

WHITE PAPER

**How to Tell Anyone Anything:
Coaching your Service Team to Success**

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If you lead a service team, you are probably driven by a sense of purpose. You want to help create great customer experiences, mentor a talented team of people, and hopefully please your own management. But on the way to these goals, how often do you run into situations like these?

- You monitor George's phone calls, and hear him say with exasperation to a customer, "This is the third time I've told you what you have to do! Why aren't you listening to me?"
- Cindy is a service superstar. She has a natural way with people. She is also at the top of her game in terms of technical skills. But she comes in late at least twice a week, and people are noticing.
- Jose has adequate grasp of his job, but he generally acts disengaged and disinterested with customers, and tends to get low customer satisfaction ratings.

In this Parature white paper, we will look at fresh new approach to coaching service professionals that is based on recent developments in the psychology of how we communicate with each other - a painless, blame-free approach that has a track record of creating real performance and behavior change. As Richard Gallagher, noted communications skills expert and author of the book *How to Tell Anyone Anything: Breakthrough Techniques for Handling Difficult Conversations at Work* (Amacom, 2009) notes, "I am a former help desk manager myself, and implementing a strength-based approach to coaching was the key to creating near-perfect customer satisfaction ratings on my own team — and more important, near-zero turnover."

THE PROBLEM WITH COACHING

In an ideal world, you would tell people how to do their jobs well, they would gratefully receive your feedback, and everyone would live happily ever after. Unfortunately, you live in the real world - a place where agents often resist, resent, or even push back against what you say. Or worse, you get "yessed" and nothing changes.

There is a reason for this. And believe it or not, it may have as much to do with you as it does with them. The reason that much of our coaching is ineffective is that that vast majority of us use "deficit-based coaching," where we point out what is wrong with people and ask them to correct it.

In recent years, we have started learning that deficit-based feedback, however politely it is delivered, is often very ineffective. Why? Because we all have an instinctive survival reflex to defend ourselves against criticism, no matter how right the other person is. So instead of learning, we channel our energies into protecting ourselves. You don't need a psychologist to explain the reasons for this — all you need to do is think back to the last time someone criticized you, and see how you reacted.

Does "tough love" ever work in coaching situations? Sure. Sometimes people can be motivated by fear or shame to do things you want them to. And in situations where important boundaries are being crossed, such as threats, harassment, or criminal behavior, negative responses may be very appropriate and justified - after all, the biological purpose for anger is to protect ourselves and those we care about from danger.

But for most situations — including the vast majority you will encounter managing a service team — deficit-based feedback is a one-way ticket to sullen compliance and resentment, not superstar performance. That is why in recent years, we are hearing more about strength-based approaches to coaching that focus on the strengths and interests of the other person. By using an approach that shares a great deal in common with fields like psychotherapy, hostage negotiation, and athletic coaching, you can leverage the energy of your own team to create real performance change - even in very challenging situations.

THE MECHANICS OF STRENGTH-BASED COACHING

According to Gallagher, having a strength-based coaching dialogue is a “thoughtfully composed performance” that is best prepared ahead of time. He sees these discussions as a process that is very similar to what happens in a psychotherapy session - and one that you can break down into steps that anyone can learn with time and practice.

These steps combine together to create a coaching environment that is painless for both the coach and the agent - and most important, motivates real performance change. Let’s look at some of the key ones in detail:

1. Start the discussion in a safe place

The most important moment in coaching doesn’t even involve the other person — it involves you, and that knot in the pit of your stomach before you go in to talk with him or her.

Preparing the right words ahead of time can tame that knot. More important, it can get the other person talking. Human beings have an instinctive friend-versus-foe reflex that gets triggered within the first few seconds of a conversation, and when you start these conversations in a safe place, you accomplish two important things: you engage people without making them defensive, and you lower your own anxiety level. This, in turn, sets the stage for a productive dialogue.

So your first job — which is ideally done with a pencil and paper before you ever go in to the discussion — is to unpack the dialogue into its safe and unsafe parts, and create a neutral opening that is (a) on topic but (b) never puts the other person on the defensive. Sound impossible? Not when you break down the issue at hand into its component parts.

