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A RMG Training Company White Paper

Reality-Based Coaching:
Practical Leadership Skills to Improve Customer Service Performance

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In order to achieve a vibrant and lasting service quality culture, effective service leaders address and correct employee performance on an ongoing basis. Reality-based *COACHING TO IMPROVE* skills are used to help employees consistently achieve job success. Coaching to improve skills may be used to guide a new employee toward achieving job expectations. It may also be used to guide an experienced employee back to expected performance when an element of his/her performance has slipped. *COACHING TO IMPROVE* can prevent an employee's performance from deteriorating to the point that more serious disciplinary action is needed.

Why employees need and benefit from coaching?

Some managers ask, “*Why, if we hire and train the right people, do I have to spend the time and energy to coach them?*” A basic assumption behind this question is *the right person will always be a consistent performer*. Experience tells us that *EVEN HIGH PERFORMERS EXPERIENCE OCCASIONAL DOWNS IN THEIR LEVEL OF PERFORMANCE*. No matter how talented, skilled or knowledgeable, *MOST PEOPLE ARE NOT ALWAYS CONSISTENT PERFORMERS*. Performance can be affected by events ranging from the purchase of a new house to the death of a family member. It can also be affected by one's health, other employees, new policies, procedures or other job changes. Stressful events that occur at work can easily discourage people to lose their confidence. This often contributes to slippages in performance consistency. Even the *RIGHT PERSON*, therefore, will have periods in which elements of his/her overall performance will fall below desired expectations. If the leader is not aware of these periods, and more importantly does not get involved, more serious performance problems are likely to occur. Sometimes, leaders are aware that a problem exists but are afraid of confronting the employee because they hope things will improve on their own. The reality is that if an employee's performance problem is not addressed by the leader, the performance problem is likely to continue or even deteriorate.

Keep in mind that the skill of coaching to improve is used when an *ELEMENT* or two of a person's performance is below standard. Remember, the coach is not saying that the person's entire job performance is a problem, just a piece of the total.

Everyone who works, including you, need and expect performance feedback – whether it is reinforcement for successes or coaching to improve performance. Employee surveys, repeatedly report that the most common complaint by employees is the lack of feedback from their bosses. Surveys report that employees say it is infrequent that they get feedback from their leaders about how they are doing.

Employees *NEED* and *WANT* performance feedback, both reinforcement and coaching. When performance feedback is delayed, the communication between the manager and the employee often becomes defensive and strained. If *COACHING TO IMPROVE* is practiced regularly with employees when it is needed, the feedback is not threatening. This productive setting is possible because the most important step in effective coaching is giving the employee an opportunity to find positive solutions to their performance problem. Leaders benefit by providing coaching feedback because a crisis can be avoided and the performance of an employee usually improves.

In summary, leaders should be proficient in performing the skill of *COACHING TO IMPROVE* because:

- Employees don't always perform consistently.
- Their feedback is needed to improve the employee's performance.
- Employees need and want feedback.
- Crisis situations can be avoided.

When Is It Appropriate To Coach Employees? The skill of *COACHING TO IMPROVE* is used when an employee asks for help to improve performance or the leader becomes aware that the employee is not performing part of the job at the level expected. In both cases, it is important that the leader respond *POSITIVELY* and *IMMEDIATELY*. If a leader does not respond, the employee is led to believe that the performance he/she is using is acceptable. Without the benefit of constructive feedback the unsatisfactory performance will continue and in most cases deteriorate until a crisis occurs.

Let's now review some useful tips to guide leaders regarding *WHEN* to use skill of coaching to improve performance:

- *COACHING TO IMPROVE* should occur as a result of an employee not performing particular skills that are expected.
- *COACHING TO IMPROVE* should be specific and job related.
- *COACHING TO IMPROVE* should occur soon after the unsatisfactory performance occurs.
- *COACHING TO IMPROVE* has the greatest impact on employees when they actively participate in the communication.
- Coaching should be one-on-one and occur in private.
- Improved performance must then be reinforced in order for the successful performance to continue.

COACHING TO IMPROVE is used with new employees to accelerate their learning curve and reduce unneeded errors. When used with experienced employees, it reduces unproductive periods and helps reestablish needed confidence, job satisfaction, and productivity.

The communication steps leaders follow in *COACHING TO IMPROVE* successfully are:

1. Greet Employee and Define Purpose of Discussion
2. Identify Specific Problem
3. Ask for Specific Results of the Behavior
4. Ask for a Comparison of Results to Expected Performance
5. Ask/Agree on Ways to Improve
6. Encourage Accomplishment
7. Schedule Follow-Up

Let's now review each of these proven communication steps in more detail:

1. Greet Employee and Define Purpose

When you coach an employee's performance, your initial words should extend a *GREETING*, using the person's name, and should *DEFINE THE PURPOSE* of the conversation. Here is an example of an effective greeting that clearly defines the purpose:

- *"Judy, I want to give you some feedback about the level of service you provided your last customer."*

2. Identify Unsatisfactory Behavior

For coaching to be effective, the employee must first clearly understand *WHAT* about part of his/her performance is not satisfactory. This need requires the coach to be very *SPECIFIC* in describing the employee's unsatisfactory performance. If the coach describes the behavior in general terms, the employee will not know the specific behavior to change. In addition, some employees become irritated because they know that not everything about their performance was unsatisfactory. The following illustrates how to be specific when coaching an employee.

