



# The Challenges of Managing Advisors in a WFH or Hybrid Environment

Managing advisors working at home, and simultaneously managing advisors back in the office

Looking after advisors' wellbeing & mental health during both expected and unexpected changes.

Getting performance & productivity consistency with a mix of working environments

Proactively identifying issues that challenge WFH advisors & locating good examples to work with them on.

Understanding root cause for quality management issues

Assigning & tracking individual & team suggestions for improvement

Enabling advisor self-coaching and creating a culture of quality at all levels

# Coaching Styles



Are high performers, and increase employee engagement **by up to 40%** and improve the performance of employees **by up to 26%**



Found to degrade employee performance **by up to 8%.**

## Teacher Managers

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Coach employees on the basis of their own knowledge and experience

## Always-on Managers

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Provide continual coaching – they appear to be the most dedicated to their job

## Connector Managers

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Give targeted feedback spending more time assessing skills, needs, and interests

## Cheerleader Managers

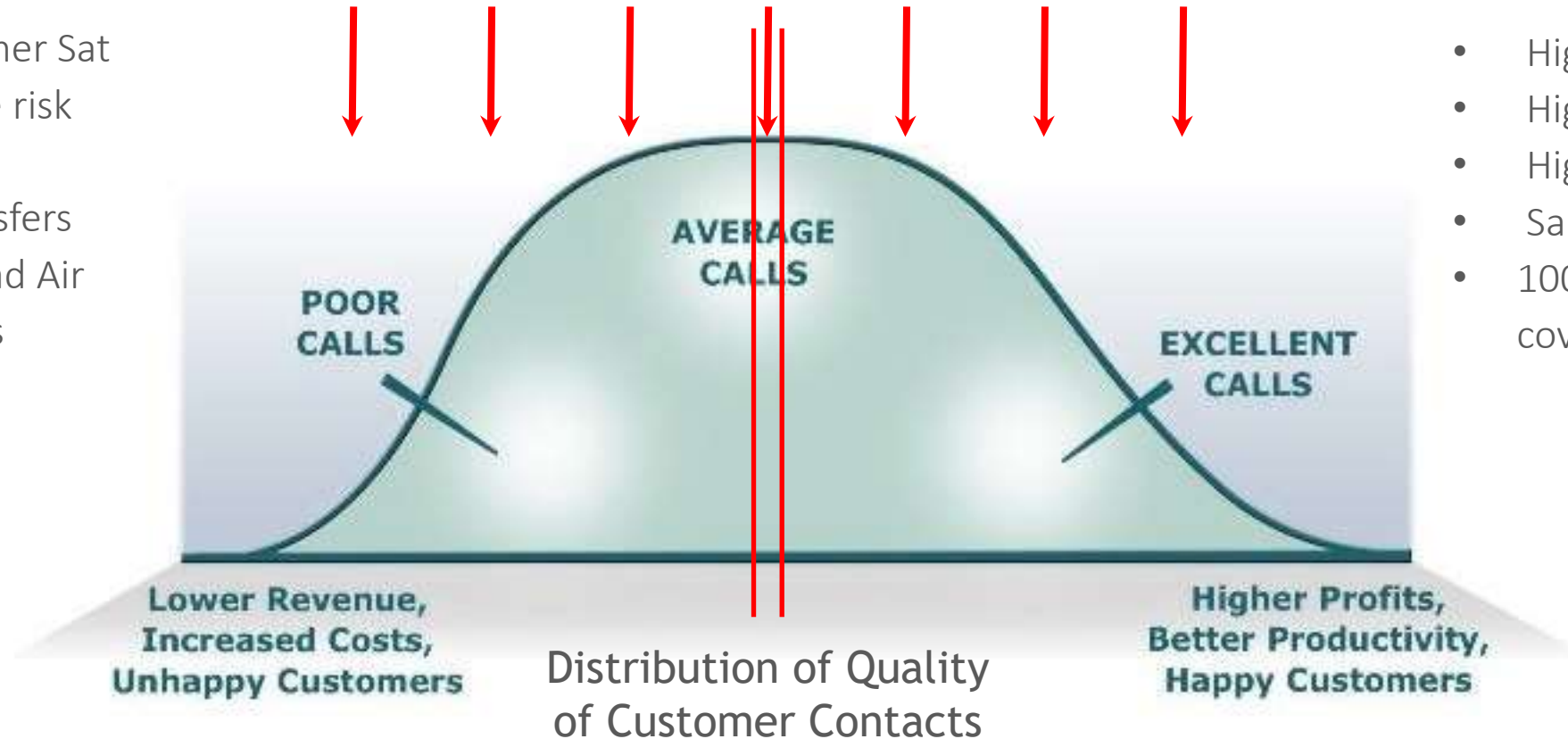
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Take a hands-off approach, delivering positive feedback

# Behaviours that matter

Random Call Monitoring and Surveys of small % of contacts can miss a lot and doesn't give team leaders time to focus on dedicated and targeted coaching where they can make the most difference

- Low Customer Sat
- Compliance risk
- High AHT
- Holds, Transfers
- Silence/Dead Air
- Repeat calls
- Anger



- High Customer Sat
- High quality
- High efficiency
- Sale achieved
- 100% compliance coverage



# Advisor performance management solution for building a culture of positive customer & employee experience, improved compliance and reduced risk.

