OBSERVE·AI

The Agent Performance Handbook

6 Steps to harness the power of AI services and advanced analytics to improve agent performance.

PREFACE /

Everyone learns differently.

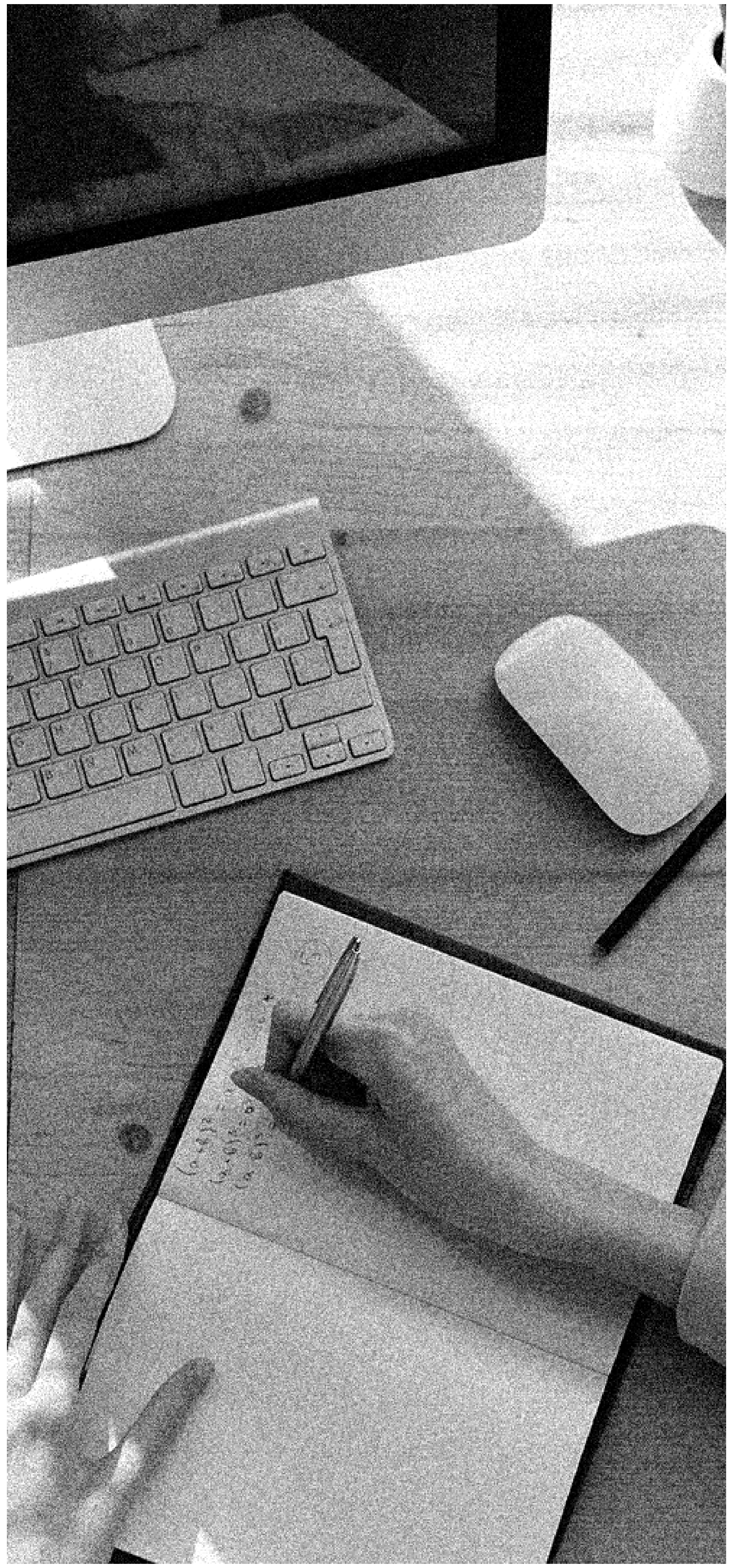
But the old way of doing things didn't account for that.

Agent performance programs were built around a one-size-fits-all approach. Coaching topics were chosen based on perceptions and anecdotes rather than raw data. It wasn't anyone's fault - they were making use of the technology and services they had available.

But times have changed. We've got a host of AI-services that have completely reshaped the way agent performance is monitored and improved. From 100% of calls being analyzed, to new topics being surfaced and recommended, to tracking progress overtime, we can do things we couldn't do before thanks to new technologies like machine learning, Natural Language Processing, and advanced analytics.

And that's what you'll see in this handbook. New strategies, new best practices, and new ways to improve those critical KPIs you're thinking about everyday. It's time to reinvent the way you drive agent performance.

Let's go!



