



# Coaching Remote Reps to Make Better Decisions

*Practical Strategies for the New Normal*

**Robert W. Wendover**



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# Coaching Remote Reps to Make Better Decisions

Jacquie has loved her job as a customer care representative. She's enjoyed the people around her and had a great time interacting with customers. All the answers she's needed have been provided on her screen or at her fingertips. When a customer has asked a question outside of programmed responses, a supervisor has always been close by to make a decision.

But in the past few months, EVERYTHING has changed. Jacquie no longer drives to the call center. She now does her job from her basement. Her company sent the necessary equipment to her home. They ensured her internet connection met the minimum requirements. They've provided her with an hour of Zoom-based training to help her make the transition.

For Jacquie, however, it's like another world. She has always drawn energy from the hum of colleagues assisting other customers. Now she sits in silence, except when her children run across the kitchen floor above. She's had to negotiate with her spouse, her kids and the dog about noise and interruptions. Other than customers, there's just no one to talk to. It feels like her network has been ripped away.

***Reps are experiencing an intellectual and emotional rollercoaster as they adapt to this new remote environment.***

Then there's the work itself. The call volume feels like it has doubled. Most customers sound so stressed. In addition to the normal questions and complaints, they ask about issues she's not dealt

with before. Where she used to be able to ask a supervisor and get an immediate answer, she now has to send a message and hope to get a timely response. She's been told to use her "common sense," but many times she's uncomfortable doing that. There's so much more problem solving now. As a result, she's afraid of making mistakes that will upset a customer or get her in trouble. All of this has been impacting her productivity and stress levels. Jacquie has thought about what it would be like to work from home. But now that she's been doing it for a while, she's no longer in love with the idea. There's little chance of returning to the call center anytime soon. Even when she does, Jacquie realizes there will be considerable changes. Maybe it's time to look for something different.

## The Challenges of Remote Customer Care

Almost overnight, customer care throughout the world has transitioned to a remote environment. There are hundreds of thousands of reps experiencing an intellectual and emotional rollercoaster as they adapt. This seismic shift is also having a tremendous impact on the organizations they work for:

- How does the organization manage reps working in such a tremendous diversity of remote environments?
- How does it measure productivity when there are so many new variables?
- How do managers provide "near real-time" support when communication is limited to on-line applications?
- How does the organization hire and train new reps virtually without the benefit of live interviews and screening?

- How do managers support struggling reps when they can no longer spend time observing them in real time?
- What impact will this new remote environment have on rep retention?

... and lots of other unknowns.

While they haven't doubled in number, a recent survey indicates that customer care teams have seen a 34% increase in phone inquiries, a 28% increase in email inquiries and a 24% increase in web inquiries. In addition, nearly 40% of reps report difficulty in working remotely.<sup>1</sup> This is not surprising since 52% of workers worldwide have had little or no experience working from home, including thousands of customer reps used to reporting for work at an office or call center.<sup>2</sup> This seismic shift to home-based work, compelled by the Covid-19 pandemic, has only intensified the transition.

As with Jacquie, many have developed a sense of isolation. In a survey conducted before the pandemic, only 12% of employees who work from home felt like they belonged to a team and that their role on that team was valued.<sup>3</sup> The present sense of separation has intensified this disconnect. They are dealing with their own emotions, navigating family issues and other unexpected concerns, all within a confined space, seven days a week.

***Hold times had increased by as much as 34% and escalations by more than 68%.***

In addition to the emotional toll, there are the concerns around operational execution. In one recent survey of companies, hold times had increased by as much as 34% and escalations by more than 68%.<sup>4</sup> As reps struggle more with problem solving, there is more pressure placed on them to make decisions rather than relying on a supervisor. This same study found that low-performing reps were 27% more likely to hide behind policy. So, rather than putting in the extra



effort to assist a customer, these individuals will simply stick to the rules. Over time, all of this is sure to result in a substantial increase in customer churn.

Ultimately, organizations want customer care professionals capable and confident of making the right decision at the right time. These elements are essential to becoming high-performing reps. All of this now has to be examined within the context of employees who are now working in a remote environment. How well reps are able to maintain their sense of organization, emotions, and personal outlook determines their ability to make the decisions they need to hundreds of times a week.

**Take a minute to ask yourself the following questions:**

1. On a scale of one to ten, with ten being "completely able and confident," how would you rate *each* of your reps on their daily decision-making during customer interactions? (An aggregate rating will not help, since the performance of your individual reps can vary widely.)
2. What specific attributes do your top performers possess, enabling them to handle problems and make decisions more effectively than their lower-performing co-workers?

3. What deficits do you see among lower-performing reps that impact their ability and confidence to solve customer problems and make decisions?

Even in the best times, answering these three questions is crucial to defining the challenges and opportunities you have to provide the level of care your customers demand. *But when people work remotely, you have no choice but to rely more on their problem-solving and decision skills.*

The solution to doing so comes down to the three themes we will explore throughout the rest of 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). Let's briefly explore each:

### Managing Logic and Emotions

When asked, most people will say they think logically. But they really don't. In reality, every conscious or semi-conscious decision we make is through a lens of emotion. For this reason, there is a natural tension between emotion and logic as we think things through. The first job of the brain is to keep you safe. When it comes to a physical threat, this is a good thing. But the brain can't tell the difference between a physical threat and an emotional threat. If it perceives you might face

#### Logic and Emotion

Most people say they think logically. In reality, every decision we make is through a lens of emotion. Because of this, there is a natural tension between emotion and logic as we think things through. The best decision-makers have learned how to balance this tension while assisting customers and communicating with co-workers.

