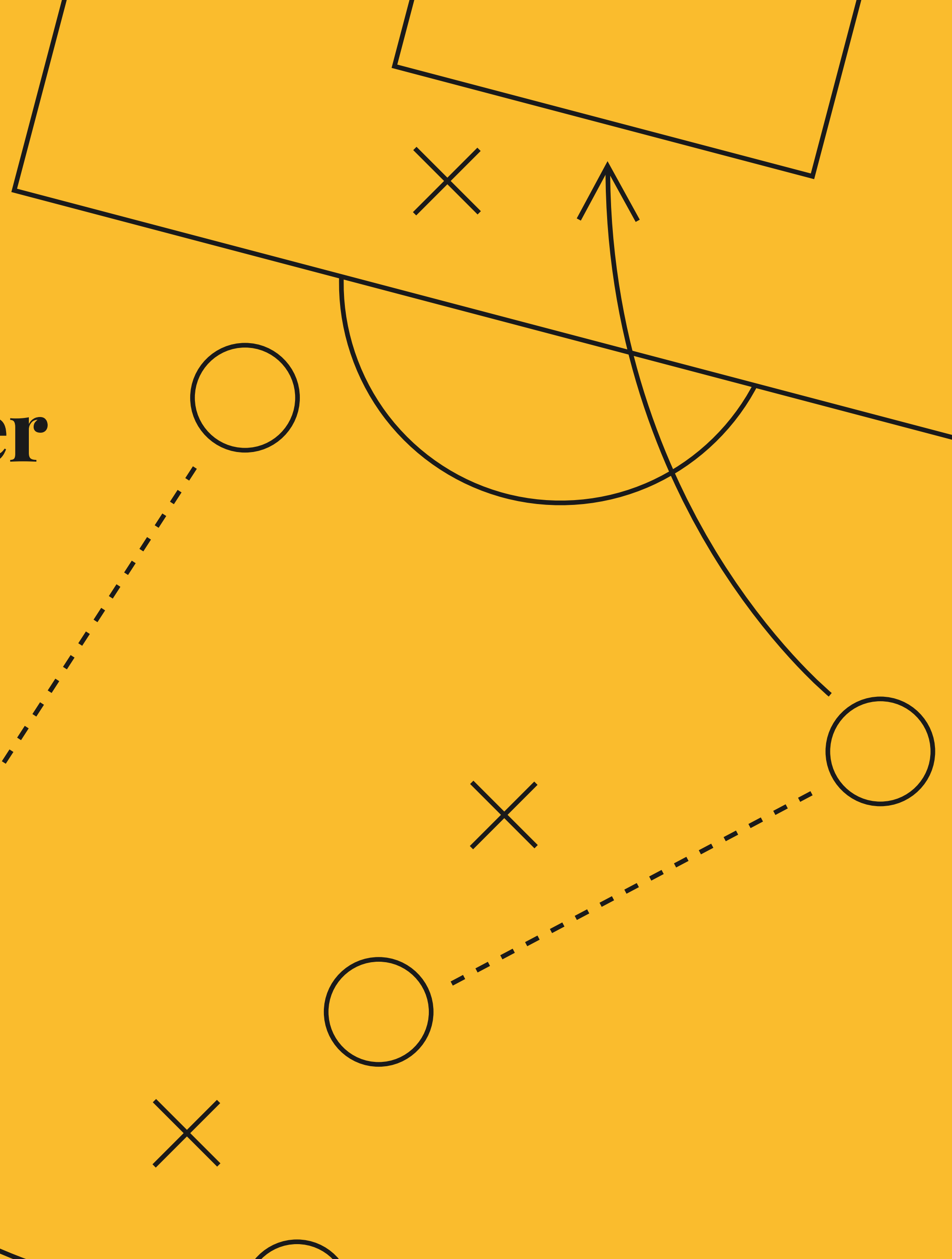


EBOOK

# **Analytics-Driven Coaching: The New Era of Contact Center Performance Management**

How to build resilient coaching programs in the new world of work and bring out the best in every agent.



INTRODUCTION /

# The shift to remote work came fast

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For unicorn insurance company Root Insurance, the shift to remote work came quickly. [Really quickly.](#)

*“We decided to make the switch to work from home overnight. We went from everyone in the office to 97% of our company working from home. That’s a massive shift in a short amount of time,”*

said Chad Hudgins, who leads quality and training for more than 150 customer support agents at Root Insurance.

According to Gartner, this shift is here to stay. In a recent survey, Gartner reported 82% of company leaders plan to allow employees to work remotely to some degree in the future, and nearly half (47%) said that they would allow all

employees to work remotely full-time going forward. As a result, coaching, especially for contact center teams, must undergo a digital transformation to account for the coaching challenges that are exacerbated in remote environments.

Contact centers across the globe shared this experience. Agents were moved from on-site to their living rooms, and with it, a swath of new challenges arose --

**from protecting customer data, to ensuring consistent customer experiences, and even maintaining company culture.**

But one of the biggest casualties of the transition is agent coaching programs. The old way of doing things just isn’t possible in a virtual environment.

Then again, maybe it’s a phoenix rising from the ashes - a new way of coaching emerging?

[Read Root’s full story on taking 150 agents remote in 48 hours →](#)



PART ONE /

# The coaching landscape and Contact Center AI

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- Customer expectations at an all-time high
- Why is coaching so hard?
- Coaching in a remote world
- Closing the coaching productivity gap





PART ONE /

# Customer expectations at an all-time high

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Customer expectations were high at the beginning of 2020. With tons of competition one click or call away, delivering an ever-improving customer experience (CX) can make or break a business.

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

**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.<sup>1</sup>

**73%** of customers say that one extraordinary experience raises their expectations of other companies.<sup>2</sup>

**67%** of customers say their standard for good experiences are higher than they've ever been.<sup>3</sup>

## Why is coaching critical in contact centers?

- 😊 **Coaching = Continuous Improvement to CX**
- 😊 A powerful **performance management tool**
- 😊 Helps decide who needs to **move up or move out**
- 😊 Helps track the **development journey** of agents
- 😊 Helps keep up with **evolving business environment**

[1. Helpscout](#)  
[2. Salesforce](#)  
[3. Salesforce](#)



# Why is coaching so hard?

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## 1. Interactions are complex to analyze at scale

Beyond what is being said, you're tasked with understanding how it was said - needing to understand tone and volume. Additionally, you've got to turn that interaction into an accurate text transcript, as well as account for intent, accents, regional dialects, and more. Now do this at scale in the midst of a pandemic, with surging call volumes.

