CALL COACHING TEMPLATE FOR HIGH-PERFORMING 1:1s

Take this template to your next coaching session and see immediate results.

Keep it simple and focused.

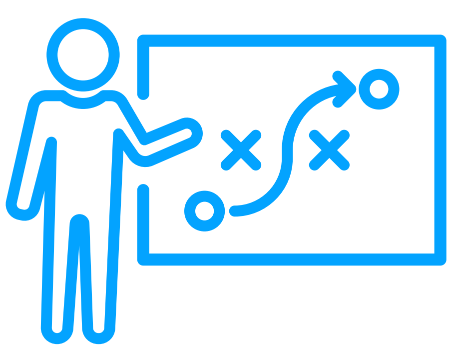
Before The Coaching Session

Agent

- [ ] Choose 3 to 6 calls that they want to review in the coaching session
- [ ] These calls will be sent to the manager the day BEFORE the session

Manager

- [ ] Keep a running doc of agenda items throughout the week and share it with your agent.
- [ ] Review the calls from the agent before the session BUT don't leave any call notes. The goal is for the agent to lead this part of the session.



Coaching Session Structure

Part 1 - Initial Focus: Agenda & Self-Discovery

DO'S	DON'TS
Give your agent a run-through of what you'd like to focus on for today's 1:1	Look up metrics while in the coaching session, that just wastes time.
Get to know your agent better on a personal level. Lead with personal questions: how their week is going, weekend plans, etc.	Dive right into "issues".

Things To Implement:

- Recap the last session and goals for the week including performance metrics. This sets the tone for the coaching session.

- Questions to Ask:
  - How did last week go?
  - What progress was made towards your goals?

ABSTRAKT

Part 2 - Deep Dive: Call Review

DO'S	DON'TS
Review the calls with the agent. Let them lead this portion.	Too much information means less implementation from the agent's perspective.
Feedback should be concise and actionable.	Playing the game of catch up. Review the calls beforehand so you know what to expect.
What did the agent feel like they did well? What did the agent feel like they could improve upon?	Only focus on their weakness or things they aren't doing well.

Things To Implement:

- Listen to a call multiple times, if needed, to thoroughly review.
- Ask questions - seek to understand before being understood.
- Whether you're coaching a top performing or entry-level agent, their feedback and participation are crucial.

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Part 3 - Action Items: Accountability & Homework

DO'S	DON'TS
Agree on action items/goals to achieve for the next week. Try to keep it focused on one main goal or area of improvement.	Set goals without the agent's input. Agents should have a say in what their goals should be, allowing you to gauge their confidence.
There should be accountability items for both the manager and the agent. A follow-up email is a great place to start.	Expect results from your agents when you don't hold yourself accountable.

Things To Implement:

- Questions to Ask:
    - What did you takeaway from this session? What was helpful?
    - Do you think your goals/focus area is achievable for this next week?
    - What (*if any*) metrics would you like to focus on moving forward other than the ones we looked at today?

- Give your takeaways as a manager

- Show what the best performing are doing (metric-wise) to show their progress towards matching those.

- Ensure "homework" is set for the agent as that will be reviewed next session.

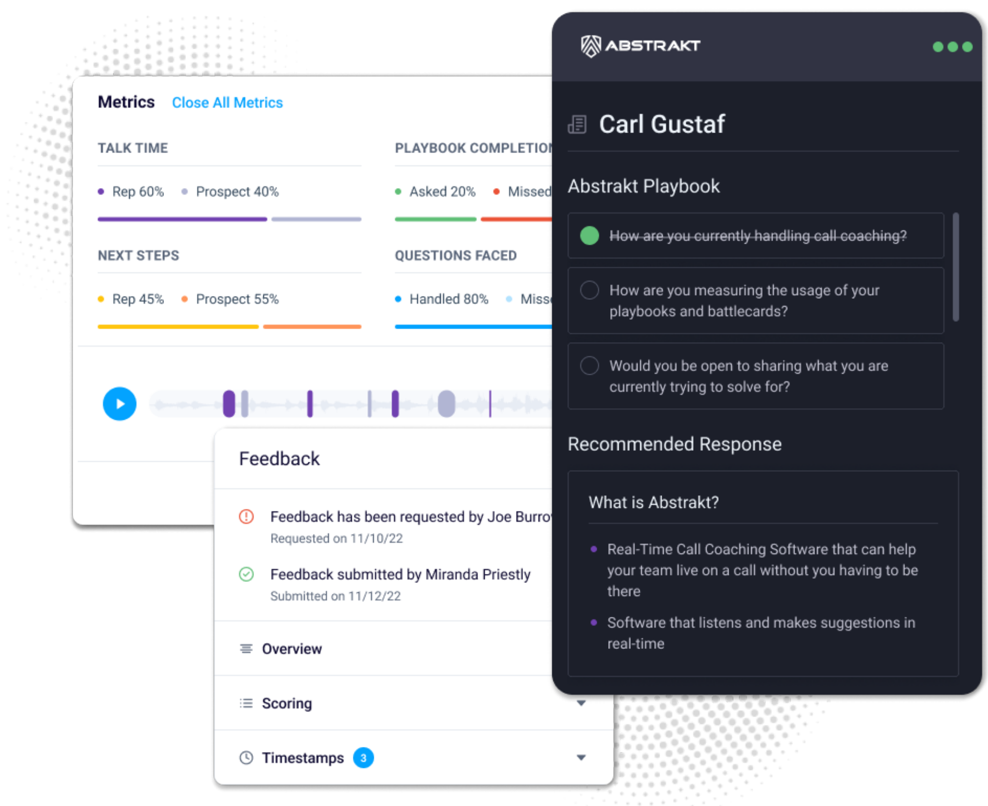
ABSTRAKT

With Abstrakt, our customers receive coachable moments daily. No more searching through transcripts or listening to call recordings.

Abstrakt gives managers the time to focus on coaching sessions and improving agent performance by reducing the manual workload.

Plus agents receive REAL-TIME coaching live on the call so they always know the right thing to say at the right moment.

It's that easy.



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