#### Fostering an Emotionally Healthy Workplace

Educate on how emotions impact decisions and performance. Make emotional health part of coaching. Watch for cues that signal unease. Take time to listen. Notice the nuance. It is the little things that drive a person into a bad mood. Help others maintain perspective. Be the voice of reason and calm for others. Remember your own outlook. Managers are watched for changes in their own behavior. Your balance will impact others' balance.

#### The Brain Wants to Keep You Safe

The brain can't tell the difference between a physical and emotional threat. If it perceives you're facing uncertainty, it will trigger stressor hormones. It will also introduce thoughts of all the things that can go wrong. The key is developing the perspective to take these encounters in stride and manage these discomfort signals.

### Managing Emotions in the Workplace

#### Manage Decision Discomfort

Acknowledge the discomfort you will feel in making the decision. Ask, "What will success look like?" to get a clear vision of your desired outcome. Anticipate what could happen and prepare for those possibilities. If dealing with people, prepare for how they might respond. Rehearse what you're going to say so it comes out right when you say it.

#### Manage Your State of Mind

State of mind is your clarity of thinking in the moment. The best decision-makers have learned how to keep their state of mind in check, especially when the unexpected happens. They acknowledge that "stuff" happens. They recognize and manage the signs of stress. They learn from uncomfortable encounters, but don't own them. They refuse to take responsibility for others' emotions.

#### Your Locus of Control

How do you view the world? Some people believe they are at the mercy of whatever happens to them. Others believe they can determine how they respond no matter what happens. Which one are you? The best decision-makers learn to manage how they respond to life events. As a result, they get better outcomes.

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uncertainty, embarrassment, hurt feelings, or other stressful emotions, it will trigger the release of two stressor hormones, adrenaline and cortisol. The resulting discomfort discourages you from acting on a decision, even if you've logically concluded it's a good one.

Customer encounters can be unpredictable. While most follow certain patterns, there is always a small percentage that disrupt these rhythms. Handled successfully, these encounters can be a source of energy. But if a mistake is made or the customer reacts in a hostile manner, the frustration, embarrassment, or disappointment can drag you down for the rest of the day. The uncertainty of this at the beginning of every interaction can drain a rep's energy and focus. Until the rep has developed the perspective to take these encounters in stride, it will impair their thinking.

## ***The best reps become students of errors.***

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. Anticipating and accepting the presence of this discomfort enables them to keep it in perspective. Put simply, they have grown comfortable with being occasionally

uncomfortable. To respond, they take a deep breath or two. This accomplishes two objectives: 1) It decreases the impact of physical discomfort by dispelling the adrenaline and cortisol. 2) It compels them to think a decision through before reacting impulsively. They may also remind themselves of other times they have dealt with similar decisions and the positive outcomes that resulted.

Secondly, 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. They know it's rare to have a perfect encounter. But as long as the overall outcome meets the criteria necessary, they consider the decision a success.

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 that might obstruct what they plan to say or do. (Over time, they also become students of the errors they make and look for patterns of what typically works and what doesn't.)



When it comes to interacting with others, high performing reps rehearse what they plan to say. By doing so, they increase the probability that what they *want* to say will be what they *actually* say in the heat of the moment. They do this by writing down the customer questions they aren't as comfortable answering. Then they develop appropriate responses and rehearse those responses off-line. This increases the probability



they will respond effectively when the question or concern comes up again. The key to these three steps is building them into a routine methodology that kicks into gear every time a decision needs to be made and implemented. Managers can help them do this by reinforcing these ideas during coaching and staff meetings.

## Managing State of Mind

State of mind is your clarity of thinking in the moment. How many times have we all let our emotions get the better of us? High performing reps have learned how to keep their state of mind in check, especially when the unexpected happens.

First, they acknowledge that “stuff” happens. This keeps things in perspective. We’re all clumsy at times. We all get lost at times. We all say the wrong thing at times. We all get delayed. The people around us, including customers, have these same things occur. But most of these obstacles are no big deal. So why let them dominate one’s thinking?

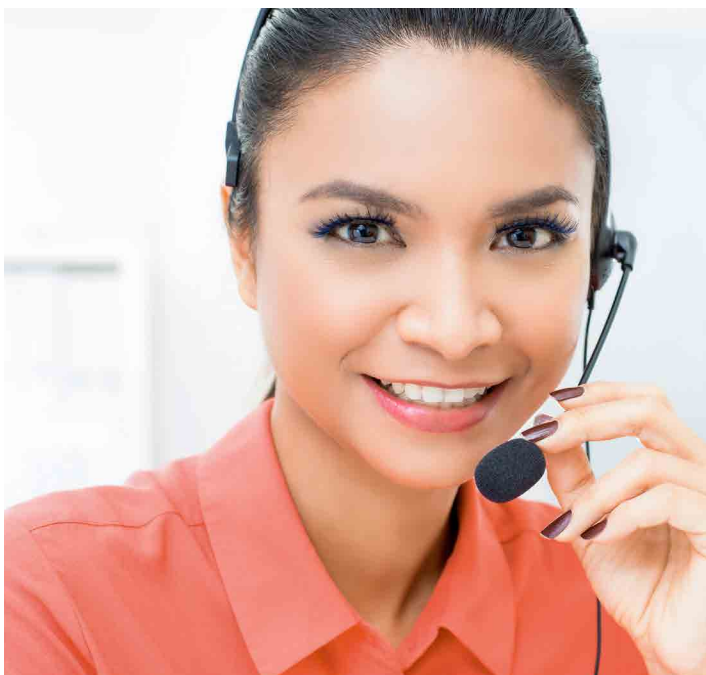
Second, top performing reps recognize and manage the signs of stress. When the unexpected happens, it’s easy to slip into worry

and frustration. But rather than acting on these emotions, these reps stop to evaluate. They acknowledge the adrenaline and stress hormones impacting their nervous system. Something as simple as changing posture can instantly change their state of mind. This allows for a more rational response, or maybe no response at all.

