



Coaching Remote Reps to Make Better Decisions

Executive Summary

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Almost overnight, customer care throughout the world has transitioned to a remote environment. There are hundreds of thousands of representatives experiencing an intellectual and emotional rollercoaster as they adapt. In addition to the emotional toll, there are the concerns around operational execution. As reps struggle more with problem solving, there is more pressure placed on them to make decisions rather than relying on a supervisor.

The solution to doing so comes down to the three themes we explore in this paper:

- Managing reps' emotions, state of mind and locus of control
- Improving reps' problem-solving mechanics
- Building reps' confidence in daily problem-solving and decision skills

Managing Emotions, State of Mind and Locus of Control

Your reps' sense of control and outlook directly influence how they assist customers. There are three elements that determine how someone interacts with others: 1) Their ability to manage their emotions; 2) How well they control their state of mind; 3) How well they maintain their locus of control (outlook on life).

Customer encounters can be unpredictable. While most follow certain patterns, there is always a small percentage that disrupt these rhythms. The best reps deal with this discomfort by employing a three-step process. They begin by acknowledging that this discomfort will be present anytime they are making a decision with an uncertain outcome.

Generally, the more uncertainty, the more discomfort. To respond, they take a deep breath or two to reduce the physical stress they feel. They also recall the good decisions they've made in the past.

They ask themselves, "What will success look like?" In other words, what is the desired outcome? The clearer the vision they have of a successful outcome, the more effectively reps are able to focus on the most important components necessary to make the decision.

Finally, they try to anticipate the potential responses to whatever decision they make. By considering in advance the different ways a decision may play out, they are able to identify potential problems and plan what to say or do in response.

State of mind is your clarity of thinking in the moment. High performing reps have learned how to keep their state of mind in check. First, they acknowledge that "stuff" happens. This keeps things in perspective. Second, they recognize and manage the signs of stress. Third, when they are involved in an uncomfortable encounter, they learn from what happened, but they don't own it. Developing these habits enables them to maintain a positive mindset during stressful moments.

Locus of control refers to how strongly someone believes they have control over the situations and experiences impacting their lives. Some people possess an *external* locus of control, believing they have little influence over what happens. Other people have an *internal* locus of control, believing that while they don't have control over these situations, they do have control over how they respond.

Top performing reps maintain an internal locus of control. They accept that customer interactions, office politics, personal relationships, and even chance encounters with strangers will range from positive and reaffirming to tension-filled and frustrating. But as with state of mind, they embrace the positive experiences and refuse to let the negative ones puncture their upbeat attitude. So, what can customer care leaders do to ensure that those they manage maintain a healthy emotional outlook?

They Educate -- Effective managers take time to mention the impact emotions and outlook on life have on interacting with customers.

They make it part of coaching – They watch for reps' non-verbals, signaling unease or discomfort. They slow down and listen attentively when they detect a rep is struggling.

They notice the nuance – It is the little things that drive a person into a bad mood. This can be especially true as reps continue to adjust to working remotely.

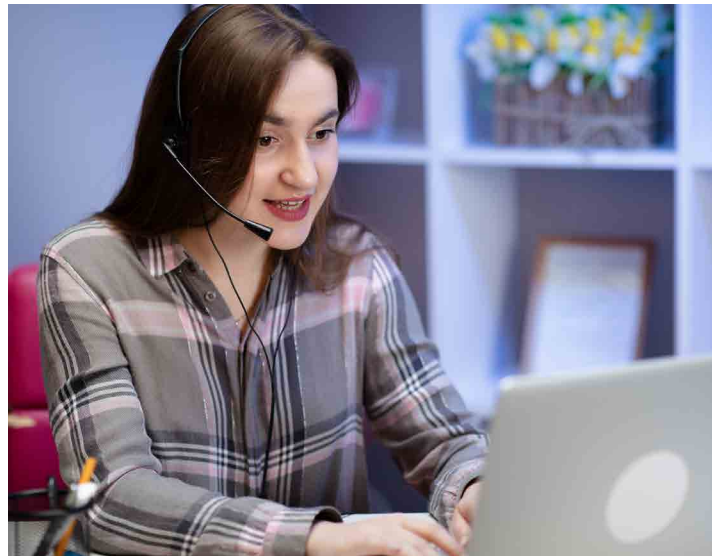
They help reps maintain perspective – It is up to leaders to be the voice of reason. They are the calming voice on the phone or video conference that helps reps manage their emotions.

