up assigned and feedback given on continual basis Coaching sessions follow from consistent, ongoing coaching conversation

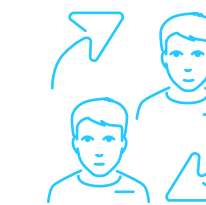
Approach / Next Steps

OK, so we've covered a lot of ground. Thank you for sticking it out. By now you know why behavioral coaching is important, you've worked through the six-step coaching process, and thought about how to measure impact. But where do you start?



Needs Assessment

Spend the time and effort to determine where your coaching program stands today, and where you want it to go. When the gaps are clearly identified, you'll understand the order of operations required to move forward.



Identify Enablers

Depending on those gaps, you'll need specific enablement. That can take the form of change management consulting, or perhaps a clear progression of training. You'll certainly want to look at how technology can help you achieve a single source of truth and support your coaching processes.



Build The Business Case

Often times it's hard to justify investments in coaching on the surface. There is not an explicit connection to hard dollar savings. So, you'll need to build the business case. Show how coaching returns customer loyalty and operational savings through more engaged employees. Create a burning platform for change.

We talked about the importance of coaching to behaviors (not metrics). We shared strategies for segmenting employees and a simple, repeatable coaching process. Finally, we talked about how to hold supervisors accountable for being great coaches.

It takes a lot to transform your supervisors into real coaches. But it's worth it, because it will transform your culture. **We would love to help.**

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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