Third, when they are involved in an uncomfortable encounter, they learn from what happened, but they don’t own it. Refusing to take responsibility for others’ emotions allows them to remain calm and think rationally when the unexpected happens. All of this is easier said than done, of course. But developing these habits of mind enables them to turn the corner on managing their state.

## Managing Locus of Control

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. Some might say it’s the difference between being optimistic and pessimistic.



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. Sure, bad stuff happens. But they expect that a reasonable solution will be found anyway. They make every customer decision with the expectation of a positive outcome.

Conversely, lower performing reps seem to expect things to go wrong. They utter phrases like, “This always happens to me,” or “I figured that was going to happen.” When confronted with an impatient or frustrated customer, they are more likely to take that person’s caustic comments to heart. They assume unexpected problems will have to be escalated. They say, “I’m sorry” more often without having a solution or alternative in mind. At the end of a shift, they are more likely to say, “I’m glad that’s over.” As mentioned above, they are more likely to seek solutions by checking with a supervisor than getting creative themselves. They often expect that no matter they say or do, the customer still won’t be happy.

When hiring and coaching customer professionals, one of the most critical assessments a manager

should make is determining the person’s outlook on life, since this has a material impact on the way they will solve customer problems and make decisions. Examining a person’s locus of control, state of mind and ability to manage discomfort will provide insights on how to approach their training, coaching and support.

We all struggle with our emotions at times. Reps, however, come in contact with a much wider variety of personalities than most people. Therefore, it is crucial they successfully navigate their own emotions and the emotions of others. After all, a rep in a bad mood can alienate any number of customers during a single shift.

So, what can customer care leaders do to ensure that those they manage maintain a healthy emotional outlook? Here are five simple suggestions:

*Educate* – We’d all like to think that people maintain awareness of their emotions. But there is ample evidence this is not true. Effective managers take time to mention the impact emotions and outlook on life have on interacting with customers. Feel free to distribute copies of the infographic on page five to those you supervise. Then walk them through it and discuss how they can use this information to improve customer interactions. ([It is available for download here.](#))

*Make it part of coaching* – Simply asking, “How’s the day going?” can elicit signals that all is not well. Watch for reps’ non-verbals signaling unease or discomfort. *Slow down and listen* to what they have to say. In today’s productivity-oriented environment, it is easy to blow past a troubled look or comment and miss the real reason why a rep is struggling to make the best customer decisions. You don’t have to be “father confessor.” Just a patient listener.

*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. Their rhythm may be off. The number of distractions around them has increased. They may feel out of sorts. All of these disruptions and

more can impact decision-making and customer rapport.

*Help them maintain perspective* – None of us has experienced a pandemic before. In fact, many reps have not experienced anything this serious before. While most can keep it in perspective, it will feel all-consuming for some. It is up to you to be the voice of reason. Being the calming voice on the phone or video conference that helps them manage their emotions. As a result, they might very well become a calming influence during customer interactions.

*Remember your own outlook* – How's your thinking in the midst of these challenges? Like it or not, managers are watched for changes in their own behavior. The emotions you feel, the state of mind you maintain, not to mention your outlook on life will go a long way toward encouraging or discouraging the reps on your team.

## Improving Problem Solving Mechanics

Over the past 20 years, we have all become more reliant on screens to make decisions. On one side, this “menu-driven thinking” enables us to solve many routine problems. On the other hand, this reliance has resulted in the deterioration of the trial-and-error skills essential to making the best decisions. Our youngest customer professionals have come of age with a mobile device welded to their hands. As a result, they no longer feel compelled to “figure” stuff out. When presented with life's problems, they seek the answers on screen. But as mature thinkers know, it takes more than answers to solve problems. It requires judgement.

***When a lead says to a rep,  
“think for yourself,” that  
person may not be  
comfortable doing so.***

Truth is, we're all less likely to venture past programmed responses these days. When a supervisor says to a rep, “think for yourself,” that person may not be comfortable doing so. As this has happened, reps have grown more and more dependent on those in charge to resolve issues not found on the screen. In our new age of remote work, this has become significantly more difficult.



After all, they can no longer look over their shoulder and ask a question. So, how can customer care managers foster a culture of resourceful and independent thinking?

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. Given these patterns, organizations typically develop resources and even programmed answers for resolution. While customers do not like to feel they are being handled, most recognize that a lot of the questions they ask have been asked many times before. The determining factor in a successful encounter, then, is how well the rep establishes rapport, gathers information and offers a solution. Once reps have mastered

## The 5Cs of Problem Solving

*Ask most people how they solve everyday problems and they can't tell you. The 5Cs of Problem Solving is a simple process for solving everyday problems more systematically.*

### Clarify the problem.

Make sure you solve the right problem. When working with customers, be patient and listen all the way through their description. Once the customer has finished, reflect back what you heard to make sure you heard it correctly. If they correct you, ask clarifying questions.

Most resources are on the screen in front of you or at your fingertips. But sometimes a customer will pose an issue where more nuanced judgment is necessary. Rather than saying, "I don't know," say, "That's a great question. Can I have a couple of minutes to research this?"