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Why coaching matters

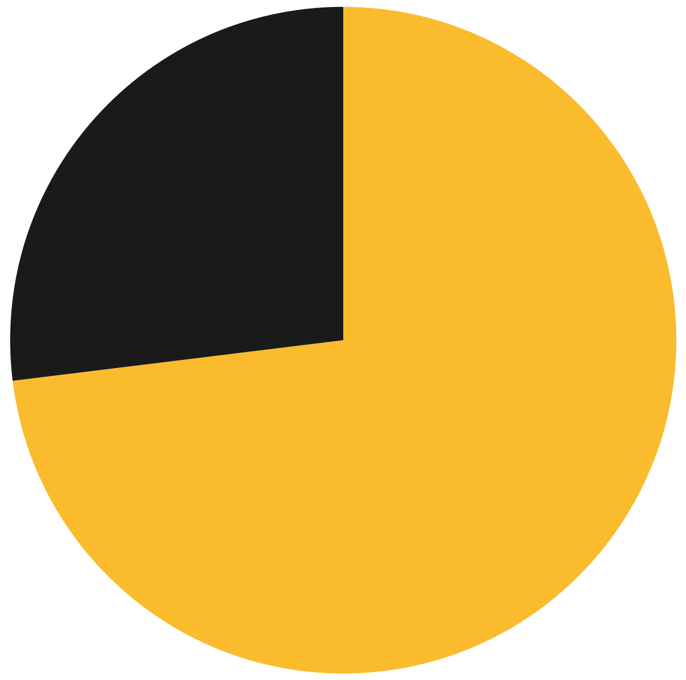
User expectations have never been higher. They want a world-class customer experience, and they want it now. With tons of competition a click or call away, focusing on delivering an ever-improving CX makes or breaks a business.

That CX relies on your agents on the frontline, the lifeblood of your customer interactions. Your brand perception, and in turn your customer acquisition and retention, rests in the hands of your agents.

It's wildly important. How you enable those agents to continuously improve performance is the underlying success metric for the world's most successful companies.

51%

of customers will never do business with a company again after just one poor service experience.



73%

of customers say that one extraordinary experience raises their expectations of other companies.

67%

of customers say their standard for good experiences are higher than they've ever been.

Training (the old way) vs. Coaching (the new way)

The old way of doing things we alluded to in the preface? That was training. The transformation we're witnessing? It's the move from training to coaching. Let's look at each to understand their defining differences.

THE OLD WAY
AGENT TRAINING

Planned: We'll do these trainings once per week

One-off: Now that we've held this training, onto the next topic.

Not personalized for large group settings: We need to train all of our agents on this specific topic.

THE NEW WAY
AGENT COACHING

Dynamic: Our curriculum is constantly evolving based on the market and our business insights.

Rapid: Rather than waiting for our weekly training, let's address this now.

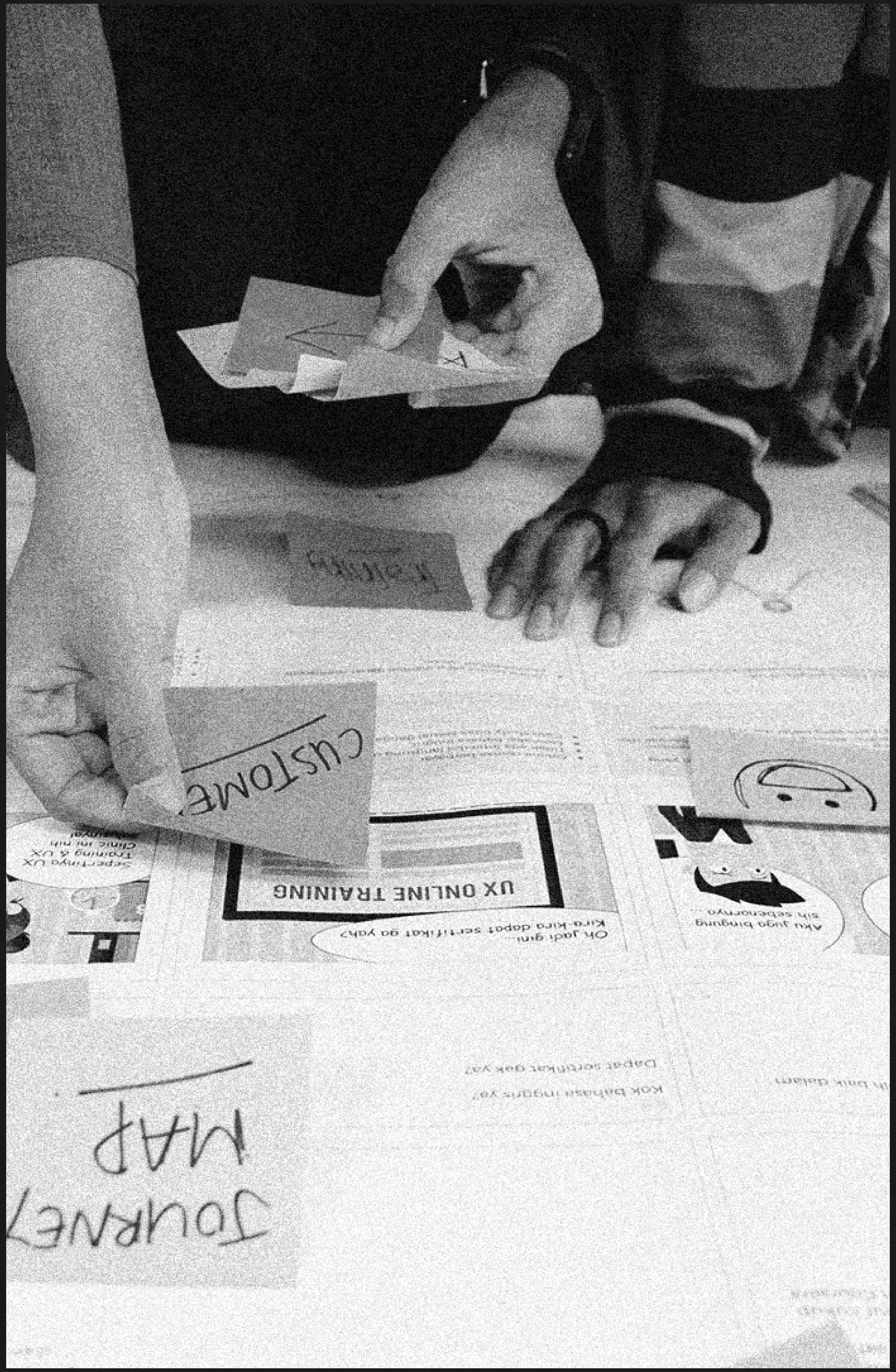
Collaborative: Let's work together with our agents to determine the root cause.

