



# Learner Workbook

## LP7: Contact Centre Performance and Coaching

Learner Name and Surname	
Learner ID	
Company / Branch	
Date	
Learner Signature	

SAQA ID 10321: Monitor and maintain performance standards in a Contact Centre; NQF Level 4, 12 Credits


SAQA ID 10327: Provide coaching to personnel within a Contact Centre; NQF Level 4, 10 Credits

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## Class Activities

During and after the initial training the learner will be required to complete a number of activities. These activities will be both individual and group activities (class activities formative activities). The activities are numbered and are to be included in the learner's portfolio of evidence. These activities will measure the progress of the learner through the programme. For authenticity reasons these activities must be handwritten.

 <p><b><i>Class Activity 1: Apply statistical understanding to performance targets</i></b>          Complete the following in small groups / individually as per the instructions from your facilitator:</p>	10321.1 10321 EEK1 10321 EEK4
1. In your small groups, discuss and list all the systems you use at work to gather information for your MIS	
2. In your small groups, discuss and list the key benchmarks used in your Contact Centres	

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3. Explain how your organisation would measure First-call resolution

4. In your small groups, brainstorm and create a list of essential computer skills for a contact centre agent

*Place any extra evidence after this page, clearly marked for easy reference.*

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**Class Activity 2: Review performance and record performance discrepancies**

Complete the following in small groups / individually as per the instructions from your facilitator:

10321.2.1  
10321.2.2  
10321.2.3  
10321 EEK2  
10321 EEK3  
10321 EEK5

1. In your small groups, brainstorm and create a Policy and Procedure for Annual Performance Reviews

Document ID	Title <b>Annual Performance Review</b>	Print Date
Revision	Prepared By	Date Prepared
Effective Date:	Reviewed By	Date Reviewed
	Approved By	Date Approved

Applicable Standard: **None**

**Policy:**

**Purpose:**

**Scope:**

**Responsibilities:**

**Procedure:**

**1.0 Eligibility**

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**2.0 Approved System****3.0 Performance Management System****Revision History:**

Revision	Date	Description of changes	Requested By

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Date

2. Explain the role of the manager in the Performance Review process

3. The class will be divided in groups of two. Use the Performance Review Template in the Annexure section of your Learner Guide to create a “Performance Review” for a staff member. Role play the Performance Review with one of you playing the staff member and the other the supervisor. Remember to use all your communication skills. After 10 minutes, swop roles.

Use the template provided on the next page for this task.

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## Performance Review

### Personal Information

Name		Review Manager	
Position		Job Title	
Department		Last review date	
Location		Review Period	
Current salary		Start date	

### Review Type (Please circle as appropriate)

Self / Individual

Managerial

Peer

Subordinate

(Sections A &amp; C)

(Sections B &amp; C)

(Section B)

(Section B)

### Reason for Review (please circle as appropriate)

Probation period

6 month

Annual

Disciplinary

Other

### Current Responsibilities

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## Section A - Individual to complete

### An Overview

*Be completed by the appraisee prior to the meeting.*

**Things I did really well**

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**Things that I do well generally**

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**Things I'm not good at**

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**Things I want to get better at**

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**What I would have done differently**

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**Key learnings**

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**What I'd really like to do**

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## Section A - Individual to complete

### Training Review

Consider any training (internal/external/on the job) you have undergone since your last review. How successful do you feel it was in achieving the objectives? How successfully have you been in applying the knowledge/skills learnt to your job? What improvements can you suggest? The training undertaken can also be attributed to CPD accreditation.

Name of course	Date	Comments

**What further training would be useful?**

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Learner Signature	Date
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## Section A - Individual to complete

### Feedback to your Manager

You will be given the opportunity to discuss the ways in which you feel “Your Manager” (or other Managers) could help you do your job more effectively.

“Your Manager” will be expecting to discuss issues which you feel he/she should:

#### Continue Doing

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#### Start doing

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#### Stop Doing

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Learner Signature	Date
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## Section B - Manager to complete

### Performance Rating Scale

Please refer to this rating scale as you review performance.