### Consider your options.

Many times, an immediate solution will come to mind. Resist the temptation to accept the obvious. Don't get married to the easiest fix. There can be more than one right way to resolve a problem. The best option fixes the problem and makes the customer happy.

Uncertainty in choosing the best option can make you hesitate. There is calculated risk in all decisions. If you have clarified the problem, collected your resources, and considered your options, you can be confident choosing the best option. The best decision-makers act with confidence but prepare for unexpected outcomes.

### Cogitate on the outcome.

Cogitate means to reflect. Always reflect on how decisions turned out. What didn't work? What did you learn? What resources were you lacking? What patterns are you seeing? Keep a record of these insights. They will help you in the future.



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### Collect your resources.

### Choose the best option.

this process, they are well on their way to becoming top performers.

But there are those times when the customer presents an issue that doesn't fit the anticipated solutions. It might be a request the rep has not heard before. It might even be a request no one in the organization has heard before. Of course, given society's focus on immediate answers these days, the rep is still expected to come up with a resolution almost instantaneously. In these situations, reps need to leverage their decision skills and confidence. So, how can you improve problem-solving mechanics, especially when reps are busy answering continuous calls?

## Teach Them a Process

Ask the average person how they go about solving everyday problems and they won't be able to tell you. Most customer care reps are no different. As explained earlier, it is human nature to act impulsively, being guided (manipulated) by our emotions and outside influences. But making decisions when working as customer care reps requires them to be tactical.

I recommend a process I call the 5Cs of Problem Solving:

*Begin by clarifying the problem.* Sometimes, the true issue is not the one initially identified by the customer. Some individuals also take a long time to get to the point. It is essential to be patient and listen all the way through their description. It can be tempting to jump in with a conclusion because you've heard a similar explanation before. Resist the urge. Once the customer has finished their explanation, it important to reflect the issue back to them to ensure it has identified correctly. If necessary, a couple of clarifying questions can be asked. It is important to wait until the customer is finished, however, rather than interrupting his or her initial explanation.

*Second, collect the 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. This is especially true if the issue has already been escalated. While exceptions, of course, should not become the rule, sometimes customer retention trumps a hard-and-fast process. It is important for reps to know those resources are there for rare occasions.

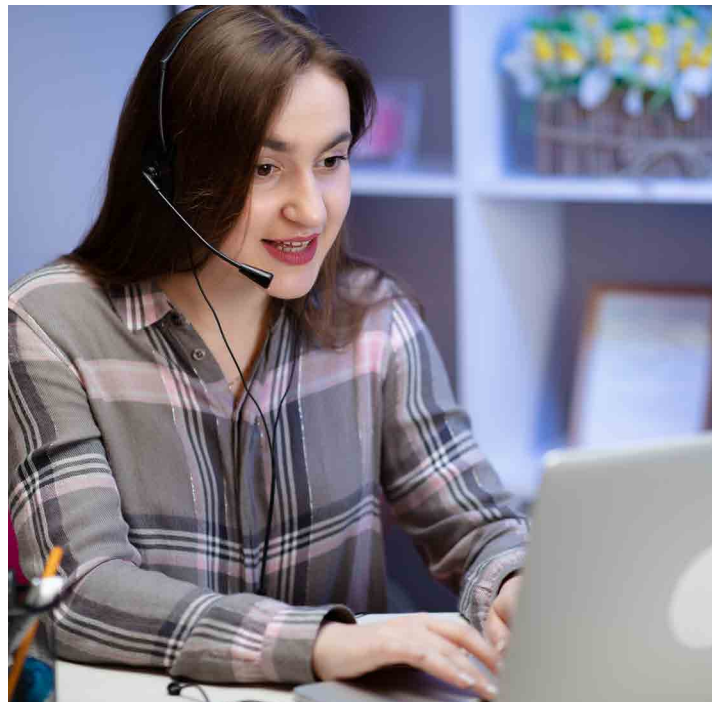
*Third, consider the options.* Many times, an immediate solution comes to mind as the customer is explaining the situation. Reps should resist the temptation to accept the obvious and try to slot the customer into that solution prematurely. As the customer is explaining the issue, high performing reps jot a few notes on the options that come to mind. But they are careful not to get married to the one that's the most obvious or the easiest fix. It may not turn out to be the best fit. It is important to remember too, that there can be more than one right way. In fact, sometimes the customer has a solution already in mind when they seek assistance. The easiest way to determine this is to ask, "How would you like us to resolve this?" Their resolution might be easier and less expensive than what the rep had in mind.

*Fourth, choose the best option.* As mentioned before, acting on a decision is typically where lower performing reps feel hesitant. This can especially be true now while working remotely. The uncertainty of not knowing the outcome in advance can defeat their confidence. It is crucial, therefore, to meet them where they are when they feel apprehensive about taking this kind of risk. This delay in decision-making can take several forms. They may chat up the customer rather than taking action. They may attempt to escalate a call when handling the issue is within their training and skills. They may "accidentally" disconnect the call, hoping someone else will handle it when the customer calls back. 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.* (Cogitate simply means to reflect.) It may not be possible to cogitate

after each customer encounter. But 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? Some reps keep a sheet of paper next to them to jot one- or two-word reminders about problems they need to cogitate on at the end of the day.

It is easy to recognize that many times reps do not have the opportunity to consciously proceed through a five-step process when there is an impatient customer at the other end of the call. But once this process has become ingrained in the rep's mind, it becomes natural to use it as a framework to guide conversations and resolutions.