- Do say: *"Judy, when the customer, Mr. Allred, complained about the level of service he received over the phone yesterday, you avoided his concern and tried to move on to another subject."*
- Don't say: *"Judy, you sure need to improve your service quality skills of handling irate customers."*

For coaching to be effective *THE EMPLOYEE NEEDS TO ACTIVELY PARTICIPATE IN THE DISCUSSION*. Failure to involve the employee quickly in the discussion establishes an adversary relationship between the coach and the employee. From the employee's point of view, the situation becomes a disciplinary action versus a helping action. An important element of employee participation is the reality that the employee needs to develop *"OWNERSHIP"* for the needed change. With ownership, the employee becomes more interested and enthusiastic about performing the job successfully.

You'll discover how the remaining *COACHING TO IMPROVE* steps and skills are designed to positively improve employee performance by garnering employee involvement.

Regardless of whether the coaching session was initiated by the employee or the leader, steps 3, 4 & 5 are the most important in gaining employee participation. By asking questions, the coach gives the employee an opportunity to analyze the situation to determine how best to improve performance.

3. Ask for Specific Result of the Behavior – The Impact

This step helps the employee understand the negative impact of his/her performance. The coach asks questions like these:

- *"How did Mr. Allred respond when you did not respond to his complaint about poor telephone service?"*

- *“How did the other customer’s react when Mr. Allred raised his voice and said, ‘Wait a minute ... Aren’t you going to do anything about the way I was treated yesterday?’”*
- *“What impact did not responding to his complaint initially have on you, Judy?”*
- *“What are customers likely to do if we do not help them when they bring a concern about our service to us?”*

Effective questions asked by the coach give the employee the opportunity to analyze and identify the potentially unsatisfactory results. The employee’s awareness of the problem is heightened without being treated disrespectfully.

4. Ask for a Comparison of Results to Expected Performance

One of the most difficult activities for any leader is to *TELL* an employee that a segment of his/her performance is not acceptable. Managers sometimes are reluctant to confront the employee for fear of upsetting him/her. While employees need and expect feedback, they prefer not to be talked to in a judgmental way. By using participative skills to compare the employee’s performance to the expected performance, the problem is confronted by the employee who evaluates his/her own performance.

For example, the coach may ask the employee: *“How does your performance compare to the techniques you learned in your SERVICE PLUS training?”*

In most cases, when employees are given the opportunity to evaluate their own performance, they will accurately identify the gaps in performance as compared to established performance standards. If not, the coach still has the option of confronting the employee with the problem.

5. Ask/Agree on Ways to Improve – Develop Strategies

THIS IS THE MOST IMPORTANT STEP IN GAINING EMPLOYEE INVOLVEMENT. In order for behavior to change, it is critical that the employee identify the specific *WAYS* to perform differently. Naturally, it is also appropriate for the coach to share some of his/her own ideas and work with the employee to develop successful service quality improvement strategies.

A valuable coaching skill when developing strategies or ways to improve is to *ASK*, not just *TELL*. Remember, people implement their ideas more successfully than other’s ideas.

The coach encourages the employee to use his/her experience and creative thinking to solve the problem. Some examples of open-ended questions to ask include:

- *“What skills did you learn in your SERVICE PLUS training to respond effectively to an irate customer?”*
- *“Why is it important to paraphrase the customer’s concern?”*
- *“What questions could you have asked Mr. Allred to help him vent his concern?”*
- *“What other techniques could you have used with Mr. Allred to restore his confidence?”*

Each of these questions encourages the employee to think about possible solutions. The coach need only concur with the acceptable solutions. By being the source of ideas, the employee is more likely to accept *OWNERSHIP* and *RESPONSIBILITY* for implementing them.

The questions by the coach led to the employee developing these performance improvement strategies in responding to dissatisfied customers:

- State regret and express empathy.
- Confirm that you will help the customer.
- Ask questions to clarify the facts.
- Educate the customer or correct the error.
- Restore confidence by reviewing what will be done.
- Complete a follow up with the customer to ensure resolution.

This type of coaching session usually ends on a positive note because the employee has discovered the solutions with the assistance and support of his/her coach. Both have worked together for the employee's benefit to achieve successful performance when dealing with dissatisfied customers.

6. Encourage Accomplishment

Any type of change required effort. So, the coach now encourages the changes by encouraging accomplishment.

The coach says, *“Judy, you have established solid ways to resolve customer complaints. From now on, whenever you deal with a dissatisfied customer, I encourage you to use all the service recovery skills. State regret and express empathy, confirm that you will help the customer, ask questions to clarify the facts, educate the customer or correct the error. Then you'll restore confidence by reviewing what will be done and complete a follow up with the customer to ensure resolution. I am confident you will be successful, Judy.”*

7. Schedule Follow-Up

The final step of establishing follow up establishes a strong sense of accountability with the employee. A scheduled follow up with you sends a clear message that your coaching discussion with the person is important and you expect success from the employee.

Here is an example of scheduling a follow up to the coaching session: *“I would like you document how you respond to your next three dissatisfied customers. After the service with the customer, complete a ServiceGram. Then, contact me so we can review the service event. Judy, this will provide us the opportunity to further fine tune your service recovery skills.”*

Effective communication and employee participation are the keys to help employees improve their service quality performance. Use the reality-based coaching skills and guidelines introduced in this paper to help employee's help themselves achieve solid customer service performance results.