Overview:
The Monthly Performance Review is a regularly scheduled meeting to review the agent’s past month’s KPI performance and progress against goals. Here, the supervisor and agent agree on goals for the upcoming month and an action plan on how to accomplish the goals. Throughout the month, the supervisor inspects target goals during quick laps and side-by-side coaching. The monthly performance review meeting is also the time to check in and mentor the agent on career development goals.

This is a highly-interactive session onsite at your location and exclusively for your employees. We will teach attendees to coach to your KPIs. We will provide classroom training followed by onsite mentoring to help attendees work better with their team members.

*Must meet pricing minimum

Availability:
- Method: Instructor-Led
- Duration: 2 Day(s)

Course Objectives:
After completing this course, a student will be able to:
- Understand the front-line manager’s role in coaching
- Review how the monthly one-on-one meeting works
- Know how to be effective at setting and communicating high-performance expectations
- Introduce the step-by-step guide to an effective monthly one-on-one meeting
- Learn how to prepare for and conduct the monthly one-on-one meeting
- Build game plans with agents to reach individual and customer service team goals
- Apply the monthly one-on-one meeting to different situations

Course Outline:
Participants should expect the following business outcomes:

Net Promoter Score
- Set expectations for customer service delivery. Review current state, provide feedback and action plans on CSAT

Target Audience:
Director, GM, Manager, and Supervisor

Course Prerequisites:
Attendees should first take the following courses:
- Identifying Root Cause Through Data-Driven Decision Making
- Making Behavior Stick Through Skill Transfer
survey.

Average Handle Time
• Set expectations for AHT requirements, review current state and develop action plans.

After-Call Work
• Set expectations for after-call work requirements, review current state and develop action plans.

Schedule Adherence
• Set expectations for schedule adherence, review current state and develop action plans.

Close Rate
• Set expectations for close rate performance, review current state and develop action plans.