

How to use Observe.AI for Coaching Sessions

The purpose of this document is to understand how to create coaching sessions for agents and is intended for individuals with Admin and Supervisor roles.

Introduction to Coaching

What is Coaching?

Coaching is the process of improving agent performance through honest discussion and pinpointed feedback. Through Observe.AI, coaching can provide opportunities to improve your contact center and help individual agents become more effective.

Why do we coach?

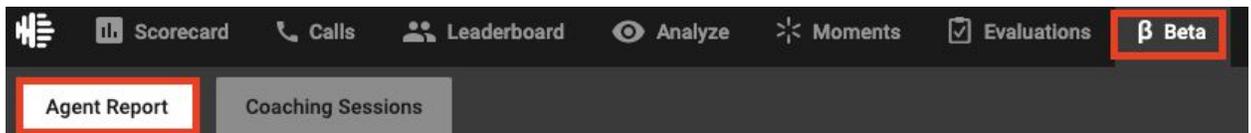
- **Coaching to CORRECT:** Focusing on the behavior (rather than the agent), these are coaching sessions built around explaining what could have been done better or differently. This is how agents build competence.
- **Coaching to CLARIFY:** Built around content and knowledge, these are coaching programs that educate agents on changes in process, compliance norms, new product lines, and new promotions. This helps agents find ways to navigate complex customer encounters and arm them with tools to build better rapport.
- **Coaching to CELEBRATE:** While 'correct' and 'clarify' focus on behaviors and improvement, 'celebrate' focuses on the success of the agent, praising the things that went well which boosts agent morale, and in turn, building confidence.

Step 1 - Go to the Agent Performance Dashboard

1. In order to create a coaching session, click on the 'Beta' tab*.
2. Then click 'Agent Report'

(for information on this page, please go to the article 'How to use the Observe.AI Agent Report Tab').

**Note: The Beta Tab in Observe.AI is used to indicate that the capability is close to General Availability, but there may be known issues, limitations, as well as further customer validation of the use case that is required.*



3. From the list of agents, click on the agent to be coached.
(for information on this tab, please go to the article 'How to use the Observe.AI Agent Performance Dashboard')

Evaluations Done	Avg. Score	Total Fails	Recent Evaluations	Last Coaching Date	Coaching Sessions	Action
231	65.48%	141		Sep 17, 2020	1	View

4. On the specific agent's page, click on the 'Create Coaching Session' button on the top right corner of the page.



Step 2 - Create Coaching Session

In order to create the most effective coaching session it is important that some preparation is done beforehand. A few good practices are below:

- Listening to calls that have been evaluated for the agent will help to provide a good understanding of areas to coach to. To do this, go to the 'Evaluations' tab and use the filters to review the evaluations for that specific agent. *For more information on the evaluations tab go to the document 'Observe.AI Dashboard <> How To QA Evaluate and Leverage the Evaluations Tab [Step 7]'*
- Review 'Areas of Opportunity' that are highlighted in the agent performance dashboard. 'Areas of Opportunity' show the number of times an agent has missed the same question on an evaluation which may highlight an issue that the agent needs to work on.

Using all of this data, a coaching session can be created. Sections are provided in the coaching session form to include as much information as possible to the agent:

Coaching Area: Areas that the agent will be coached to. Specific moments will start auto populating as text is input. These moments can be added as coaching areas, or custom areas can be manually input in the coaching area field.

**Note: Please note that you can only add up to five coaching areas per coaching session.*

Coaching Area:

Hold Time Violation × customer v

Customer Verification

No Customer Verification

[Add custom area "customer v"](#)

Calls marked for coaching: Evaluations from specific calls or calls marked for coaching can be added to the coaching session to be reviewed together with the agent.

<p>QA Evaluation Form</p> <p>Evaluation Date : Sep 18, 2020 10:01 AM AST ></p> <p>Evaluator : ryan.perryman</p> <p>Score : 95% ✔ Pass</p> <p style="text-align: right;">✔ Added to coaching Remove</p>
<p>QA Evaluation Form</p> <p>Evaluation Date : Sep 18, 2020 10:01 AM AST ></p> <p>Evaluator : ryan.perryman</p> <p>Score : 75% ✘ Fail</p> <p style="text-align: right;">Add to Coaching</p>

Feedback: A free form field to include any feedback to be provided to the agent

Feedback * ?

We need to decrease your hold time. If you start getting closer to the 2 minute hold time violation, jump back on the line and assure the customer that you are still working on their issue.

Action Plan: A free form field to include what actions the agent should take following the coaching session.

Action Plan *



Decrease hold time violations from 5% to less than 2% by next week.

Followup Date and submission: Specify a date to follow back on the feedback and action plan discussed. After the coaching session has been conducted, submitting the session saves it to the agent's coaching log.

Followup Date

Feb 09, 2021



Submit Session

Step 3 - Review Coaching Sessions

After a coaching session is created, a repository of all the coaching sessions conducted for that agent is kept in the coaching notes section of the agent performance dashboard. The same sections that were filled out initially can be seen at a glance on this page.

Coaching Date	Coach	Coaching Area	Action Plan	Follow-up Date	Action
Sep 25, 2020 5:47 PM AST	ryan.perryman	n/a	this time follow up in 2 weeks!	Oct 09, 2020	View
Sep 10, 2020 1:00 AM AST	ryan.perryman	Hold Time Violati...	work on keeping customer on hold	Sep 23, 2020	View
Sep 8, 2020 5:10 PM AST	ryan.perryman	Hold Time Violati...	Decrease hold time violations from 5% to le...	Sep 22, 2020	View
Sep 1, 2020 6:49 PM AST	ryan.perryman	n/a	check back in 2 weeks - be diligent about m...	Sep 15, 2020	View

To see a repository of coaching sessions for all agents go to Beta > Coaching Sessions.

OBSERVE-AI						
Agent Report Coaching Sessions						
13 of 13 Coaching Sessions						
Coaching Date	Coach	Agent	Coaching Area	Follow-up Date	Action	
Sep 30, 2020 11:52 PM AST	ryan.perryman	ryan.perryman	n/a	Oct 07, 2020	View	
Sep 28, 2020 11:39 PM AST	ryan.perryman	Montaser Ahmed	n/a	Oct 05, 2020	View	
Sep 25, 2020 5:47 PM AST	ryan.perryman	afonsoestima	n/a	Oct 09, 2020	View	
Sep 23, 2020 5:42 PM AST	ryan.perryman	Alexandria Ramirez	n/a	Oct 01, 2020	View	
Sep 17, 2020 11:25 PM AST	ryan.perryman	eduardo.gomes	n/a	Oct 01, 2020	View	
Sep 17, 2020 8:53 PM AST	ryan.perryman	diana.balona	n/a	Oct 01, 2020	View	
Sep 16, 2020 10:36 PM AST	ryan.perryman	Alexandria Ramirez	offer mentions aht	Sep 23, 2020	View	

Coaching Date: The date of this specific coaching session.

Coach: Who conducted the coaching

Agent: Who received the coaching

Coaching Area: The subject of this coaching session. This is a free-form data entry field that the coach can decide.

Follow-up Date: When will the coach reach out to the agent again.

View: Directs back to the coaching session with detailed information.

By evaluating agents and providing regular feedback through coaching, agents will have a better understanding of areas they can strengthen, or areas they need to change. This will help to empower agents with constructive feedback along with improving overall customer experience.