- 5      Significantly above the acceptable standard. Regularly goes over and above the call of duty. Adds significant value to the team. Achieves success beyond the established range of duties.
- 4      Above acceptable standard. Performance is above what is generally expected for this role. Regularly demonstrates initiative and commitment in delivering quality work.
- 3      Acceptable standard. Performance meets all the job requirements. Fully successful in all aspects of the job. Reliable and a safe pair of hands.
- 2      Below acceptable standard. Performance meets some of the job requirements. Skills and knowledge require development in order to be fully effective in all aspects of the job.
- 1      Significantly below standards. Performance does not meet the required standards for the position. Immediate action is necessary.

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## Section B - Manager to complete

### Performance Factors

#### General Approach to Work

(Enthusiasm, commitment, initiative, determination, reaction to pressure)

1                      2                      3                      4                      5

Comments

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#### Communication – Written and Verbal

(Clear, concise, confident, accurate, focused)

1                      2                      3                      4                      5

Comments

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#### Problem Solving

(identifies problems in timely manner, analyses information, initiates solutions, resilient)

1                      2                      3                      4                      5

Comments

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Learner Signature	Date
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## Section B - Manager to complete

### Planning

(prioritises, sees projects through to conclusion, keeps projects on track, realigns where necessary)

1                      2                      3                      4                      5

Comments

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### Technical Knowledge

(Takes on new skills, understands role and where it fits in organisation, keeps abreast of competitors)

1                      2                      3                      4                      5

Comments

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### Teamwork

(Open, shares ideas freely, contributes to team spirit, collaborates with others)

1                      2                      3                      4                      5

Comments

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## Section B - Manager to complete

### Managing people

(Provides direction, values others contribution, proactive approach, leads by example)

1                      2                      3                      4                      5

Comments

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### Client Management

(knows needs of people, maintains confidence, manages expectations, responds to needs, adds extra value)

1                      2                      3                      4                      5

Comments

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### Initiative

(self develops, proactive in taking on challenges, promotes quality, displays original thinking)

1                      2                      3                      4                      5

Comments

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## Section B - Manager to complete

### Growth Objectives and Strategy for Achievement

In consideration of the individual's role and responsibility, please address those areas where continued growth and development will contribute to successful job performance. Specify follow up steps facilitating their achievement. Follow up steps should include exposure to new challenges, training, shadowing, practicing, reading etc.

Company Objectives	KPI'S	Help

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## Section B - Manager to complete

### Summary

Assign the appropriate overall rating describing the individual's performance by consolidating results. The overall rating is not simply an average of all the categories, since the importance of each factor can differ by position. Be sure to consider the weighting of each item accordingly when determining the overall category selected.

- 5      Significantly above the acceptable standards
- 4      Above the acceptable standards
- 3      Acceptable performance
- 2      Below acceptable standards
- 1      Significantly below standards

(Circle as appropriate)

Summary:

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**Section C – To be completed by both the individual and  
manager following the performance review**

**Individual**

Comments:

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Signature: \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_

*The individual's signature does not indicate complete agreement with this evaluation, but acknowledges that the discussion took place.*

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Manager

Comments:

Signature: \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Next Review:

Learner Signature	Date
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4. Identify the performance appraisal method used in your organisation

5. In your small groups, brainstorm and create an advanced benchmark calendar for the review.

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6. In your small group, discuss and create steps that will help you make the performance review meeting more interactive and productive.

7. Create rules that will help you avoid resentment when conducting Performance Reviews

8. Follow the facilitators instructions and complete the “Power of Positive Feedback Exercise”

My notes:

*Place any extra evidence after this page, clearly marked for easy reference.*

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***Class Activity 3: Identify and record opportunities for improvement and coaching***

Complete the following in small groups / individually as per the instructions from your facilitator:

10321.2.4  
10327.1

1. In your small groups, brainstorm ideas to help you develop a foundation for effective coaching

2. Explain how you would conduct a needs assessment

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3. The fundamental goal of performance management is to promote and improve employee effectiveness. Explain what an effective performance management system should look like

*Place any extra evidence after this page, clearly marked for easy reference.*

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**Class Activity 4: Select a coaching methodology and technique**

Complete the following in small groups / individually as per the instructions from your facilitator:

10327.2  
10327.3.2  
10327 EEK1  
10327 EEK2  
10327 EEK3  
10327 EEK4

1. Identify the coaching techniques that are available to your organization. Select the techniques with which you are comfortable in order to optimize coaching effectiveness.