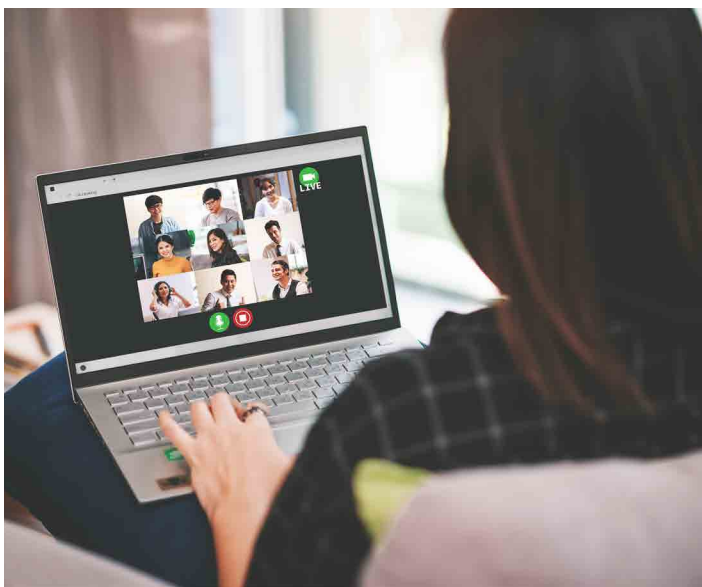


In addition to offering reps a framework for problem solving, offer them the words they can use to establish trust and rapport with the customer. This so-called "advocacy language" can take many forms. Here are a few examples:

- "Let's see if we can figure this out together."
- "Let's see how we can come up with a good solution."

- “I understand your concern. I’ll do everything in my power to help you.”
- “Let’s work together to come up with the best resolution.”

Finally, encourage reps to rely on each other for insights. While this “network judgment” has been a part of customer care training for a long time, the new demands of working remotely is forcing every organization to look for technological ways to deliver these strategies. Modern collaboration tools like Slack® and instant messaging offer means for reps to connect in near-real time to obtain advice and perspective from co-workers. In addition, develop a central source of strategies. One firm uses what they call a “shared team inbox” to offer comments and insights that might be helpful to co-workers.<sup>5</sup> There are a number of applications which can facilitate this process including Zapier® and Guru®. The key to this is getting reps to embrace its use. Managers should refer to it before simply answering questions. Be sure to mention it during pre-shift meetings and in mini coaching sessions. You might even offer an initial incentive for use such as rewarding the first 100 people who contribute insights to the platform.



Improving problem-solving mechanics should be an on-going effort. If everyone works collaboratively, the firm will see an increase in both customer and employee retention.

## 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. Most are routine and have been executed thousands of times. This repetition evolves into the mastery necessary to adapt quickly in each customer interaction. But then there are those unexpected inquiries that can disrupt a rep’s momentum in a heartbeat. We’ve all experienced the fear of making the wrong decision, even though we pretty much knew what to say or do. Top performing reps possess the confidence move past this fear and navigate to a successful solution.

Many others, however, struggle to adapt. This is especially true for those unexpectedly working remotely. Much of this apprehension can be attributed to a lack of confidence in their ability to solve problems and make decisions, especially in the stress of the moment. So, how can you help these reps develop more confidence? The effort comes down to two essential terms: empower and compel.

### Empower Reps’ Decision-Making

Customer care reps must exude confidence, so the customer believes that the rep is fully capable of helping with whatever issue they have brought to the call. In order to do this, the reps need to feel empowered to act, regardless of the situation.

So, what does it mean to empower someone? First, it’s the ability to *discern*. In the workplace, this means being able to examine the elements of a situation, evaluate what needs to be accomplished and determine the steps for doing so. You can share some universal principles with someone about how to solve problems, but the ability to discern is developed over time as the result of trial and error.

Second, it is the ability to *manage uncertainty*.

Uncertainty produces stress. As mentioned above, the best decision-makers become comfortable with being uncomfortable. Any decision of significance generally involves some uncertainty.

Third, it is possessing the skills to *recover from what goes wrong*. Decisions don't have answers. They have outcomes, some of them unexpected or unwanted. Top performing reps know that you don't go through life making the best decision every time. When things go wrong, they are comfortable taking a step back, evaluating what happened, and developing a fix.

Fourth, empowerment is the confidence to *act independently*. Top reps take initiative without asking for permission. They are constantly scanning the environment for what needs to be done. They make a practice of thinking three and four steps ahead. As a result, they are more likely to be rewarded with positive outcomes and a sense of control over situations others may find overwhelming.

The key element connecting all four of these attributes is confidence. In the majority of cases, the reps you lead will have a pretty clear idea of what decision needs to be made. Increasingly, however, more and more of society is focusing on blame when something goes wrong. This has many people hesitating, not wanting to suffer the embarrassment, even humiliation, of perceived failure. For this reason, an increasing number of reps now seek permission before acting, even if they are clear on what to do. This is especially true of those just entering workplace.

Successfully empowering people consists of three elements. I call them the *empower principles*.

*Provide clear parameters* – When you've delegated a task, ask the person to explain back what they heard. Chances are, you'll find gaps in their understanding. 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. Then reinforce what they need to learn

### **Provide Clear Parameters**

When you've delegated a task, ask the rep to explain back what they heard. Chances are, you'll find gaps in their understanding. Most people don't get an entire concept or process the first time. Reinforce what they need to learn through practical application. Hint: Asking, "What questions do you have?" is more effective than asking, "Do you have any questions?" Asking "what" sends the message that questions are expected.