## 2. The way we do QA today is inefficient

Supervisors simply don't have the bandwidth to listen to a large enough sample of agent calls to objectively measure performance and effectively uncover issues in performance. Quality analysts play a role in helping managers and supervisors hone coaching programs, but because of manual processes, they spend more time listening to calls and scoring them than delivering valuable feedback to agents and coaching tips to supervisors.

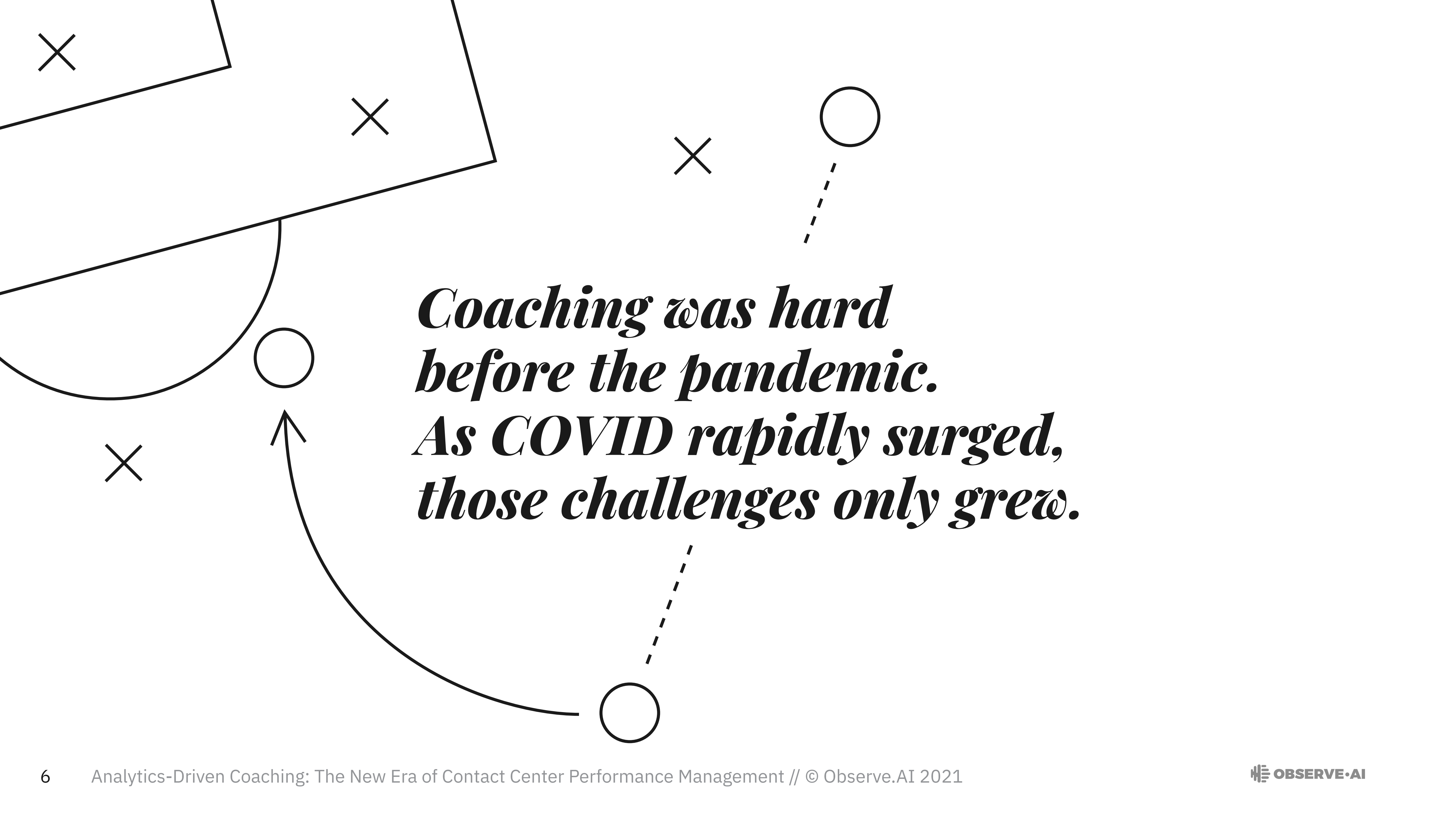
If consistently improving agent performance is the key to delivering a great CX, coaching programs are the catalyst. However, there are challenges every contact center will face as they handle a higher volume of customer interactions, and in turn scale their teams.

## 3. Coaching impact is poor because of lack of visibility

A substantial amount of time is spent by ops teams to aggregate performance data, then distribute it amongst managers and supervisors. In turn, supervisors are tasked with making sense of the data, and need to juggle multiple systems to do it. Now add in a 100% distributed contact center, and the real visibility challenges begin.

## 4. One-size-fits-all coaching programs

Coaching programs are often one-size-fits-all - addressing the broadest, most pressing needs. They aren't providing the impactful, custom-tailored coaching for every individual agent to drive a better CX. Coaching conversations are all over the place and agents are overwhelmed with too much information. There is a need for a more focused approach.



***Coaching was hard  
before the pandemic.  
As COVID rapidly surged,  
those challenges only grew.***



PART ONE /

# Coaching in a remote world

The pandemic has fundamentally changed the way organizations operate, collaborate, and coach. With that change, contact centers have had to find new ways to work productively, manage their new virtual environments, and lead their teams through these uncertain times.

For those responsible for coaching agents, learning and development, maintaining productivity in the face of new challenges is at the forefront of managing the transition.

## From in-person to Zoom

Contact centers are struggling to recreate the personal coaching environment to conduct impactful sessions in a virtual world. So much is lost in a virtual interaction - interpersonal queues, body language, tone - which leads to big gaps for something as relational as coaching and teaching.

## Agent enablement and inspiration

Supervisors periodically walk the contact center floor to monitor agents and provide in-person, on-the-spot performance coaching, as well as assisting agents with difficult situations.

[What does ad-hoc engagement look like remotely?](#) How does it scale?

## Camaraderie and culture

With agents handling hundreds of interactions daily, forming relationships amongst co-workers helps agents stay engaged and happy. Impromptu peer-to-peer learning sessions in a collaborative culture were the norm. How do you [provide your remote team unstructured time and formats for collaboration?](#) How do people understand how

they perform compared to peers and learn from top performers?

## Compliance mitigation

From the secure contact center floor (in terms of both technology infrastructure and physical environment), to the agent's living room, a new set of compliance challenges have arisen around maintaining compliance at home.



