Agent Coaching Form

Complete during or right after the session, with the agent. Pick one focus behavior per session. Write observations as what was said or done on the call, with call IDs, not opinions. Both parties sign; the agent keeps a copy.

SESSION DETAILS

Agent name and employee ID

Team / queue / line of business

Coach name and role

Session date and length (minutes)

Agent tenure

☐ Nesting (first 30 days on floor) ☐ 1 to 6 months ☐ 6 to 12 months ☐ Over 12 months

Session type

☐ Side-by-side (live calls) ☐ Recorded call review ☐ QA score review

☐ KPI / scorecard review ☐ Follow-up on previous coaching ☐ Recognition / positive coaching

Call or interaction IDs reviewed

CURRENT PERFORMANCE SNAPSHOT

QA score (last 30 days) vs target

Average handle time vs target

First contact resolution vs target

Customer satisfaction / NPS vs target

Schedule adherence vs target

Other metric relevant to this session

WHAT WENT WELL

Specific behaviors to keep doing (with call ID and timestamp)

FOCUS BEHAVIOR FOR THIS SESSION

Focus area

- ☐ Call opening and verification
- ☐ Discovery / questioning
- ☐ Empathy and tone
- ☐ Hold and transfer handling
- ☐ Product or policy knowledge
- ☐ Resolution and ownership
- ☐ Compliance disclosure
- ☐ Call control and handle time
- ☐ Sales or retention offer
- ☐ After-call work and notes
- ☐ Other

What was observed (exact words or actions, call ID, timestamp)

Impact on the customer and on the metric

Agent's view (in their own words)

AGREED ACTIONS

What the agent will do differently (specific and observable)

Support from the coach or team (practice, job aid, listening to model calls, system access)

How progress will be measured

Follow-up date

FOLLOW-UP RESULT (COMPLETE AT NEXT SESSION)

Outcome

☐ Improved: behavior consistently observed ☐ Partly improved: continue coaching

☐ No change: revise plan ☐ No change after repeated coaching: refer to performance process

Evidence (calls reviewed, metric change)

ACKNOWLEDGMENT

This form records a coaching conversation intended to support the agent's development. It is not a disciplinary document. Agent signature confirms the conversation took place, not agreement with every point; the agent may add comments below.

SIGNATURES

Agent comments

Agent signature

Date

Coach signature

Date

Date