### **Provide the Authority**

Sometimes, we delegate responsibility without clearly providing the authority. As a result, those on the front-line are confused about how far they can go. Acknowledge that they may feel uncomfortable at first. Give examples of decisions where reps may hesitate. Then provide steps for resolving them. Create a cheat sheet they can consult. Resist the temptation to step in when you see someone about to make a mistake. Every rep has to develop their own confidence.

## ***Empowering People to make the best decisions***

### **The Attributes of an Empowered Decision-Maker**

Empowered decision-makers possess the ability to examine the elements of a situation, evaluate what needs to be accomplished and determine what to do. Second, they have the ability to *manage uncertainty*. The best decision-makers become comfortable with being uncomfortable. Third, they have the skills to *recover from what goes wrong*. When things go wrong, top reps are comfortable taking a step back, evaluating what happened, and developing a fix. Fourth, they have the confidence to *act independently*. Top decision-makers take initiative without asking for permission. They make a practice of thinking three and four steps ahead. The key element connecting all of these attributes is confidence.

### **Reinforce the Process**

Rehearsal and reinforcement are critical for empowering. Some may remain uncomfortable embracing their new authority. This is generally more about emotion than intellect. Explain that you understand their apprehension. Reinforce that you've got their back. Work together on each of the processes they will need to master. But be careful not to make the decisions for them. When they start pushing you away it is because they have developed the confidence to act on their own.

### **Foster Network Judgment**

Employ apps such as Guru® or Zapier® to create a home-grown knowledge base that reps can refer to when searching for resources to solve problems. Encourage reps to contribute ideas and information they gather from customer encounters that can help other reps address the similar issues. If necessary, provide incentives to get reps to contribute their ideas and encourage use during staff meetings and coaching sessions.

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through a bit of practical application. This extra effort will also encourage them to ask questions about other issues over which they may be confused. (Hint: Asking, “What questions do you have?” is more effective than asking, “Do you have any questions?” Asking “what” sends the message that questions are expected.)

*Provide the authority* – Too many times, we delegate responsibility without clearly providing the authority. As a result, those on the front-line are confused about how far they can go in making exceptions. How do you express this authority? Here are the three steps:

- First, acknowledge that they may feel uncomfortable at first making these decisions. Say, “You may feel uncomfortable making these decisions at first. Don’t worry, I’ve got your back.” Most reps go through this same 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. Sure, the people and situations will vary, but the steps for making the decision remain the same. You might even create a matrix or cheat sheet they can consult when they’re on their own. Those who are too reliant on “rules” will require more coaching than those who possess confidence in their ability to think things through.
- 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. If they begin to believe that you will “save their butt” every time something is about to go wrong, they will become afraid to act or become careless.



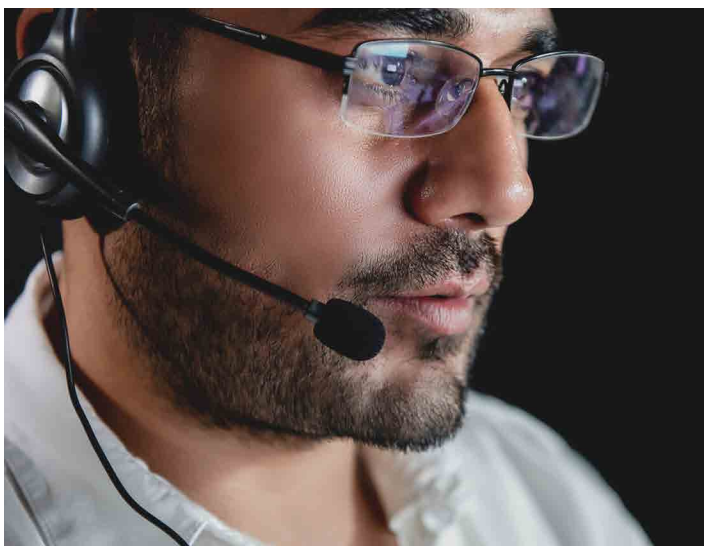
Bottom line? Every rep has to develop confidence in their own reasoning.

*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. This is generally more about emotion than intellect. In other words, they understand what they’re supposed to do, but uncertainty and fear of failure or blame is holding them back. These individuals will require more time and patience and encouragement. How do you get them to do this? Here are a few ideas.

- Explain that you understand their apprehension. We’ve all been there. 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. That said, be careful not to make the decisions for them. 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

You can empower your reps all you want. But if they don't feel comfortable acting independently, nothing will be accomplished. You have to compel people to make decisions. I use the word "compel" because I believe it is the sweet spot between "force" and "encourage." Forcing people to perform in a particular way has consequences. Some will do exactly what is required and no more. Others will manipulate the rules and processes to beat the system. Still others will feel discouraged that you don't trust them to think.

At the opposite end of the continuum is "encourage." A library of books has been written on how to encourage people. But for people to feel **a** encouraged, they have to feel deep-rooted urge to do so. It requires an emotional drive to take the initiative. This is why feeling compelled to act is the sweet spot between force and encourage.

Think about the times you have felt the urge to take the initiative. It might have been because someone you believed in asked you to do so. Perhaps you were in a situation where you thought a friend or colleague was being treated unjustly. Maybe a set of circumstances came together where you finally said "enough." This is the power of compel. Good leaders get others to act with a balance of logic *and* emotion.