**Lack of feedback creates anxiety, worry and poor performance**

Source: [Slideshare](#)

PART ONE /

# Closing the coaching productivity gap

A greater focus on software integrations and a new reliance on interaction analytics and AI services, both in [maintaining business continuity](#) and easing the burden on teams, is helping companies better support their remote workforces.

## COACHING PRODUCTIVITY GAP



- Integrated AI services for analysis and agent evaluation
- Cloud-based
- API and integration focused
- Monolithic
- Manual interaction monitoring and analysis processes
- 100% on premise

### There were a number of success stories.



JK Moving, one of the nation's largest moving companies, used AI immediately to monitor for *PPE Moments*, where consultants used language to reassure customers that JK was adhering to COVID guidelines. These phrases helped drive additional revenue, attributed to coaching the team on new key phrases and key times.

VOO, a Belgian telco, moved 188 agents remotely in one week. Fully operational in the cloud, VOO saw a [38% increase in productivity within the week](#).



PART ONE /

# Closing the coaching productivity gap

On the other side, the ongoing stories of poor customer experiences spread far and wide. Bank customers waiting on hold for hours, and [sometimes days](#). The industry average on abandonment rate surged from [2% to 10%](#). The pandemic caused a perfect storm of customer service issues, with [companies struggling to keep up](#) while keeping their agents safe, engaged, and properly coached to handle the new normal.





PART TWO /

# Staying on the right side of the gap: Maintaining resilient coaching programs

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# 2

- How Contact Center AI and Automation Can Help
- Tenants of successful AI-enabled coaching programs
- Staying on the right side of the gap
- Enter performance analytics
  - Agent-driven and personalized
  - Agile and in-the-moment
  - Data-driven and increasingly real-time





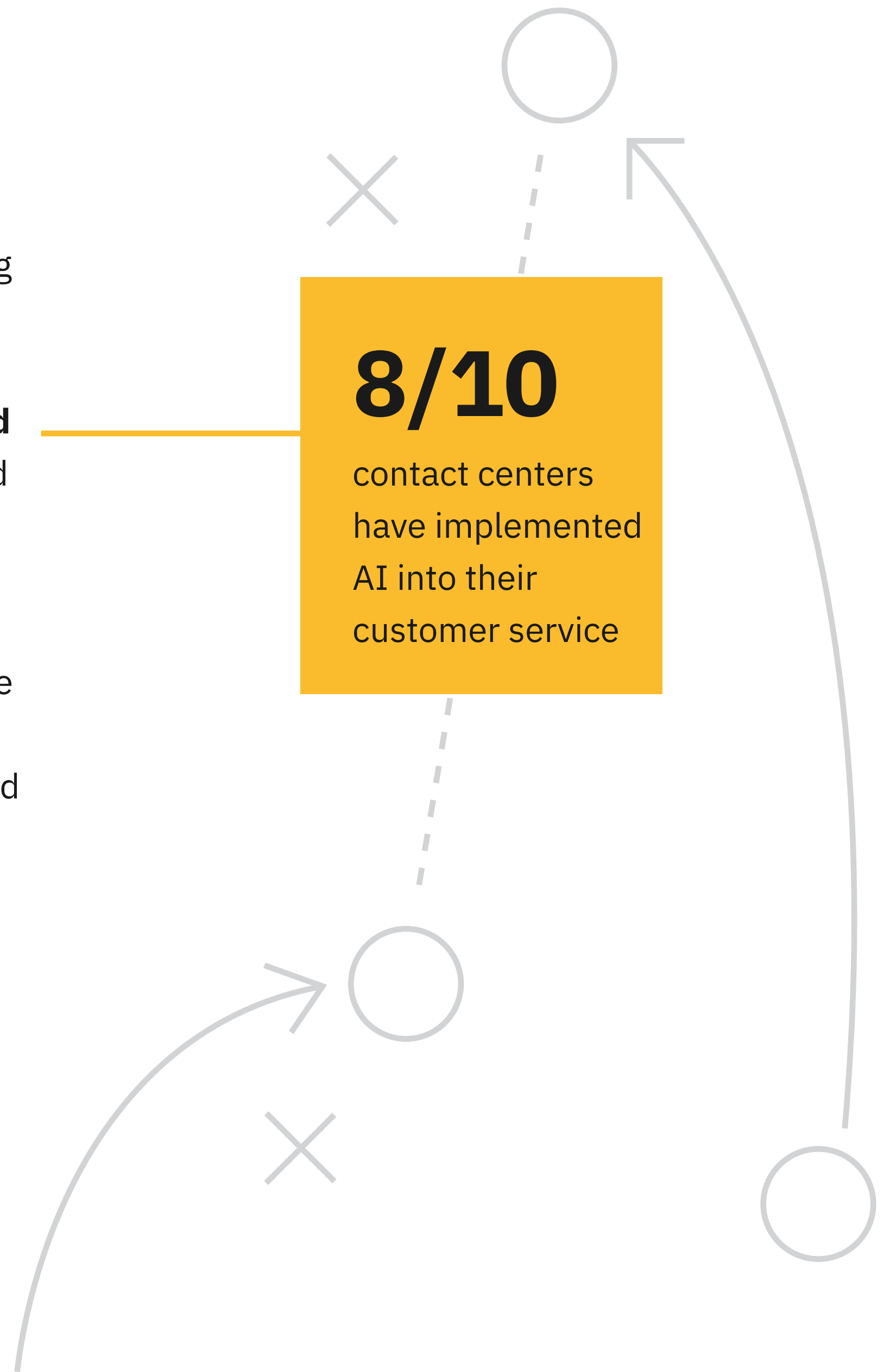
PART TWO /

# How Contact Center AI and Automation Can Help

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Over the last decade, contact centers invested heavily in AI technology to gain a deeper understanding into customer interactions taking place, streamline processes, and drive better results across their most critical KPIs. **In fact, 8 out of 10 contact centers have implemented AI into their customer service.** It's widespread and widely adopted.

But nobody could have foreseen the impact interaction analytics and AI services would have on the heels of the COVID-19 pandemic. The organizations that had invested in and embraced AI-driven technologies were far more equipped to handle the massive organization changes compared to those that hadn't.