Personalized for 1:1 or small groups: Let's coach our agents in more personalized groups and tailor the sessions to what they need help with most.

The 6 step program for establishing and improving agent performance programs with AI services

"The best-in-class call center is one that is not run from the top down, but an interactive, agent level-driven call center. Agents are the best place to find what you're doing well and what you're not."

Dale Sturgill
VP Call Center Operations
EmployBridge



STEP 1 /

Get in the right mindset

Coaching is human. Your goal is to improve agent performance, their effectiveness at connecting and helping customers, and that's a very human business. It starts with the right mindset.

Raise self-awareness: Your agents on the frontlines handle a variety of customers daily. A great coaching program focuses its agent's attention on specific instances.

"Here's what the customer asked. Here's how you responded. What could you have done differently?"

Be proactive: Preparing for pitfalls based on past experiences is a great way to help agents navigate any issues that may arise in the future. Proactive evaluations, analyzing reports, and preparing the agents for similar issues are what a great coaching program delivers.

"Oh, this was a close call. What precautions can we take to effectively deal with the situation in the future?"

Be goal-oriented:
Agents are your best brand representatives and also closest to the customers. They can make or break brand perception. One of the biggest goals of a coaching program should involve molding your agents in a way that echoes the brand's core values.

"We want to ensure clients are met by a professional, knowledgeable, and friendly agent."

Be action-oriented:
Analytics-driven coaching programs help pinpoint blind spots in an agent's performance, that otherwise would've been missed. Designing customized sessions over a generic format that focuses on key problems is more effective in boosting agent performance.

"Let's talk about specific areas we can focus on to move closer to our goal?"

Be accountable:
Completing the feedback loop on a session by measuring the effectiveness of the program is equally important. Transparency and documentation play an important role here.

"We trust you to do what you say you will do."

STEP 2 /

Identify core use cases

With a finger on the pulse of every business interaction taking place, AI-enabled contact centers are capable of quickly creating new and adapting existing coaching programs to better enable their newly remote agents, enabling business continuity across their most critical business drivers.

What business driver is most important to you?

Business Driver	Coaching Use Case	Example Moments (Monitorable Interactions)
CSAT effectiveness	Improve agent-customer rapport by coaching agents on the most impactful empathy statements.	— Agent empathy — Customer sentiment
QA efficiency	QA analysts rely on automated QA evaluations to provide more targeted, frequent feedback to agents.	— Average handle time — Dead air — Hold time violations — Supervisor escalation
Compliance risk mitigation	Identify instances and coach agents on common indicators of fraud attempts.	— Mandatory compliance dialogues — Mini-mirandas — Fraud attempts
Agent performance	Coach agents on how to de-escalate a frustrated customer with empathy-related talk tracks.	— Talk track adoption — Negative sentiment
Growth opportunities	Identify what top performing agents with high conversion rates are saying and use it to drive coaching tracks for those in need of help.	— Conversion rate — Sales talk tracks — Brand standards

What is a Moment?

A Moment is an interaction that takes place on a conversation, identifiable by natural language processing. A Moment could be monitored by keyword phrase (eg. “Can I speak to your manager” for Supervisor Escalation) or an AI-determined event (eg. negative sentiment).

STEP 3 /

Set your foundations

When it comes to establishing out your agent performance strategy, a simple way to lay out your foundations is who, what, and how.

WHO
Identify

Utilize technology to get a full, accurate picture of each agent's performance. That includes identifying who is doing well, who isn't, prioritize, and monitor progress over time.

WHAT
Prepare

Eliminate the guesswork of coaching - and know the exact talking points and areas of improvement to focus on.

HOW
Coaching Sessions

With the relevant transcripts, evaluation forms, and coaching notes in one place, you can coach agents with context, personalized exactly to them.

HOW
Tracking

Remain proactive and consistent. Monitor progress, review the top areas of coaching, see results.