Let's translate this into your workplace. When you

## Compelling People to Make the Best Decisions

If reps don't feel compelled, they won't make the best decisions. They have to feel a deep-rooted urge to act independently. This is difficult to accomplish. Perhaps they are unsure of their skills. Maybe they lack confidence. Perhaps they have seen other reps blamed when something went wrong. Here's how to foster their sense of volition and determination.

### Think-Alouds

Don't repeat instructions if a rep asks over and over. Instead, say, "Let's think this through together. How should we begin?" This compels them to think the issue through out loud. If you persist, 3 things happen: 1) You see how the rep thinks; 2) If the rep begins to make a mistake, you can get them back on track; 3) When the rep discovers the key insight, they will have that "aha" moment.

When you detect a lack of confidence, say, "Look, I know making this decision might rattle you a bit. Some stuff might not work out the way you expect it. But we all go through those times and come out the other end with more confidence. You have the skills to act. I have faith in you."

**Proclaim  
Faith  
in their  
competence.**

### "I've got your back."

Reassuring reps when they may be doubting their judgment can mean the world to them. This trust will evolve over time. As others watch this take place, it will reinforce the trust they have placed in you as well.

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.

**Celebrate  
successful  
decisions.**

### Process their progress.

There is nothing like getting specific feedback. Meet regularly with each rep to review their progress as decision-makers. Then list a couple of detailed instances where you have observed their decision-making and how it improved the customer's experience.



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think of compelling the reps around you, what does that look like? Let's examine some possible attributes.

- Reps who anticipate the next step in a process rather than stopping once the original task has been completed.
- Reps who ask customers whether there is anything they can do, and *really* mean it.
- Reps who go the extra mile in helping others, pitching in whenever they perceive a need.
- Reps who collaborate without being asked.
- Reps who speak up when they have concerns, rather than just going with the flow.
- Reps who encourage others in small but significant ways. Over time, they are perceived as points of light in the organization.

Who, in your workplace, behaves like this? What else do they do that illustrates how they feel compelled to contribute?



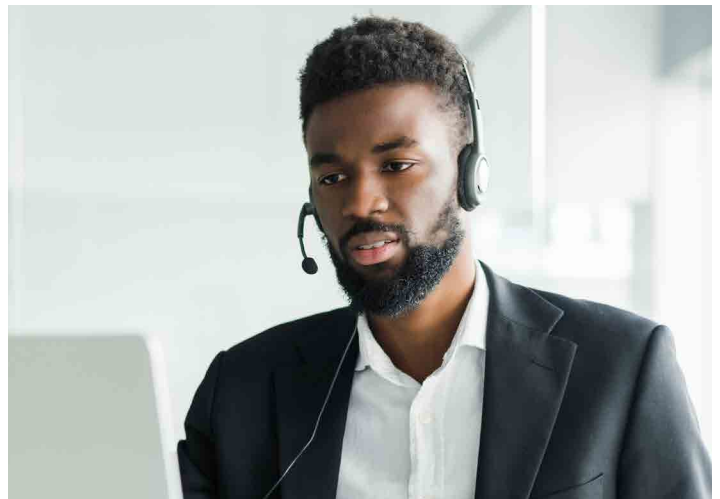
Not everyone feels compelled to make the best decisions. In most cases, however, this is not apathy or laziness. It just that no one has ever lit the right kind of fire under them. Perhaps they are unsure of their skills. Maybe they lack the

confidence to act on their own. Sometimes it is a fear of blame. Perhaps they have seen other reps get blamed when something went wrong even though it wasn't really the person's fault. All of these factors and others dissuade people from acting.

All of the reasons just mentioned are tied to emotion, not logic. So, how do you compel the reps you lead to make decisions independently when working remotely?

*Begin by practicing think-alouds.* Imagine a rep asking you to explain, once again, how to resolve the same customer issue. Resist the urge to repeat your instructions even though it might be more expedient. Instead, say, "Let's think this through together. How should we begin?" This compels the rep to think the issue through out loud.

Initially, he or she may be hesitant to do so. But here's the magic – If you persist, three things happen: 1) You get to see how the rep thinks. That can produce all kinds of insights; 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. When they do, you get to share it as well. There's nothing like this one-to-one celebration.



By the way, this practice also discourages lazy questions. When reps discover they will no longer be given the answer without being put through the "think-aloud" process, they will become more diligent about acting independently.



*Second, celebrate successful decisions.* In other words, catch them doing something right. Reps work one-on-one with customers. So other than customer reactions, it is hard for them to tell how they're doing. As you review their conversations, look for signs they're making confident decisions. Remember, it's not just the outcome the customer cares about, it's the rapport. When a friendly and competent rep works with them, they are much more likely to remain a customer. The keys to this rapport are the little decisions that the rep makes as they get to know each customer. Compliment them on these tactics. Let them know that you respect their decision-making.