PART TWO /

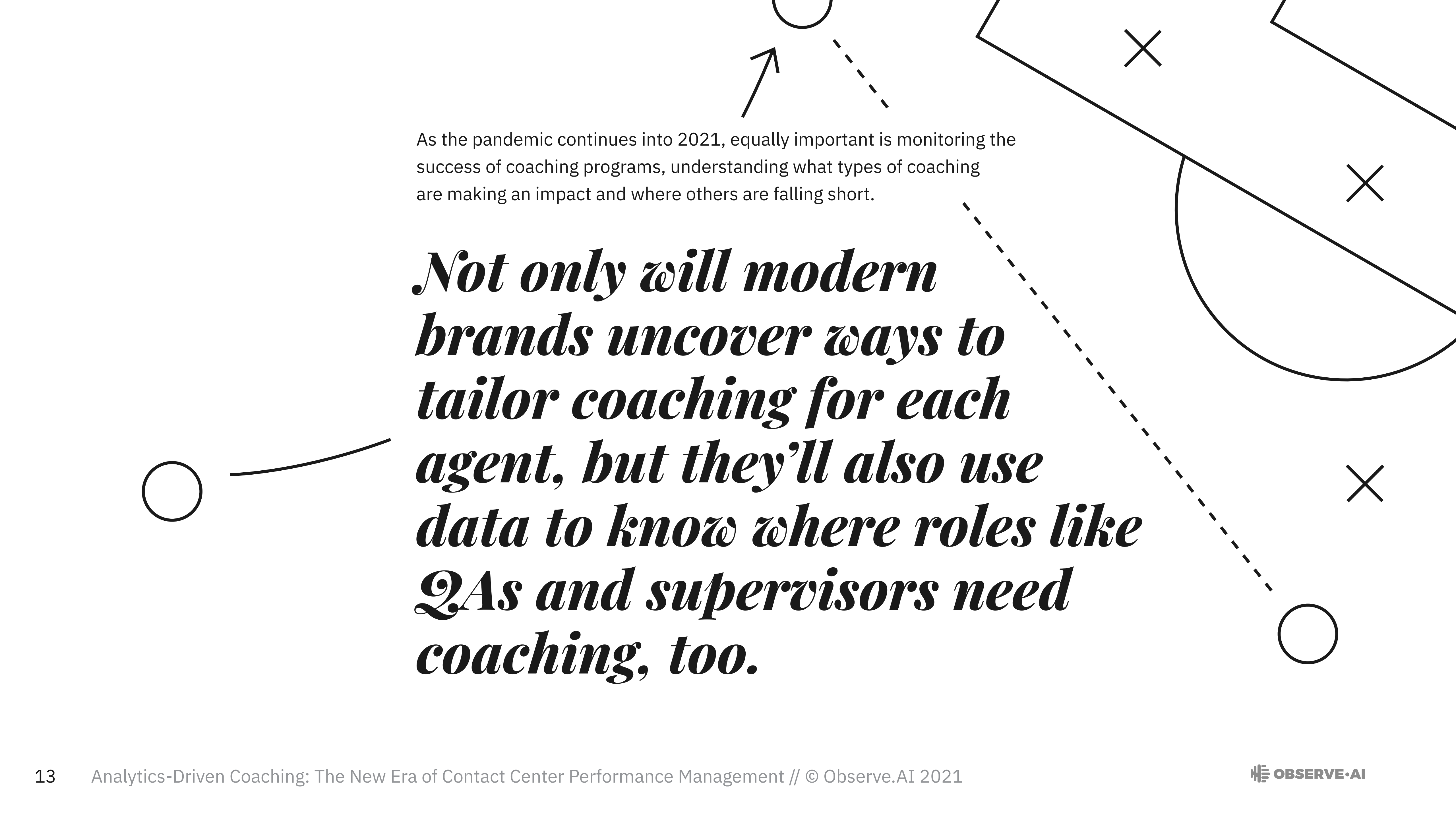
# Tenants of successful AI-enabled coaching programs

With a finger on the pulse of every business interaction taking place, AI-enabled contact centers were 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.

Business Driver	Coaching Use Case	Example Moments (Monitorable Interactions)
<b>CSAT effectiveness</b>	Improve agent-customer rapport by coaching agents on the most impactful empathy statements	<ul style="list-style-type: none"><li>– Agent empathy</li><li>– Customer sentiment</li></ul>
<b>QA efficiency</b>	QA analysts rely on automated QA evaluations to provide more targeted, frequent feedback to agents.	<ul style="list-style-type: none"><li>– Average handle time</li><li>– Dead air</li><li>– Hold time violations</li><li>– Supervisor escalation</li></ul>
<b>Compliance risk mitigation</b>	Identify instances and coach agents on common indicators of fraud attempts.	<ul style="list-style-type: none"><li>– Mandatory compliance dialogues</li><li>– Mini-mirandas</li><li>– Fraud attempts</li></ul>
<b>Agent performance</b>	Coach agents on how to de-escalate a frustrated customer with empathy-related talk tracks	<ul style="list-style-type: none"><li>– Talk track adoption</li><li>– Negative sentiment</li></ul>
<b>Growth opportunities</b>	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).



As the pandemic continues into 2021, equally important is monitoring the success of coaching programs, understanding what types of coaching are making an impact and where others are falling short.

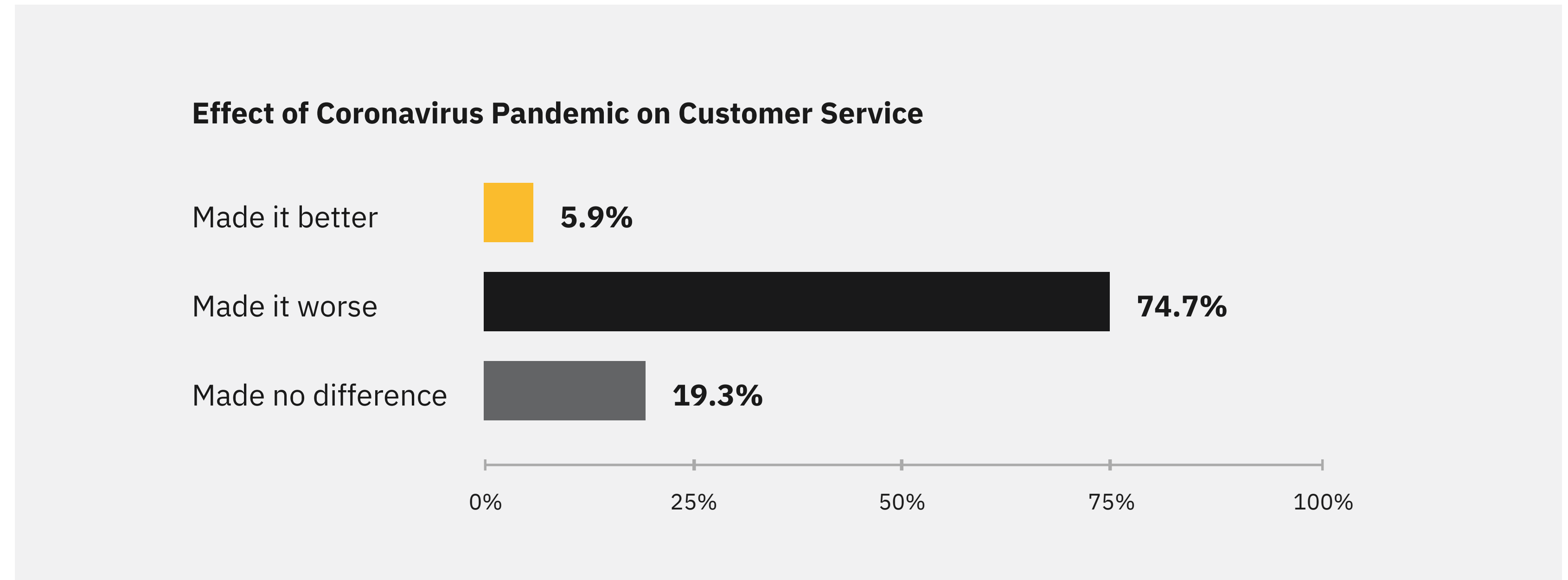
*Not only will modern brands uncover ways to tailor coaching for each agent, but they'll also use data to know where roles like QAs and supervisors need coaching, too.*



