

## **5-Step Coaching Process for Customer Service Issues**

1. **Position the discussion** – This step lets the employee know *why* the coaching is occurring. Too often leaders will begin discussing the performance situation (Step 2) without providing context. The best way to position the discussion is to refer to the organization’s objectives, values, or standards that connect to the performance issue you are addressing.
2. **Discuss the performance situation** – Based on the perspective of Step 1, what is the current performance? What is happening (or not happening) that is causing a problem? It’s important at this step to discuss observable performance and not pass subjective judgments such as, “You have a poor attitude.” The best approach is to discuss outcomes that have been agreed upon, but not satisfactorily accomplished or an organizational performance standard that has not been met.
3. **Set a plan of action** – At this step, the employee and the coach agree on what behavior(s) must change. A rule of thumb is that the employee should do the majority of the talking, with the manager guiding the discussion. The employee must own the solution. Keep in mind that the employee will not always agree that there is a performance problem. While it is most helpful that they *do* agree there is a problem, it is more important that they understand you expect a change in performance and that they are clear on what that change is.
4. **Communicate the consequences of non-performance** – This step is often left out because discussing consequences can be uncomfortable for the employee and the manager. Without consequences, however, there is little incentive for the employee to change his behavior. The consequences aren’t always extreme, like termination of employment – not every situation is that bad. But consequences must be discussed. The consequence may be to the organization or to the customer experience, but there is always a consequence. The employee should clearly understand the consequences of their actions.
5. **Set a follow-up plan** – Pull out the calendar and schedule a follow-up discussion. This step communicates to the employee that the coaching was not just a chat – changes are expected and he will be held accountable for those changes.