Suppose that Felicia has a history of talking back to difficult customers, and you need to talk to her about it. Let’s look at what is safe and unsafe about this discussion:

Less safe places to start: Felicia’s temper, her performance, company standards

Safe places to start: How customers act, and how Felicia feels when customers frustrate her

Let’s be honest: every fiber of your being wants to talk about the first group of things. These are the issues that are bothering you. This is why you are having the discussion in the first place. *And the discussion will get there eventually.* But if you start there, you know that you are likely to run into a brick wall of excuses, defensiveness, and discomfort.

This is what makes the second group of things so powerful for you. They are not only safe things that speak to Felicia's interests, but they are also likely to get the two of you into productive dialogue on exactly the topic you want: how she responds to difficult customers. In general, here are some ideas for safe places to start a coaching dialogue:

- Asking someone how they perform a task: "Could you walk me through how you set up a help desk ticket?"
- Exploring how they feel about a situation: "Do you feel stuck when people demand an escalation and no one is available?"
- Making a neutral observation: "I can tell that certain kinds of customers frustrate you."
- Sharing your own experience: "I used to struggle with the same issue myself."

Even with really difficult or sensitive performance issues, there are always safe places to start: for example, simply asking if someone is having trouble getting to work can open a dialogue with someone who is chronically late, while observing that co-workers annoy someone can start a productive discussion about workplace conflict. So find the safest place you can to start, and let it lead both of you toward the place you want to go.

How's the weather?

One type of neutral opening that is rarely, if ever, effective is to start on another topic. When you ask people about the weather, discuss their wife and kids, or even gratuitously praise their performance, you risk two things. First, you are not getting the other person in dialogue about the primary issue. Second, once you shift gears awkwardly to the subject at hand, the other person may feel blindsided — and this, in turn, makes it harder to have a casual conversation with this person in the future. Instead, find ways to make it safe to talk about the main subject of the dialogue.

2. Be curious, not furious

Most coaching dialogues have one thing in common: you usually want to tell (or, more charitably, teach) someone how to do their job better. But often the most important part of the dialogue isn't what you tell the other person, but rather what you ask them.

When police officers respond in a crisis situation, they often calmly ask lots of questions. They are trained to do this for two important reasons: first, it gives them information to help solve the problem and second, it puts you in a posture of learning how the other person is thinking - a stance that, in turn, makes this person less defensive.

Of course, not every question is a good one. Asking someone "Why did you let your backlog get so far out of hand?" is not really a question, but a criticism with a question mark at the end of it. Likewise, asking someone how work is going can be appropriate and helpful, but prying in to their personal life should be off-limits. Here are some examples of good questions to ask in a coaching dialogue:

Showing empathy: "Does it bother you when customers ramble on?"

Gathering data: "What kinds of situations take the longest to resolve?"

Opening dialogue: "I'd like to learn more about that. What was your experience?"

The right kinds of questions do more than just gather information and build rapport: they also represent a window into how an agent is thinking, which you can leverage to move both parties toward a solution, as we will see in the following steps.

3. Acknowledgement versus agreement

So what happens when you start a discussion in a safe place, and ask good questions? Sometimes it leads to productive dialogue. And sometimes, it leads to a litany of excuses and defenses. And believe it or not, that is often a very good thing. Why? Because it gives you an opportunity to acknowledge whatever they are saying and then start focusing on a solution.

Acknowledging people you do not agree with is a very powerful principle from strength-based psychology. And it goes completely against the human nature of most managers. As a practical matter, in a coaching dialogue, it means taking something that is a Bad Thing — like coming in late or falling behind on cases — and making it not seem quite so bad. Why? Because this is how you make it safe to talk about the subject, and get the other person to buy in to change.

You see, most people argue because they are trying to convince you to see the world the way they do. When you make it clear you do understand how they see the world — whether or not you agree with them — they have nothing to argue about. Compare these two exchanges:

Not good:

Stan: I was late because the dog got sick. And my kids were fighting. And I got stuck in traffic.

You: You have to understand that we have rules here about coming in on time

Stan: But you don't understand. I was having a really bad morning ...

Better:

Stan: I was late because the dog got sick. And my kids were fighting. And I got stuck in traffic.

You: Wow. Sounds like you had everything but the plague of locusts!

Stan: Yes, it seems like this happens to me a lot.