PART TWO /

# Staying on the right side of the gap

A recent NBC poll found that [75% of respondents](#) felt that customer service has worsened during the pandemic. Whether it's customer stress, the result of the rapid transition to work from home for entire contact centers, or agent preparedness for a new swath of customer queries, impactful agent coaching programs are the key to mitigating these challenges and falling into the other 25%.



**75%**

of respondents felt that customer service has worsened during the pandemic ([NBC/Telemundo Poll](#))

## PART TWO /

# Enter performance analytics

Agents have a direct impact on the customer experience, and contact center leaders need to continue to make coaching a priority to drive a return.

Thus, the emergence of new coaching workflows, powered by performance analytics. With deep intelligence on 100% of agent interactions, coaching programs have moved from one-size-fits-all to contextual and personalized.

Channel	Duration	Agent Name	Moments	Comments	Time of Interaction	Actions
Call	01:34 min	Wendy Warren	9 4 2	6	Sep 10, 2018 8:30 PM	View
Web Chat	45:33 min	Tanya Nguyen	2 8 7	1	Sep 10, 2018 3:02 AM	View
Web Chat	31:34 min	Victoria Murphy	5 2 4	1	Sep 10, 2018 1:06 AM	View
Call	4:22 min	Beth Henry	2 1 6	5	Sep 11, 2018 10:02 AM	View
Call	1:58 min	Jane Bell	4 7 5	1	Sep 11, 2018 5:55 AM	View
Call	23:23 min	Ralph Williamson	5 9 3	7	Sep 12, 2018 2:19 AM	View
Call	31:04 min	Leslie Jones	1 8 4	6	Sep 13, 2018 10:02 PM	View
Web Chat	21:34 min	Wade Lane	8 2 3	4	Sep 13, 2018 3:53 AM	View
Call	0:21 min	Jerome Pena	2 7 7	9	Sep 13, 2018 11:03 PM	View
Call	4:22 min	Ann Black	6 3 6	7	Sep 14, 2018 9:39 AM	View
Call	1:58 min	Wendy Fisher	3 4 8	6	Sep 15, 2018 12:05 AM	View

### What is performance analytics?

Performance analytics is the aggregation and analysis of various customer interaction types - voice calls, chat messages, social media, and email being the four most common. Common use cases include analyzing for customer sentiment, performance indicators (eg. average handle time, dead air, supervisor escalations), and ensuring compliance.

# Agent-driven and personalized

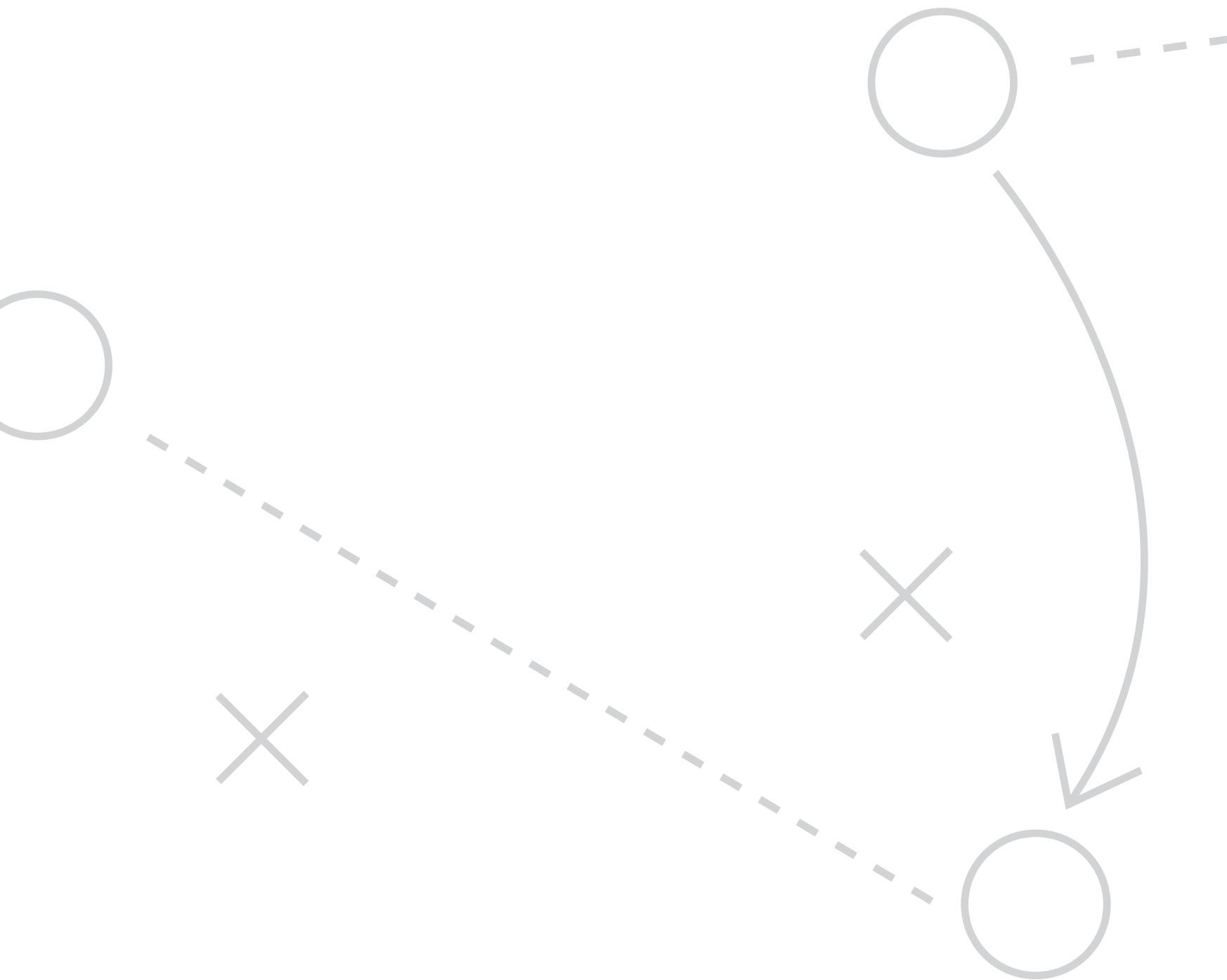
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A number of our customers proudly tout the cultural motto: “employee experience = customer experience.” The crux of that belief rests in not only empowering the agents themselves, but the quality analysts and supervisors as well.