They remember their own outlook – Leaders are watched for changes in their own behavior. Maintaining a positive outlook on life and a consistent demeanor will go a long way toward encouraging the reps around them.

Improving Problem Solving Mechanics

Improving problem-solving mechanics is a combination of two essential elements:

1. Mastering the steps necessary to discern the true problem, work through the options and make the best decision.
2. The confidence to use these tactics in the real-time pressures of customer care. (We will discuss this element in the next section.)



The vast majority of problems presented to reps are issues the team has seen many times before. The determining factor in a successful encounter, then, is how well the rep establishes rapport, gathers information and offers a solution. But there are those times when the customer presents an issue that doesn't fit the anticipated solutions. This is when the best reps excel. So, how can leaders improve problem-solving mechanics, especially when reps are busy answering continuous calls?

We recommend teaching them a process called the 5Cs of problem-solving:

Begin by clarifying the problem. Sometimes, the true issue is not the one initially identified by the customer. It can be tempting to jump in with a conclusion because rep has heard a similar explanation before. It is important to resist that urge.

Second, collect your resources. In the vast majority of cases, these will be at the reps' fingertips or on the screen in front of them. When the customer poses an issue where more nuanced judgment is necessary, it is important look beyond the obvious to ensure everything is being done to meet the customer's needs.

Third, consider your options. Reps should resist the temptation to accept the obvious and try to slot the customer into that solution prematurely. There can be more than one right way. In fact, sometimes the customer has a solution already in mind when they seek assistance.

Fourth, choose the best option. Acting on a decision is typically where lower performing reps feel hesitant. The best strategy for addressing these behaviors is to reassure, process and compel. In other words, “You are certainly capable of making this decision. Let’s process where you got stuck. We’re depending on you to make this kind of decision on your own when it comes up again.”

Finally, cogitate on the outcome. It is always a good idea for reps to reflect on the problems they have solved before ending the shift. What worked? What didn’t work? What have they learned? What resource did they need that they didn’t have? What patterns are they detecting?

Building Confidence in Daily Problem Solving and Decision Skills

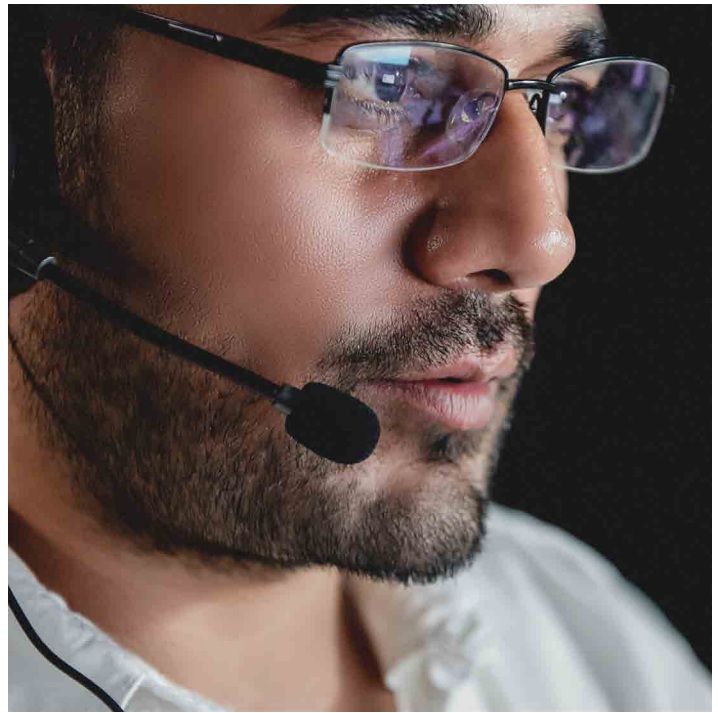
On any given day, each of your reps makes hundreds of decisions in order to resolve customers’ questions and concerns. How can you help them develop the confidence necessary to make these decisions? The effort comes down to two essential terms: empower and compel.