You: All of us have struggled with pets, and children, and traffic. You are far from the first person to run into this situation. So here is what we are dealing with: most people come in late once every couple of months. You are late three times a week on average. Where can we go from here?

Which of these two approaches is more likely to get Stan to change his behavior? According to Gallagher, you will have much more success with the second one: "I've seen lots more people change when they are understood instead of criticized." In the first case, where you put the agent on the defensive, you are very likely to get resistance or get "yessed" with nothing changing. In the second case, you are holding the person accountable while making it clear you understand all of his frustrations, which lobs the ball back in their court. A delicate balancing act? No, a very procedural skill.

Acknowledging the things people say involves observing its content ("I can tell this frustrates you"), validating it ("Lots of people feel that way") or identifying with it ("I wouldn't like that either"). It does not involve agreeing with it. But when you do it, you give yourself the power to be very frank about what you want to change, because you are taking away the other person's defenses and excuses. This leads us to the next and most critical step in the process.

4. GETTING THE ISSUE ON THE TABLE: JUST THE FACTS

When your favorite sports team loses an important game, how do you and your friends describe it? Probably in very emotional terms: “They choked.” “They are a bunch of losers.” “They can’t close the deal.”

The problem is, none of these statements are actually true — and more important, you can’t do anything about them. There is no such thing as an “anti-choking” drill. You can’t practice “not being a loser.” You can only fix what really happened: they made a critical penalty in the second half, they missed an important opportunity to score, or the opposing team had a stronger player in a key spot.

The same is true when you are coaching your team. Talk about someone’s “attitude,” or their ability to “get the job done,” and you’ve lost them. Shift the focus to the mechanics — like what they say to customers, or how to close a case productively — and suddenly there is hope. You have now set the stage for a positive, blame-free discussion that can change performance. Compare these two examples:

Not good:

You: You act disengaged when you are on the line with a customer. You don’t care enough.

Leslie: Hey, I’m doing my job. I don’t know what to tell you.

Better:

You: I can see why customers sometimes react badly to you. You jump right into problem-solving — but if you acknowledge a customer first, they would feel heard and probably treat you better. Would you like to try a little role-playing with me and see how it works?

Leslie: Sure, let’s give it a try.

When you turn an emotional problem into a factual one, and better yet, one that can benefit the agent — instead of being a judge grading their performance in moral terms — you get people to buy in to learning new things, instead of focusing on “covering their analysis.”

WHEN NOTHING MEANS SOMETHING

What is the best feedback when one of your star employees does something really stupid? Sometimes nothing at all.

Joe Torre, the legendary baseball skipper who has led the New York Yankees and Los Angeles Dodgers to numerous pennants and championships, points out that star players are often the strongest judges of their own behavior. In his book *Joe Torre’s Ground Rules for Winners* (Hyperion, 1999), he describes an incident where Yankees star Derek Jeter made a critical game-changing error in one game. Jeter made it a point to sit on the bench next to his coach Torre after the error, to take his lumps — and Torre responded with a light-hearted tap on his helmet, signaling the incident was over.

At a deeper level, Torre credits his success in part to the fact that he does not try to yell at, scream at, or “motivate” people. Instead, he respects his players as talented individuals, and much of his coaching takes place in the form of hundreds of short tactical meetings per year — and the goal for each of them is to troubleshoot the mechanics of his players, not criticize them.

PULLING IT ALL TOGETHER

Suppose you have an agent who does a great job, except that his script adherence is poor: he likes to “ad lib” his responses, and feels that scripts are robotic and patronizing. But the client company who uses your call center has made an issue of it, so now you need to coach him about it!

Most well-intentioned coaching dialogues would focus solely on correcting the agent’s behavior, and might go something like this:

You: You do a good job, Harvey, but there is just one thing. Your script adherence is not quite as good as it could be.

Harvey: I hate these stupid scripts. They make us sound like human answering machines.

You: But we have to follow the script or our client won’t be happy. We get graded on this. Can I count on you to follow these scripts in the future?

Harvey: OK.

Let’s translate this dialogue into what the agent hears:

You: You’ve been a bad dog, and you need to change your behavior.

Harvey: Oh, all right ... I guess.

So how would you rate the chances that Harvey will go to bed tonight dreaming with rapt attention about how to improve his script adherence? Probably somewhere between slim and none. And that is why you often keep hitting the same stuck points with the same people, over and over.