Providing them the performance management tools and enabling real time feedback bridges that gap. This is how teams can quickly identify areas where agents are in need of improvement, and vice versa, where agents are shining. They can chart trends over time, and not just see how agents are improving, but also the impact of every coaching session.

## 5 Steps to Get Started with Agent-Driven Coaching

1. Identify what agents are excelling, and which ones are struggling. Look at average score across measurable metrics (eg. dead air, supervisor escalation, empathy).
2. Prioritize who needs help first. Look at total fails of evaluations.
3. Identify agents whose performance has dropped recently. Look at recent evaluation scores.
4. See who was missed in recent coaching cycles. Look at the last time they had a personalized coaching session.
5. Check if each agent is getting enough attention. Look at the total number of coaching sessions.

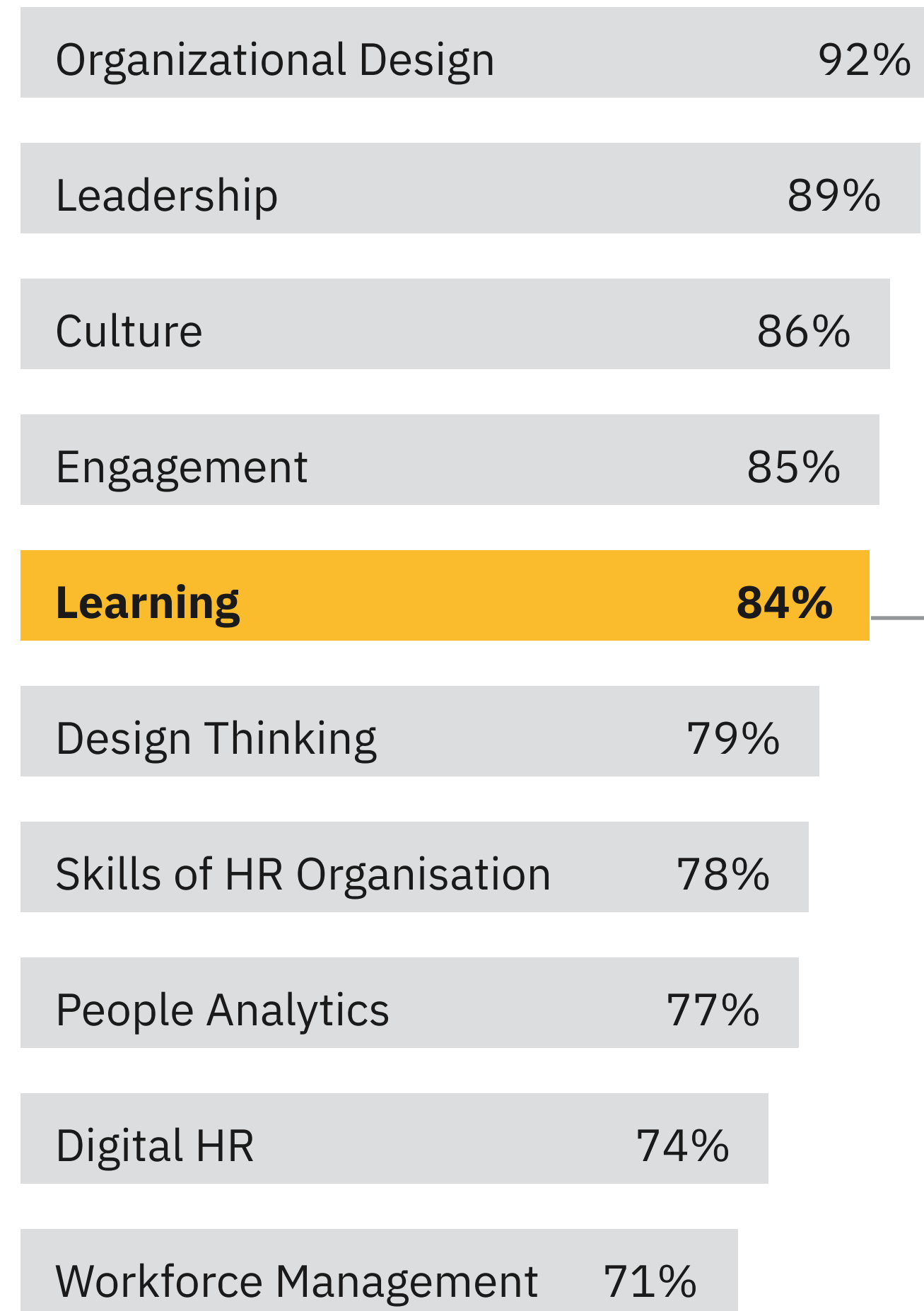




# Agile and in-the-moment

*The gap between the desire for better coaching, and the ability to provide it has grown to a [400% difference](#).*

Success rests in agility, being able to utilize direct and indirect data to drive action. That includes **proactively identifying and addressing issues before they become a widespread problem**. This could be [mandatory compliance dialogues](#) required for every interaction taking place. Or maybe a certain keyword or phrase that directly impacts [customer sentiment](#). It even includes leadership taking the insights from the frontlines to drive more impactful changes across the business. But the biggest impact is engaging the agents when they need help, **in the moment**.