2. List 4 key identifiers of Formal and Informal coaching

Formal coaching	Informal coaching

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## 3. Provide descriptions for the following Coaching techniques

Coaching Technique	Description
Whisper coaching	
Barge-in coaching	
Conferencing	
One-on-ones	
On-the-spot	
Peer-to-peer	
Side-by-side-shadowing	
Self-assessment	
Quiz	

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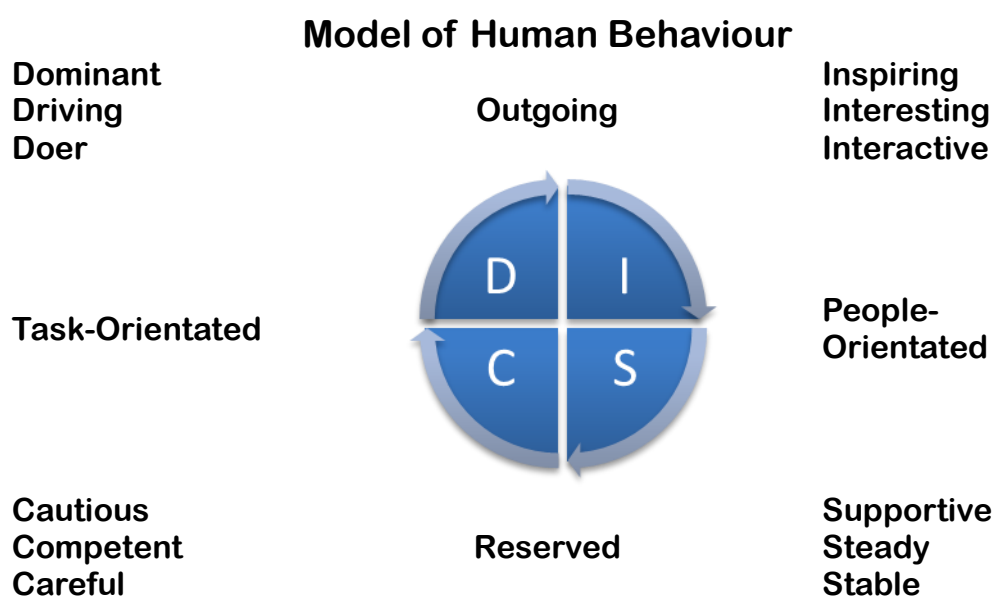
4. In your small groups, discuss and list things that you should remember when communicating in writing

5. Give an example from your workplace which illustrates how knowing the different NQF levels and their descriptors can play a role in making your coaching intervention more effective:

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6. Using the Model of Human Behaviour, identify your own personality type




Can you identify the personality types of people reporting to you?

What value would this information hold for you in coaching others?

*Place any extra evidence after this page, clearly marked for easy reference.*

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 <p><b>Class Activity 5: Coach staff</b> Complete the following in small groups / individually as per the instructions from your facilitator:</p>	10327.3 10321.3.1 10321.3.2
<p>1. Follow the facilitators instructions for the “Eliminate Negative Talk” exercise</p> <p>My notes:</p>	
<p>2. Divide into the same pairs used in the previous role play exercise. The one person will play the role of the agent and the other the role of the supervisor. The agent is keeping their cell phone on during their work shift albeit on silent. This is against company policy. The agent has a sick parent at home. Have a coaching for improvement discussion with the agent. After 10 minutes, swop roles.</p> <p>Remember to following the steps for coaching for improvement, such as:</p> <ul style="list-style-type: none"> <li>• Define the performance problem.</li> <li>• Invite the employee into the discussion.</li> <li>• Collaboratively create the plan for improvement. The improvement plan should cover these points:</li> <li>• Manage by plan and do your follow-ups.</li> </ul>	

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3. List the quality metrics that drive customer satisfaction in your contact centres

4. Explain the difference between informal and formal coaching

5. In your small groups, create a coaching framework

*Place any extra evidence after this page, clearly marked for easy reference.*

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**Class Activity 6: Maintain benchmarks consistently**

