

Use this after an assessment, QA review, nesting observation, mock interaction, customer transcript, or coaching conversation. Choose one focus area at a time.

Agent name

Role / queue / channel

Coach

Date created

1. Identify the gap

Focus area - circle one or write your own

Clarity

Structure

Listening

Empathy

Questions

Writing

Next steps

Tone

Observed issue

Write the behaviour, not a vague label. Example: "Apologized but did not explain the next step."

Why it matters in the role

What does this create for the customer, QA, handle time, or supervisor effort?

2. Set the goal

Coaching goal

Make it observable. Example: "Summarize the issue before explaining the next step."

What good looks like

Describe the stronger response the agent is aiming for.

Success measure

What will you review next time? QA call, chat transcript, written update, mock scenario, etc.

3. Practice and feedback

Scenario or interaction used

Coach feedback

One or two specific behaviours only.

Agent improved attempt

4. Match the activity to the gap

Listening or issue confirmation

Use: Explain-It-Back Drill - summarize the customer issue in one or two clear sentences.

Process explanation

Use: One-Minute Process Explanation - explain with first, next, then.

Missing information

Use: Clarifying Question Practice - ask the first three questions needed before solving.

Repeat contacts or complaints

Use: Empathy That Reduces Effort - recognize the burden and take action that reduces effort.

Written communication

Use: Rewrite the Customer Update - add status, next step, and timeline where possible.

Next-step control

Use: Next-Step Practice - explain what happens now, what happens next, and when to expect an update.

5. 30-day coaching rhythm

Week	Focus	Notes / evidence to review
Week 1	Diagnose the main gap. Choose one focus area and one activity.	
Week 2	Practice the selected activity. Give feedback on one or two behaviours.	
Week 3	Apply the skill to a real or realistic interaction. Review evidence.	
Week 4	Decide next step: continue, change focus, assign practice, or add support.	

Key reminder

Coaching works best when the goal is specific, the practice matches the gap, and the follow-up checks whether the skill shows up in real work.