If you rewrite the script to this discussion — no pun intended — in a way that it becomes (a) painless and criticism-free, and (b) speaks to the interests of the agent, you have a much better chance of actually changing his behavior when you have your next coaching session. Let’s try this again, using the process outlined in this white paper:

Start the discussion in a safe place:

You: Harvey, walk me through what you normally say when a customer first calls with a technical problem.

Harvey: Oh, I usually just ask what I can do to help. You know I hate all that formal scripted stuff.

Ask good questions:

You: So it feels a little “stiff” to you to be using the script?

Harvey: Yeah, I feel like I’m acting like a robot instead of a live human being.

Acknowledge the other person:

You: So it sounds like you want to “be yourself” and connect personally with people.

Harvey: Exactly.

Discuss the issue factually, and benefit the listener:

You: You are raising a fair point. Even the word “script” has connotations for people, and most people in most jobs do not have to follow scripts. Our client puts a high premium on having a consistent customer experience, and they measure us on how well we follow these scripts, so they have been raising this as an issue. Where do you think we could go from here on this?

Harvey: Well, it sounds like I need to follow the script.

You: The good side of this issue is that you come across so well with customers, finding ways to share your natural personality — once you delivered a consistent opening message — would really make you stand out in a good way in the client’s eyes.

Harvey: I never really looked at it that way. Let’s see if I can keep everyone happy from here.

You: That sounds great. I suspect you will pull it off with class. I really like the rest of your work. Touch base with you next coaching session.

This dialogue is not just more positive and authentic. It follows a “script” of its own that you can learn and practice, which will eventually change your natural style of coaching. And this, in turn, will change the performance of your agents.

All told, our hope in this Parature white paper is to help you see the coaching process in a new light: as a set of skills that you can become a star at with practice, and not just the domain of those who are quote-unquote “good with people.” The side effects of good coaching ripple throughout an organization in the form of better performance, higher morale, lower turnover, and even an improved bottom line — not to mention a growing reputation for you as a leader.

As author Gallagher notes, “When you coach people well, you quickly move beyond ‘good’ and ‘bad’ employees to a world where everyone has a good foundation of skills, and knows how to execute in any situation. And when that happens across an entire service team, it is magical to watch.” Try putting some of the techniques from this white paper to work with your own team, and watch what good things start to happen.

Effective coaching — powered by Parature. Did you know that your customer service software can serve as an important part of your coaching strategy? Consider some of these approaches for putting technology to work as a coach:

Use your CEM data as coaching input. Who is really good with customer situations, and who struggles? It’s all there in your ticket history. Integrate an intelligent review of past customer transactions with your coaching, and develop a laser focus for improving the most strategic areas.

Use your system as a knowledgebase to store best practices. When one agent responds with a snippy “I have no idea sir” and another one talks elegantly about laying out options, how do you get all of your agents to sound like the second one? By capturing your best responses and best solutions as organizational knowledge, and teaching every agent how to function like your best one.

Target coaching to strategic objectives. Your service automation tools are not just a mirror of individual performance, but of organizational metrics that range from support utilization to product effectiveness. This data allows you to target coaching to specific strategic goals, ranging from agent productivity to directing clients to self-service or educational resources.

Perhaps most important, your customer service software can serve as a tool to help measure the effectiveness of your coaching efforts. From case notes to service and support trends, enterprise service automation tools can be a partner with you in reaching your ultimate goals as a service leader: higher service quality, more satisfied employees, and lower costs.

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ABOUT PARATURE

Parature enables organizations to better serve, support, engage with and retain their customers via the Web. Industry-leading, on-demand Parature Customer Service™ software provides customer service organizations with a comprehensive, multi-channel way to meet the growing expectations of their customers. With more than 10 years experience, Parature serves organizations in a wide variety of industries worldwide and helps support more than 16 million end users. Parature is among Inc. Magazine's Top 100 Fastest Growing Private Software Companies and is the recipient of numerous product, technology, and leadership awards. Today, the Parature name is synonymous with innovation and value in Web-based customer service software, strategies and best practices. Parature is headquartered in Vienna, Virginia with offices in San Francisco and the U.K. For more information, visit www.parature.com or follow [@parature](https://twitter.com/parature) on Twitter.

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