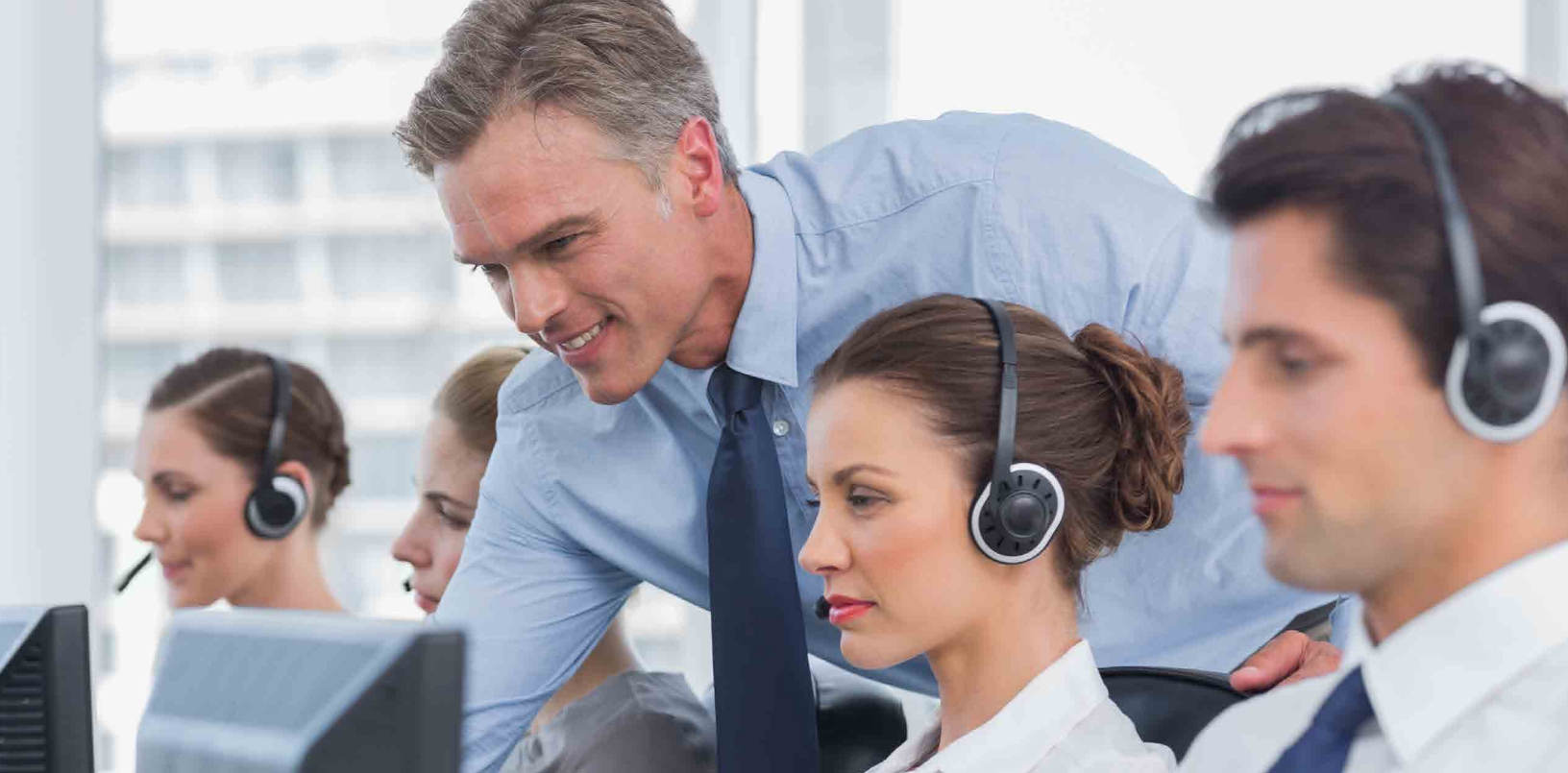
*Third, proclaim your faith in their competence.* When was the last time someone proclaimed faith in your competence? You may feel it's not necessary. You're accomplished, financially secure, have a clear career direction and lots of Linked-In connections. But most people don't. When you consider that more than 40% of US workers are living paycheck to paycheck, you can understand why we could all use more encouragement.

This is most effective when done independently and discreetly. Imagine, for instance, that someone has approached you about an issue

they're attempting to solve. Even after the two of you have worked it through, you still detect some uncertainty or a lack of confidence. This is a great time to say something like, "Look, I know that making this decision might rattle you a bit. You've not made it before and, yes, something might not work out the way you expect it. But we all go through those times and come out the other end with a new-found confidence. You certainly have the skills and information to act. I have faith in you. You're going to do just fine."

*Fourth, reflect and process their progress periodically.* This can be especially true for those somewhat new to the workforce. It is critical to meet with each rep individually to reflect on their progress as decision-makers. You might begin by saying, "I just wanted us to take a few minutes and reflect on how I have watched you mature in your decision-making skills." Then list a couple of specific instances where you have observed this. The point of this effort is more for support than critique.

*Finally, reinforce, "I've got your back."* As I mentioned previously, it is essential that those with whom you work understand that you will back them up in their decisions. While some may accept this readily, others will probably wait for



some evidence. The trust around this will evolve over time. But it can be lost in a moment if you fail to back them up when their decision-making is called into question or a decision they make results in a bad outcome. Reassuring reps when they may be doubting their judgment can mean the world to them. It will also reinforce the trust others have placed in you.

## Conclusion

The abrupt shift in the way 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.

***The close-in contact that reps have enjoyed with leads has been drastically altered. Much of it will never return.***

Ask yourself the following three questions:

1. What should we be taking away from the information and insights contained in this paper?
2. What steps should we be taking to assist with the transition from call center to home-based work?
3. What can we do to better instill a sense of confidence in those who are struggling to solve problems and make decisions in this new environment?

As we have discussed throughout this paper, this new normal will take a toll on both rep emotions and care implementation for quite some time. One upshot of this will be that customer care reps will assume more decision-making responsibility in their daily interactions. After all, the close-in contact that reps have enjoyed with supervisors in call center settings has been drastically altered. Some of it will never return. When they can’t reach out for immediate assistance, these reps will have to become more self-reliant. Some will thrive in this new environment. Others will struggle to adapt. This is where remote decision coaching will become all the more crucial.



## Endnotes

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