Empowering Reps’ Decision-Making

Provide clear parameters – When you’ve delegated a task, ask the person to explain back what they heard. Most people don’t get an entire concept or process the first time. This is the perfect time to go back and re-explain what they missed.

Provide the authority – Too many times, we delegate responsibility without clearly providing the authority. How do you express this authority?

- First, acknowledge that the rep may feel uncomfortable at first making these decisions. Most go through this evolution. It’s your job to help them along.
- Second, give examples of the decisions where reps may hesitate. Then provide steps for resolving them. If you have performed their job in the past, make a list of the typical decisions you made in that



position. Then think through the steps you took to make each one. Create a matrix or cheat sheet they can consult when they’re on their own.

- Third, step back and watch what happens. It is human nature to step in when you see someone about to make a mistake. Resist that temptation.

Reinforce the process – Rehearsal and reinforcement are critical for empowering reps to improve their daily decision game. Some will embrace these principles right away. Others may remain uncomfortable embracing their new authority. How do you get them to do this?

- Explain that you understand their apprehension. Reinforce that you’ve got their back. If something goes wrong, you’ll work together with them to resolve the situation.
- Work together on each of the processes they will need to master. This means posing situations and case studies, based on their and your past experiences.
- Stay close as they begin to implement.

Check in regularly. It's a good sign when they start pushing you away, because they have developed the confidence to act on their own.

When your reps feel empowered, they make better decisions and feel inspired to work with customers toward solutions that leave them happy and wanting to do business again.

Compel Reps' Decision-Making

"Compel" is the sweet spot between "force" and "encourage." Forcing people to perform in a particular way generally has negative consequences. Some will do exactly what is required and no more. Others will manipulate the rules and processes to beat the system.

At the opposite end of the continuum is "encourage." For people to feel encouraged, they have to feel an emotional urge to do so. It requires an emotional drive to take the initiative. Most people don't develop this drive by themselves.

When someone feels compelled to act, they feel a sense of duty or obligation to perform for the greater good. But how can you develop this desire within your customer care representatives?

Begin by practicing think-alouds. Imagine a rep asking you to explain, once again, how to resolve the same customer issue. Instead of simply repeating the explanation, say, "Let's think this through together. What's the first step?" This compels the rep to think the issue through out loud.

They may resist at first, But if you persist, three things happen: 1) You get to see how the rep thinks. 2) If the rep begins to make a mistake, you can guide them back on track; 3) When the rep discovers the key insight, they will experience that "aha" moment we all do when something like this happens. This reassures them.

Second, celebrate successful decisions. Catch reps doing something right. Look for signs they're making confident decisions. Compliment them on these tactics. Let them know that you respect their decision-making.

Third, proclaim your faith in their competence.

This is most effective when done independently and discreetly. Say something like, "I know that making this decision might rattle you a bit. You've not made it before. It might not work out the way you expect. But you certainly have the skills and information to act and the ability to recover if something goes wrong. I have faith in you. You're going to do just fine."

Finally, reinforce, "I've got your back." While some may accept this readily, others will probably wait for some evidence. The trust around this will evolve over time. Reassuring reps when they may be doubting their judgment can mean the world to them.

Conclusion

The abrupt shift in the way customer care is now being delivered has shocked everyone from front-line reps to those at the top of customer care operations. While it will not remain in its current configuration forever, there will be substantial changes upon our return to a "new normal." It is too early to tell exactly what these changes will entail. But it's a good bet that many will impact the work environment of those now serving your customers from home.



About the Author

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Bob Wendover is the award-winning author of ten books who has been researching and writing about workforce trends for more than 30 years. He has served as a special advisor to the American Productivity and Quality Center

and on a number of corporate and academic studies regarding workforce trends. Since 1988, he has conducted more than 1500 speaking engagements from the towers of Wall Street to the bush of Alaska.

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