Source: [Slideshare](#)

Earlier in this guide, we mentioned JK Moving's pandemic transition. Moving companies are obviously very hands on, and interact heavily in-person with their customers. From the get go, JK Moving had to ensure that their agents were properly communicating COVID-19 safety precautions to customers.

By quickly launching *PPE Moments*, to analyze the interactions related to this KPI, JK was able to rapidly and effectively coach their agents on the most impactful language to use to drive more customer trust, and as a result, higher conversions (in their case, booking a move with a customer).

**The gap between need and capability has increased 400% since 2014**

# Data-driven and increasingly real-time

Beyond the process, equally important is culture, with companies moving beyond the employee experience to create a learning and development culture built on transparency and trust. **Built on data, not assumptions and subjectivity**, agent performance is analyzed in a way that is fair for every agent.

Coaching sessions are built on the entire data set (the agent's entire conversation record), not a random interaction drawn from a hat. The result is more relevant, more fair, and more impactful coaching conversations. Less disputes, and more progress.

itelbpo, the largest BPO in the Caribbean, has made this practice the core of their [SMART Academy](#). Fusing together adaptive learning programs with interaction analytics, itel's L&D team is able 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. We have the ability, with specific examples, to train agents on the most important opportunities and celebrate achievements.”***

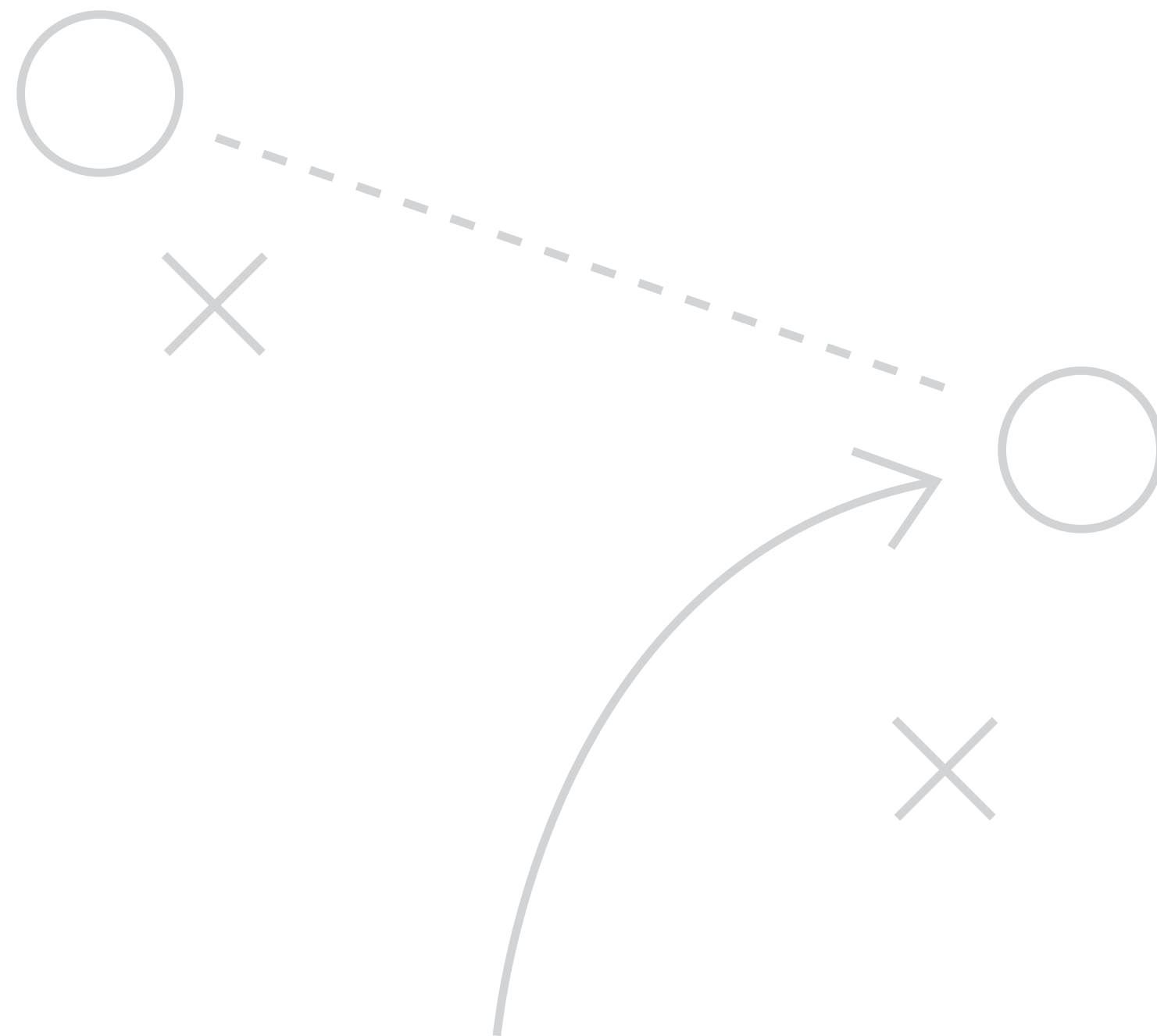
Shurland Buchanan  
Chief Learning Officer  
itelbpo