Complete the following in small groups / individually as per the instructions from your facilitator:

10321.3.3

1. Explain what Call Centre benchmarking is

2. List and explain the Benchmarking categories

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3. From the following list, select a benchmarking approach that you would use when benchmarking and then explain why you have selected it:

1. Participating in industry events, such as forums and online best practice webinars
2. Getting involved in site visits
3. Purchasing industry data reports
4. Conducting mystery shopping exercises
5. Keeping a log of data in the public domain
6. Commissioning research
7. Conducting customer surveys
8. Enter award programmes

*Place any extra evidence after this page, clearly marked for easy reference.*

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### Reflection

Individually complete the following:

10321  
10327

The purpose of reflection is for you to consider what you have learnt and how you will use it in the future. Answer the following questions as honestly as you can:

1. After the training programme, I can now (tick):
  - ☐ Apply statistical understanding to performance targets
  - ☐ Review performance
  - ☐ Implement performance standard benchmarks
  - ☐ Identify development areas within a Contact Centre context
  - ☐ Select coaching techniques and methodology
  - ☐ Coach Contact Centre personnel
2. How would you apply what you have learnt during this skills programme in the workplace?

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3. What was the most significant thing you have learnt in this programme?

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4. What do you think you still need to learn more about? (Action Plan)

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5. What did you enjoy most about the training?

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6. If there was something about the training that you could change, what would it be?

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### Facilitator Observation Checklist

10321  
10327

The facilitator needs to provide feedback on the participation of each learner in the class:

The purpose of the facilitator observation checklist is to provide the learner with feedback about his/her participation during the formative class activities and also to highlight the observed strengths and perceived weaknesses that the learner displayed during the workshop and/or learning programme.

The facilitator is required to complete the Facilitator Observation checklist for each learner in his/her Learner Workbook. The learner needs to sign-off the document to confirm that he/she has received the observation feedback.

Learner Name			Facilitator Name			Date	
Class Activity	Group / Individual	Completed ✓x	Participation			Comments on perceived strengths and weaknesses of the learner	
			😊	😐	😞		
1. Apply statistical understanding to performance targets							
2. Review performance and record performance discrepancies							
3. Identify and record opportunities for improvement and coaching							
4. Select a coaching methodology and technique							

Learner Signature	Date
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Class Activity	Group / Individual	Completed ✓ x	Participation			Comments on perceived strengths and weaknesses of the learner
			😊	😐	☹	
5. Coach staff						
6. Maintain benchmarks consistently						
7. Reflection	Individual					
Has the learner sufficiently demonstrated application of the following CCFO's during the facilitated session?						
<b>CCFO1:</b> Identify and solve problems in relation to performance reviews and corrective action initiatives Identify and solve performance problems in which coaching responses display appropriate critical and creative thinking	<b>CCFO2:</b> Work effectively with others: during the reviewing and implementing of performance standards to enhance team work as a member of a coaching or supervisory team	<b>CCFO3:</b> N/A		<b>CCFO4:</b> Collect, analyse, organise and critically evaluate information: and statistics pertaining to performance standards related to the identification of areas of coaching required		
Yes / No	Yes / No	Yes / No		Yes / No		

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<b>CCFO5:</b> Communicate effectively: with individuals with regard to benchmarks, performance feedback in oral or written formats with learners during the process of coaching	<b>CCFO6:</b> Use science and technology effectively and critically using computer software packages to access and reformulate information and statistics		<b>CCFO7:</b> N/A	<b>CCFO8:</b> Awareness of: the importance of: reflecting on and exploring a variety of strategies to learn more effectively thereby improving performance standards the importance of: reflecting on and exploring a variety of strategies to learn more effectively to enhance coaching efforts
Yes / No	Yes / No		Yes / No	Yes / No
<b>Statement by the facilitator:</b> The learner has demonstrated sufficient knowledge and skill during class to proceed with the summative assessment ( <i>circle</i> )	Yes	No	<b>Additional comments: (optional)</b>	
<b>Learner Signature</b>			<b>Facilitator Signature</b>	

Learner Signature	Date
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