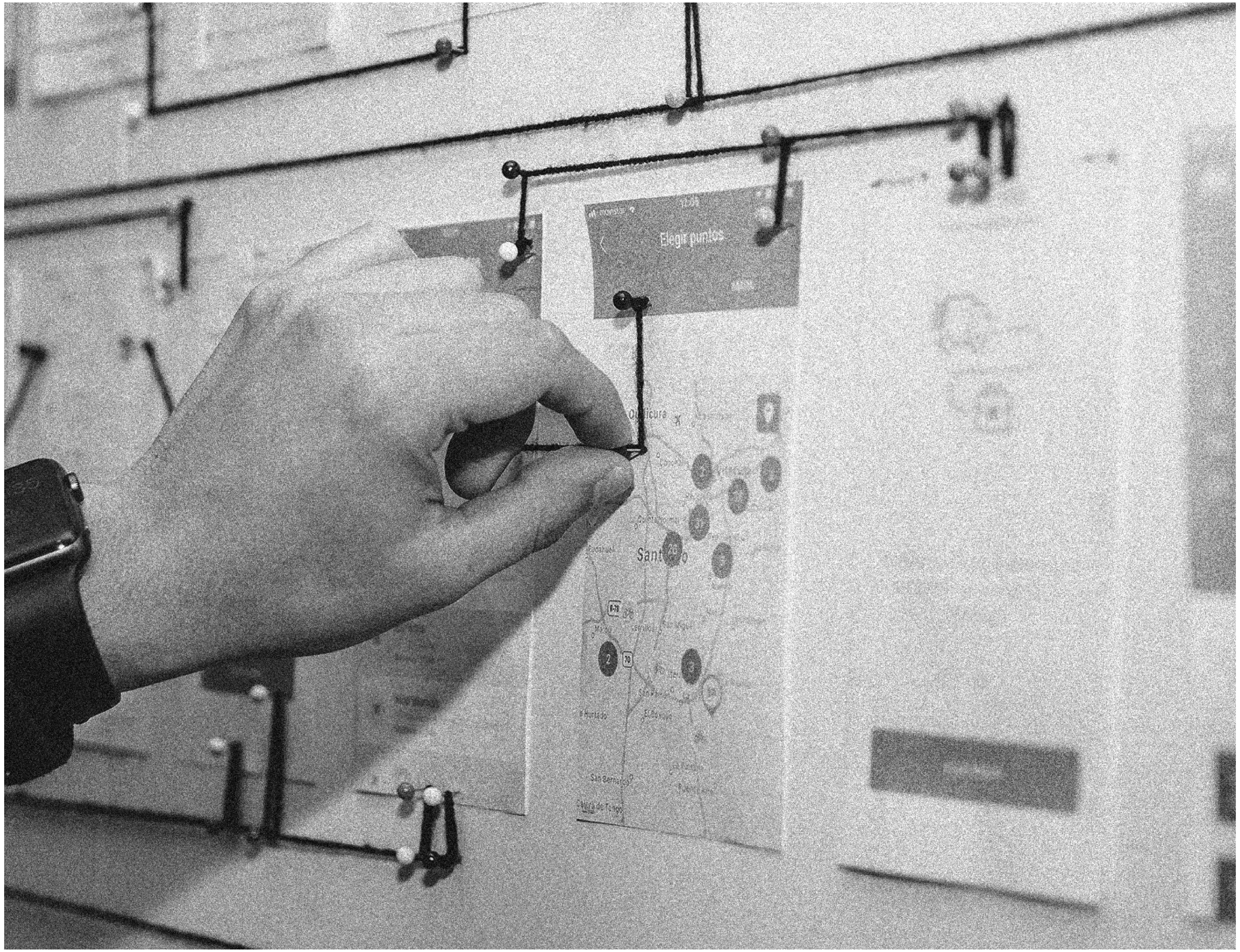
"One of the really cool things I hear over and over again from different team supervisors is they can address a couple things in the morning, and by noon they know if their team members took what they were coached on and have applied it."

Jason Davis, Chief Compliance Officer, ERC

STEP 4 /

Establish your coaching workflow

Now that your foundations are set, the next step is to apply them to your coaching workflow.