Objective detail from every interaction empowers managers and advisors to focus on the importance of coaching and self-improvement to drive change.

# Enable your Advisor Community

Role-based Dashboards for Supervisors & Advisors

to present interaction insight for what matters to the user

Scored Focus Capturing Voice of the Customer AND Advisor

for efficient and objective awareness from every interaction

Case Management-like Assignment

to encourage accountability and action

Bi-directional Advisor Supervisor Communication

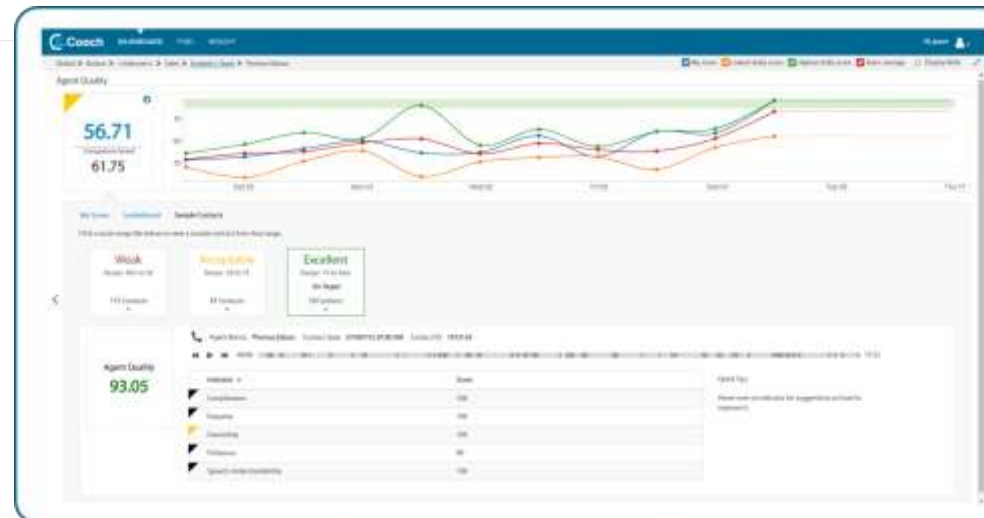
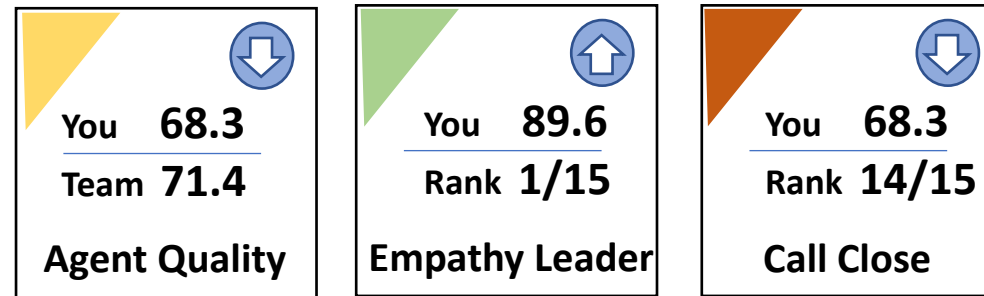
creates a culture of collaboration and performance optimisation

Uniquely Trusted Coaching Effectiveness

issue evidence for more effective coaching results



## Customise agent performance feedback to KPI's and motivators most relevant to them



### Intrinsic Motivators

- Autonomy
- Belonging
- Curiosity
- Learning
- Mastery
- Meaning
- .....

### Extrinsic Motivators

- Badges
- Competition
- Fear of failure
- Gold stars
- Money
- Points rewards
- .....

# Advisor Empowerment

## Coach encourages advisor empowerment via:

- Automated objective scoring based on 100% of calls
- Coaching that includes audio and transcription evidence
- Ability to engage the supervisor in bi-directional discussion for each coachable moment so that they feel empowered to review their own performance
- Personalised visibility of performance in context with the team
- Automated tips generated for self-improvement on specific behaviours (empathy, ownership, etc.)

## Why advisor empowerment is critical

*Empowered, engaged and satisfied call-centre employees are. . .*

- **8.5x** more likely to stay than leave within a year
- **4x** more likely to stay than dissatisfied colleagues
- **16x** more likely to refer friends to their company
- **3.3x** more likely to feel extremely empowered to resolve customer issues