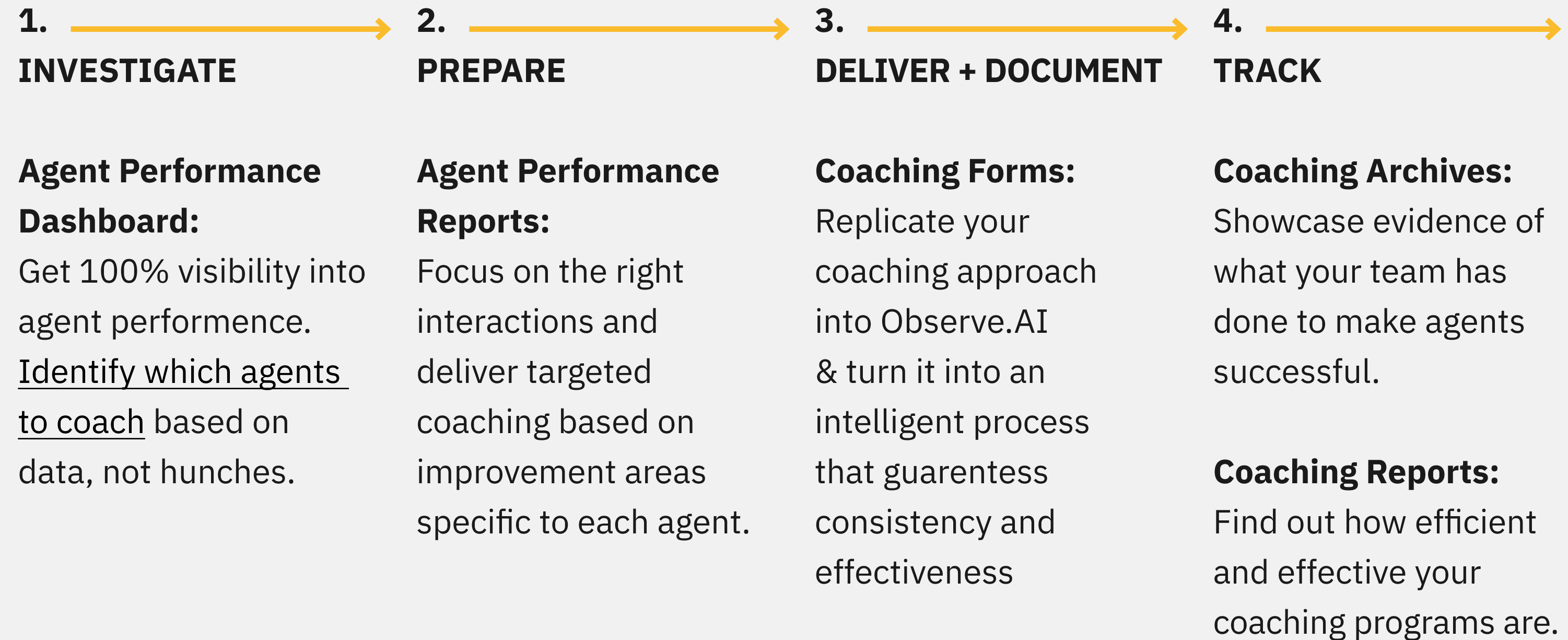
## What is Adaptive Learning?

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.

# Data-driven and increasingly real-time



## Transform people managers into CX coaches with power-packed features and deep workflows





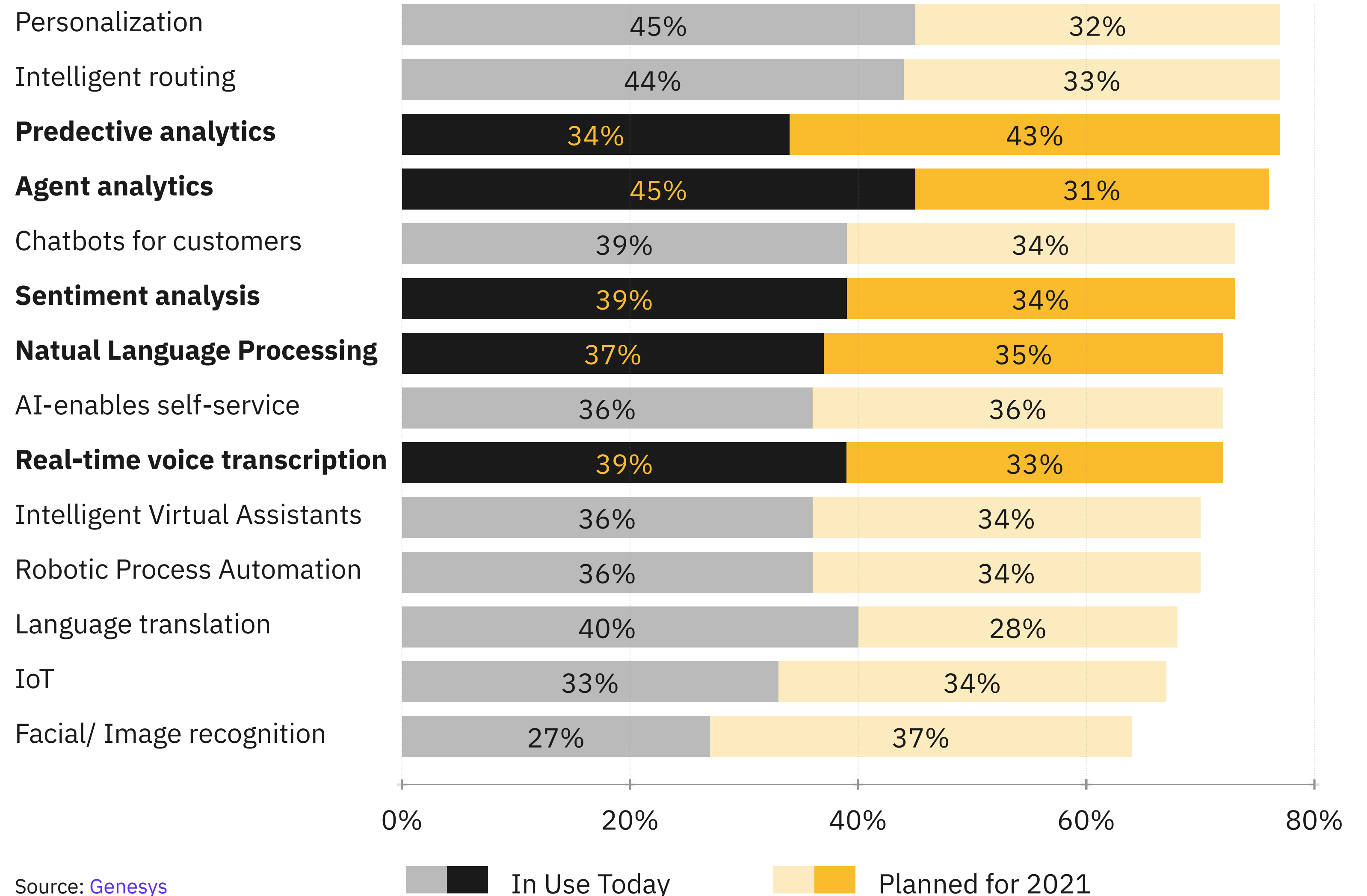
## WRAPPING UP /

# Looking forward

It's safe to say that the pandemic has radically transformed the contact center, from agents on the frontline all the way up to leadership. For those that were AI-enabled from the get-go, weathering the storm was seamless. For others, the crisis served as a trigger to reflect and drive change at their organizations, with the lofty goal of improving their coaching programs and providing agents certainty in a time of uncertainty.

But one thing is for sure - AI-driven services built around the interactions themselves is the key to driving more impactful coaching programs, and in turn, stronger enablement, productivity, and agent engagement. And that means outperforming and out-innovating the competition.

## Types of AI In Use / Planned for CX Initiatives








# About Observe.AI

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](http://www.observe.ai)

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