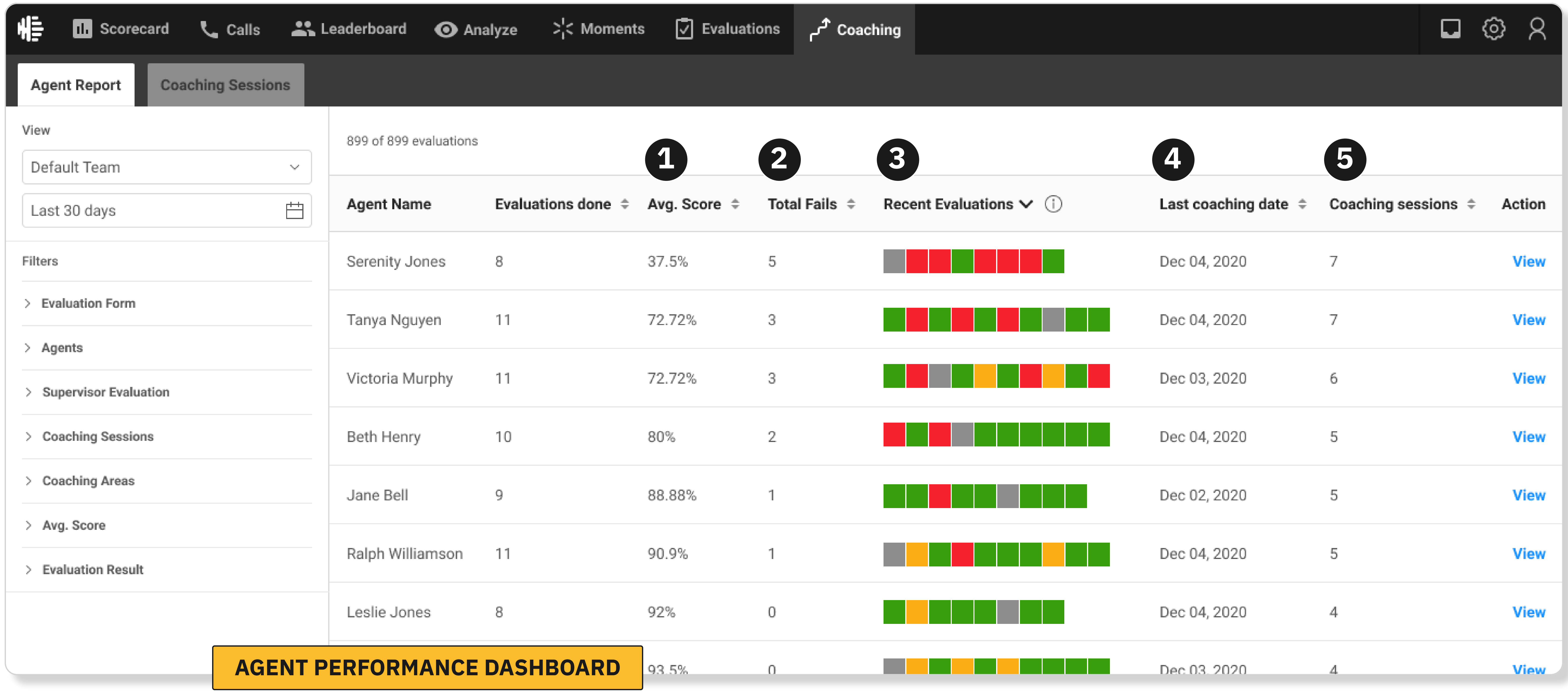
STEP 4 /
WHO: IDENTIFY

Goal:
Identify top and bottom performing agents across your team.

Strategy:
Base decision on data, not hunches by relying on speech analytics insights.

Tactics:
Agent performance dashboard: a visualization to understand <u>how agents are performing on each monitorable metric</u>.

Coaching triggers: <u>Surfaces what agents are in need of coaching</u> based on recent evaluation scores or time since last coaching session.



AGENT PERFORMANCE DASHBOARD

1. See who is crushing it, who is struggling
2. Prioritize who needs help first
3. Check whose performance has plummeted recently
4. See who was missed in the coaching cycle
5. Check if each agent has got the due attention

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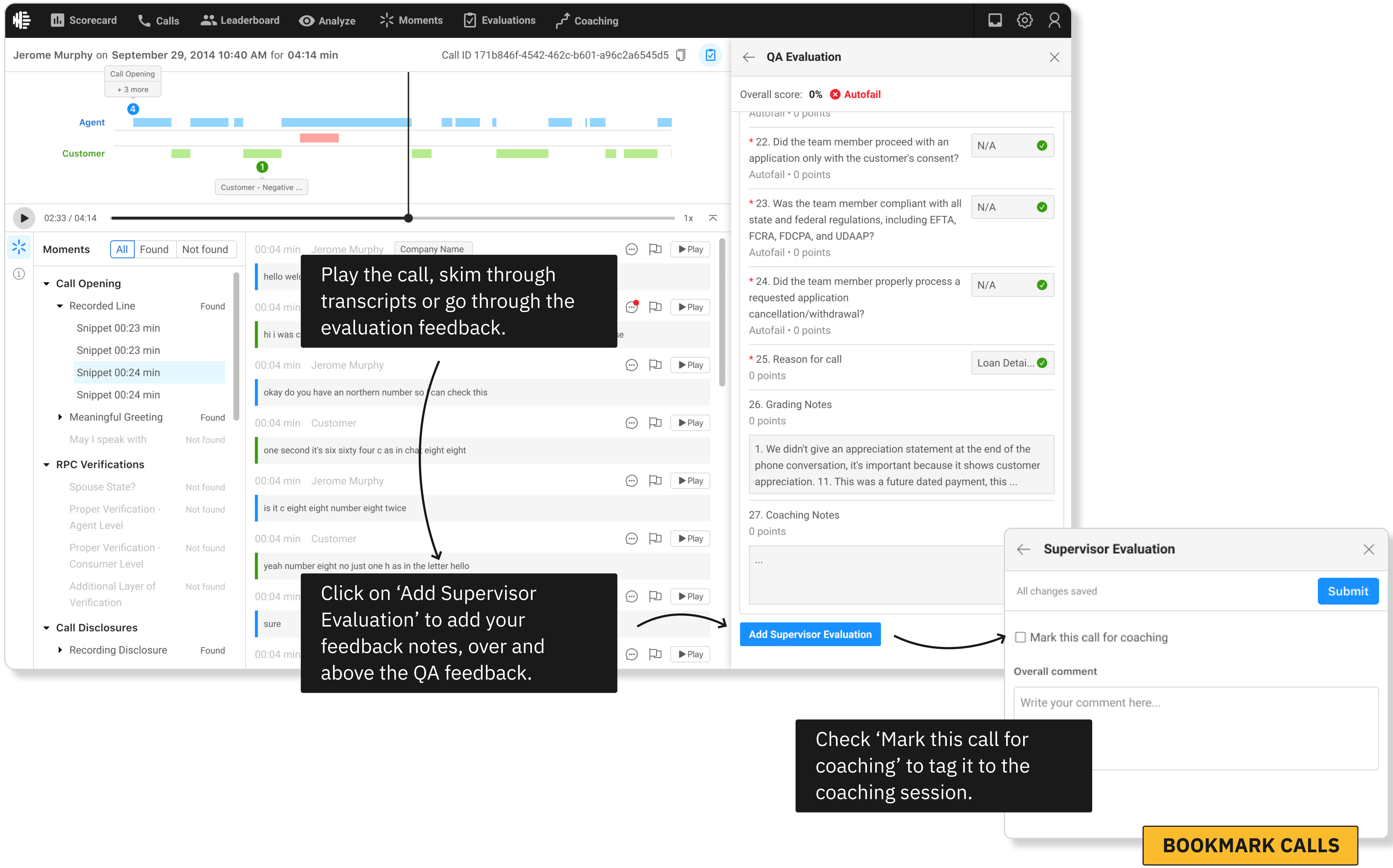
STEP 4 /
WHAT: PREPARE

Goal:
Focus on the right interactions and deliver targeted coaching based on improvement areas specific to each agent.

