

How Do I COACH AN AGENT



QM Manager

This topic is designed for QM Managers.

Quantify QM Coaching is used to assign coaching comments to QM Agents. This Quick Question topic provides QM Managers with an overview of using QM Coaching.

Coaching Best Practice

Current best practice for call quality monitoring and improvement uses a simple, targeted approach to coaching — that is, use specific, small, measurable tasks where agents can take ownership and improve performance. Quantify QM Coaching helps to do exactly this.

Of course coaching can be used in a multitude of ways to achieve very similar goals. For example, you can make simple comments/observations or assign very specific learning objectives. In general:

- **Be positive:** Coaching comments should be constructive to ensure a positive experience.
- **Be consistent:** In a similar way to designing an evaluation form and it's questions, you may want to discuss how to use coaching within your organisation so that all QM Managers can apply similar methods.
- **Be SMART:** Try to make sure comments are Specific, Measurable, Achievable, Relevant, and Timebound – SMART. This is especially useful when assigning learning objectives.

As part of the coaching process, you may also want to consider self-evaluation for your agents. Not all organisations like this approach, but it can encourage agents to take ownership and provide insight into their own performance.



" coaching is releasing a person's potential to maximise their own performance. it's helping them to learn rather than teaching them. "

Coach an Agent

You can assign coaching comments to individual agents using the evaluation form, and review coaching for your agents and teams using QM Coaching.

To use coaching:



1. To initiate a "coaching session" click the **Create Coaching Session** box next to a question in an evaluation form. Enter a description and click **Save** when you're done.

Depending on how you use coaching, we recommend that you try to be specific with your coaching comments and provide information on a remedial action. You can also make use of the **Notes** field for the question to provide information including attaching files and web links.

2. Once you create a coaching session, the agent will receive an email with details of the coaching comments (if an email address has been associated with the agent account). If you make use of agent licenses and allow your agents to access Quantify QM, they can also review their coaching sessions from their QM Coaching tab — a Quick Question document covering this topic is available for QM Agents.
3. As a QM Manager, you can review coaching for your team, or individual agents.
 - From Quantify QM, click the **Coaching** tab. To go to **Coaching** from your schedule, select **Load QM** from the **...** **Menu** in your schedule, and then click the **Coaching** tab.
 - Just like the **Performance Center** tab, click a team, or agent to see a list of all applicable coaching sessions.
 - The **Reviewed** column shows when your agents have reviewed their coaching notification.
 - Click the **Review** icon next to a coaching session to show the details.

Assigned Date	Reviewed Date	Reference	Comments	Action
05/05/2016 09:57:18		Mak/16/5	let's review this call together - it wasn't great overall	
05/05/2016 09:57:04		Mak/16/5/4	remember to say thank you for calling	
05/05/2016 09:55:16		Mak/16/5/3	let's work on handling this scenario better	
05/05/2016 09:55:03		Mak/16/5/2	you must read the guidelines on answering this question - the information you provided was wrong	

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