Strategy:
Personalize coaching conversations based on the needs and goals of individual agents.

Tactics:
Missed opportunities: see which skills and behaviors agents need to be coached on.

Trends: track agent performance on any key performance metric overtime.



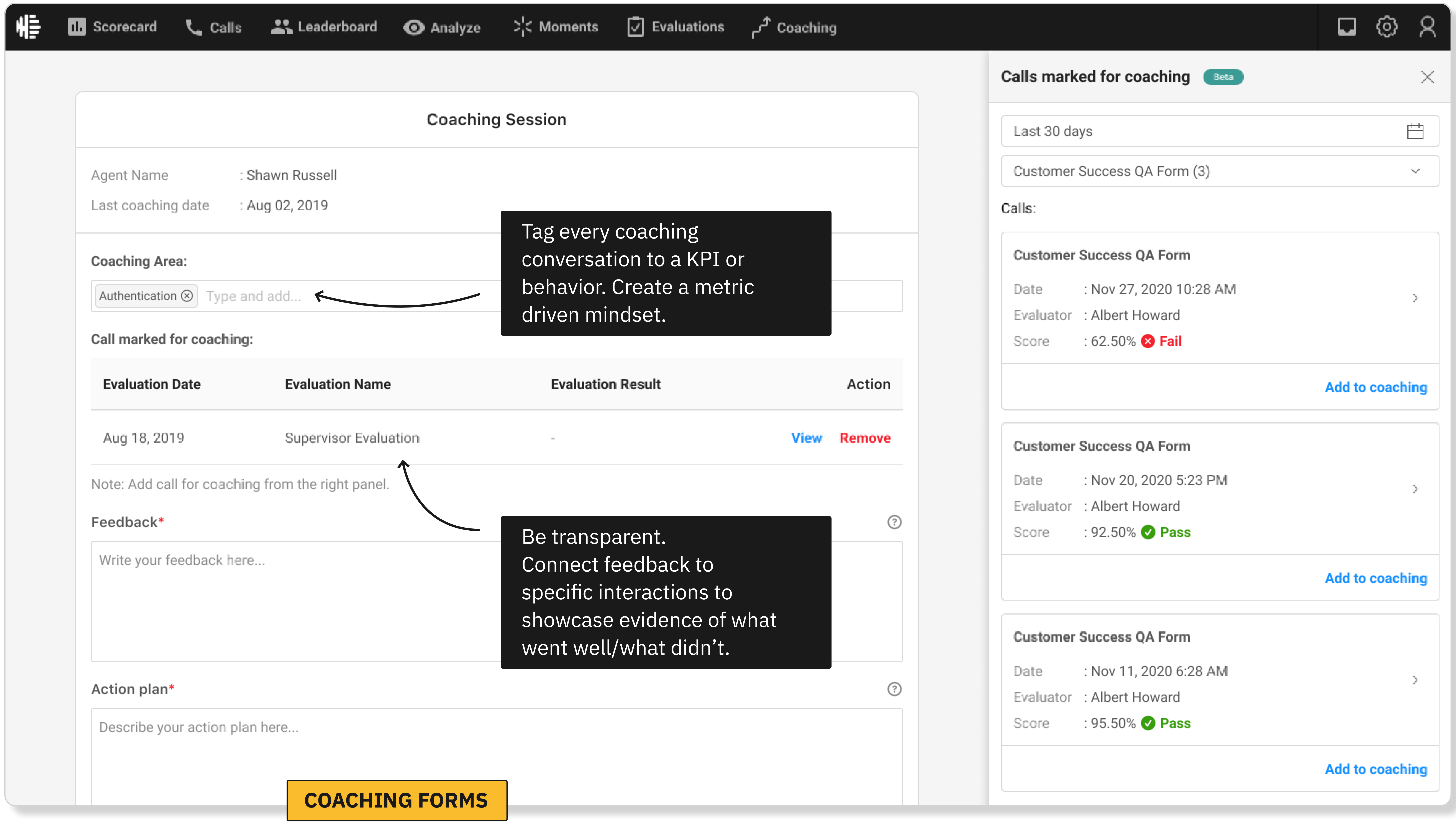
STEP 4 /
HOW:
THE COACHING SESSION

Goal:
Make your coaching session more consistent, measurable, and targeted.

Strategy:
Connect coaching conversations to operational KPIs or agent behaviors, and monitor how and where coaching is making an impact.

Tactics:
Coaching forms: create consistency in coaching sessions by using a single interface to deliver and document sessions.

Coaching tags: tag each coaching conversation to a KPI or behavior and monitor progress overtime.

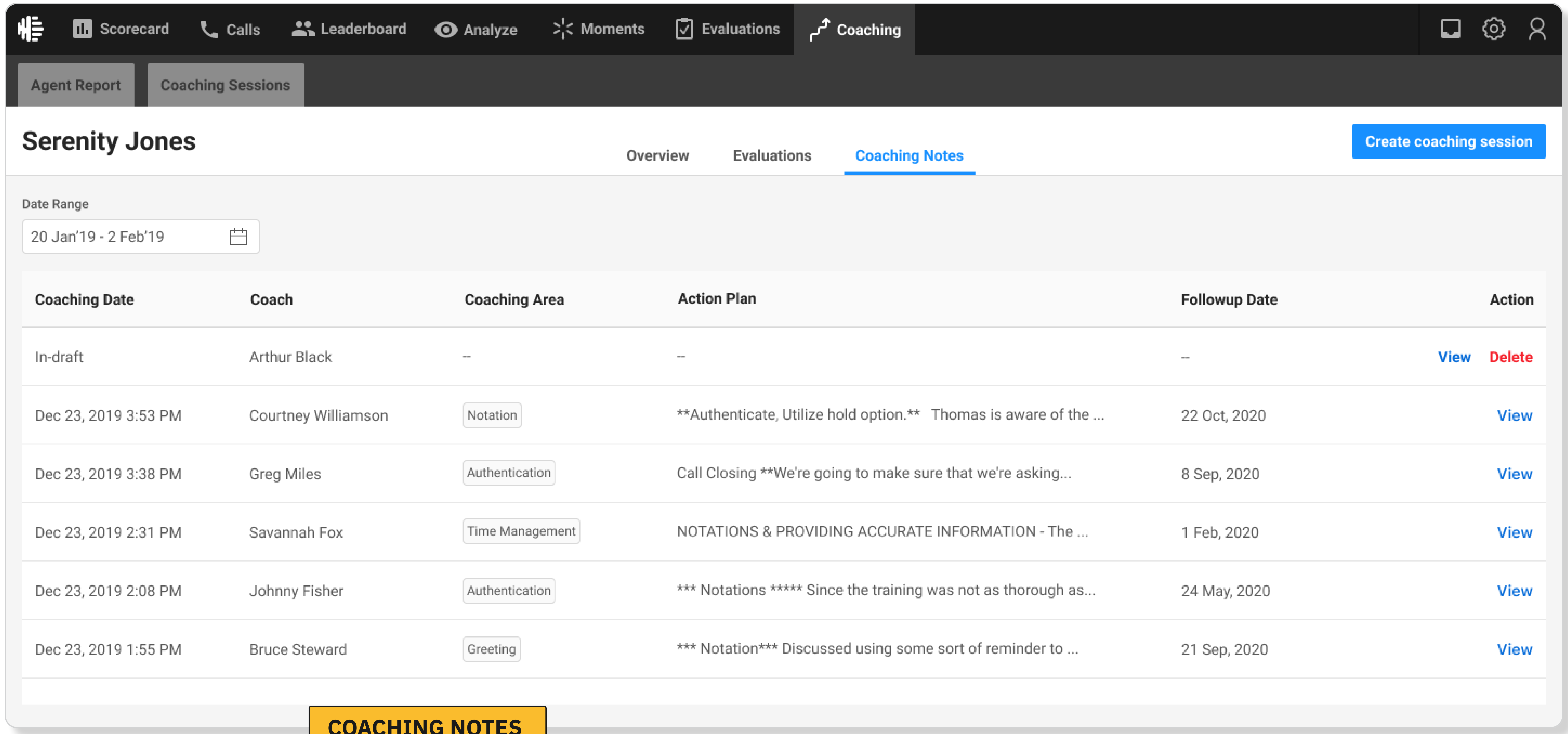


STEP 4 /
HOW: REPORTS AND ARCHIVES

Goal:
Monitor agent performance progress overtime

Strategy:
Maintain a history of coaching sessions and see how efficient and effective your programs are.

Tactics:
Coaching archives: track the development of each agent on each KPI and behavior overtime.



COACHING NOTES

STEP 5 /

Identify and avoid coaching pitfalls

Programs aren't personalized

Without 100% visibility into agent performance data, teams aren't able to custom tailor their coaching sessions to individual agents. This leads to a **one-size-fits-all training approach - holding sessions for large groups on a specific topic deemed most important**. That's failing to identify what areas are in need of improvement for each agent, engaging the agents that need more help, and risking repetitive, unnecessary coaching for top performing agents.

Sessions aren't reinforced with context

Coaching with context is critical. Agents need to **trust the feedback** they're getting, and reinforcing those detailed sessions with specific examples on the conversation transcript is how it's done. On top of the impact of the session, coaching with context also significantly reduces disputes between agents and supervisors.

Coaches can drive more transparency and trust if they can **easily pull out examples from the calls that this specific agent has taken with the customer** - such as being able to quickly listen to a specific portion of the call audio or transcript with the agent during the coaching conversation.

Sessions only focus on the what, not the why

Author Simon Sinek encourages organizations to **start with the why when it comes to determining and communicating their value proposition.** The same theory should be applied to every coaching session taking place: don't just tell an agent what they should do, but explain to them why they should do it.

Programs utilize too many tools

Simply put, **the more services and platforms analysts have to log into and toggle between to do their job, the less productive they'll be**. And that has a direct impact on coaching productivity. Data is in one place, transcripts and call recordings in another, coaching session history in a third. That means more integrations, which means missed data and frustrated analysts.

Teams lack a centralized record of performance

Often hand in hand with the previous mistake of having too many systems, **a lack of centralized record** means performance insights and data are spread across multiple systems, making it challenging to reference previous coaching sessions and monitor progress overtime. When discussion recaps are sent in an email, or submitted through a Google Form for example, upkeep is manual and paper trails are lost over time.

Programs are not adaptive

Coaching programs that don't **account for agent growth and evolve over time fail to make an impact** as time goes on. Adaptive learning fixes that.

Adaptive Learning is a computer-based or online system that modifies the presentation of training material in response to learner's performance. Adaptive learning uses interaction data to provide tailored and personalized training to each learner.

Adaptive learning, when supported by insights, enables teams to craft individual coaching programs for every agent. When coupled with contact center AI, adaptive learning creates the perfect loop for improving performance. It's real data on KPIs tied to learning objectives. **It provides the ability, with specific examples, to train agents on the most important opportunities and celebrate achievements.**

There's no standardized approach

One of the major underlying issues with contact center QA is the **manual scoring of customer interactions, and in turn, the different ways of coaching that stem from it.** The decision of what conversations to analyze and evaluate is a very different experience based on who the supervisor is. That means different feedback given to agents from supervisor to supervisor. The result is inconsistent coaching programs for every agent, and a lack of visibility into the effectiveness of those programs.

Coaching is reactive rather than proactive

Timing is everything, and the longer it takes to coach an agent to correct a behavior or clarify a gap, **the more damage that issue can cause.** This is especially critical for coaching on compliance - where a single violation can lead to suspension of operation, stiff penalties, or loss of brand reputation. Targeting coaching must be delivered when it matters most - immediately.

Teams aren't celebrating achievements

We've heard many of our customers tout the belief that **EX = CX**, and if employee experience is poor, the customer experience suffers as a result. Only focusing on coaching on clarifying and correcting, rather than taking the time to celebrate agents doing great work doesn't do an organization any good in boosting agent morale and employee satisfaction.

Teams aren't monitoring the success of their training programs

To track the success of a coaching session, you need to **know who was coached on what, when, and the metrics and behaviors that the coaching session has impacted.** Without any sort of coaching archive (specifically at the agent level), there's little visibility into what coaching sessions have taken place overtime and how measurable KPIs have been improved. On top of that, as agents move from one team to another, managers don't have the repository of coaching notes to simplify the handover.

“Employee Experience = Customer Experience.”

Shurland Buchanan
Chief Learning Officer
itelbpo

STEP 6 /

Enhance your programs overtime

Now that your agent performance programs are up and running, it’s critical to continue to improve your programs overtime (just like your agents).

1. Rely on QA evaluations to drive more impactful coaching sessions

On-the-spot coaching:
When you’re able to do your evaluation side-by-side with your call transcript and call recording, you can pinpoint the exact moment you want to coach on, allowing the agent to see the behavior that needs correction.

Detailed coaching:
Citing specific instances, QAs can provide supervisors direct notes for agents, backed with additional resources, allowing supervisors to more clearly convey feedback to agents.

2. Utilize micro-coaching for rapid feedback (and be proactive!)

Get agile with coaching programs. If there’s an issue, address it immediately and don’t let it get worse over time. The agent may not know it’s happening.

Quickly pinpoint an area where one agent or a small group of agents need assistance and train them with bite-sized content.

For example, perhaps a supervisor notices that some agents have not adopted mandatory compliance dialogues - this must be addressed immediately, no time to wait.

3. Identify and coach on the empathy statements that work best

With keyword phrase monitoring, paired with sentiment analysis, you can see what phrases lead to positive results. This information can be aggregated and used for team-wide coaching sessions.

“The speed in which we’re able to react to what’s happening is critical, and we continue to aim to reduce it. Take a scenario where an agent is coached on compliance days (or up to a week) after an evaluation is completed. There could be severe fatal errors in that time period that need to be addressed, that simply aren’t.”

Neal Topf
President, Callzilla

4.
Encourage peer coaching programs

You already know your top performers. Encourage them to take part in peer coaching, small group trainings, or 1:1 virtual trainings.

Additionally, roll out new training content featuring top agent's go-to talk tracks and call snippets.

5.
Celebrate achievements - don't just course correct

With so many insights for every agent, you have the opportunity to not just course correct behaviors, but celebrate the great work your agents do. Leaderboards showcase your best agents, and arm you with data to truly celebrate their successes.

Root Insurance's methods for more impactful remote coaching:

Root
Insurance Co

BEST PRACTICES TO **DRIVE MORE ENGAGEMENT** FOR VIRTUAL COACHING

More frequent check-ins to see if everyone was tracking.

Google quizzes to ensure everyone grasped the information they'd just received.

Break-out discussions over Google Hangouts to apply the information with peers.

Digital shadowing of more seasoned agents.

Targeted micro-coaching sessions for seasoned agents who needed to adopt new talk tracks and processes overnight due to the shifting nature of COVID-19.

Wrapping up and looking forward

Only 13% of executives in HBR research say they are "very effective" in delivering a personalized and seamless customer experience. (source)

Yikes. We can do better than that. And as you've gathered from reading through our handbook, there are proven ways to do it.

By approaching agent performance with a data-driven, personalized, transparent, and consistent approach, the pay off is huge.

→ Less time on data aggregation, more time coaching
→ Less agent attrition, more agent engagement and retention
→ Better performance across all contact center metrics and KPIs
→ An ever increasing NPS

Many of our customers tout: "employee experience = customer experience."

Ready?

About Observe.AI

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Observe.AI, a leader in Contact Center AI, transforms customer experiences and improves agent performance by helping top brands analyze 100% of calls and chats while streamlining quality assurance workflows. With Observe.AI, businesses transcribe every interaction with high accuracy and coach agents while gaining full visibility into their customer interactions. Observe.AI brings the power of agent assistance, automatic speech recognition, and Natural Language Processing (NLP) to modern contact centers and their frontline teams.

Observe.AI is trusted by more than 150 customers and partners, including Root Insurance, Alcon Laboratories, Tripadvisor, and Pearson. Backed by Menlo Ventures, Next47, NGP Capital, Scale Ventures, Nexus Ventures, Emergent Ventures, Steadview Capital, 01 Ventures and Y-Combinator, Observe.AI's headquarters is in San Francisco with an office in Bangalore, India.

For more information, visit www.observe.ai