COACHING GROWTH

Supervisors' playbook

XYZies –

INDEX

Introduction and objectives

The purpose of this playbook is to have guidelines to our supervisors.

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Welcome to the supervisors' team!

You are now part of the XYZies team. We are thrilled to have you joined our dynamic team, committed to excellence in sales within our call center.

As sales supervisors, your role is pivotal. You will serve as the bridge between our talented sales representatives and the broader management. Your expertise, guidance, and leadership will empower our team to achieve targets, uphold policies, and deliver exceptional results.

Together, we'll create a vibrant environment where collaboration, innovation, and growth thrive. Feel free to reach out to me or any team member if you have questions or need support. Let's embark on this exciting journey together!

Your mission

Your mission is to empower our team to become customer champions. We achieve this by providing ongoing coaching and development, fostering a positive and competitive environment, and driving results through effective call monitoring, performance analysis, and goal setting. By building a highly skilled and motivated team, we will exceed sales targets, cultivate long-lasting customer relationships, and position our call center as a key driver of company growth.

Your values

Customer Focus:
Customer Centricity: Prioritize understanding and exceeding customer needs in every interaction.
Relationship Building: Foster long-term, positive relationships with customers through trust and responsiveness.

Teamwork and Development:
Coaching and Development: Continuously invest in the growth and skill development of your team members.
Collaboration: Encourage open communication, teamwork, and knowledge sharing within the team.
Positive Reinforcement: Recognize and celebrate achievements, fostering a supportive and motivating environment.

Results and Accountability:
Results-Oriented: Strive for excellence in achieving sales targets and exceeding performance goals.
Data-Driven Decision Making: Utilize call metrics and quality feedback to guide coaching and improve performance.

Accountability: Hold yourself and your team accountable for achieving individual and team goals.

Professionalism and Integrity:
Ethical Conduct: Uphold ethical standards and fair treatment for both customers and team members.
Professionalism: Maintain a professional demeanor while building rapport and trust through positive communication.
Continuous Improvement: Commit to continuously learning, adapting, and improving your own skills and those of your team.

Roles and responsibilities

At XYZies, our call center supervisors play a vital role in driving our success. As a supervisor, you'll wear many hats, acting as a coach, motivator, and leader for your team while ensuring we consistently deliver exceptional customer service.

Day by day

Routine is incredibly important for a supervisor. It helps have a structured schedule, reduce decision fatigue and helps with prioritization of high impact activities, ensuring you focus on what will have the biggest impact on your team.
Start the day by greeting your team! They sure will appreciate your approach!
Plan! Always plan your day! It is crucial to be organized with the activities of each day. Make sure your pain points are not constantly impacting your routine.
Let's check what a day by day looks like for a supervisor:

1. Sales plan

Daily planning by sales call center supervisors is essential for maximizing team performance and achieving sales goals. Supervisors analyze past performance data, identify trends, and anticipate customer needs. This allows them to set achievable yet ambitious daily targets for the team, focusing on specific products or services where opportunity exists. Additionally, they can create targeted strategies for the day, such as emphasizing specific sales techniques or scripts for handling customer objections. This focused approach ensures the team is aligned and prepared to tackle the day's challenges, ultimately driving higher sales conversion and exceeding overall targets.

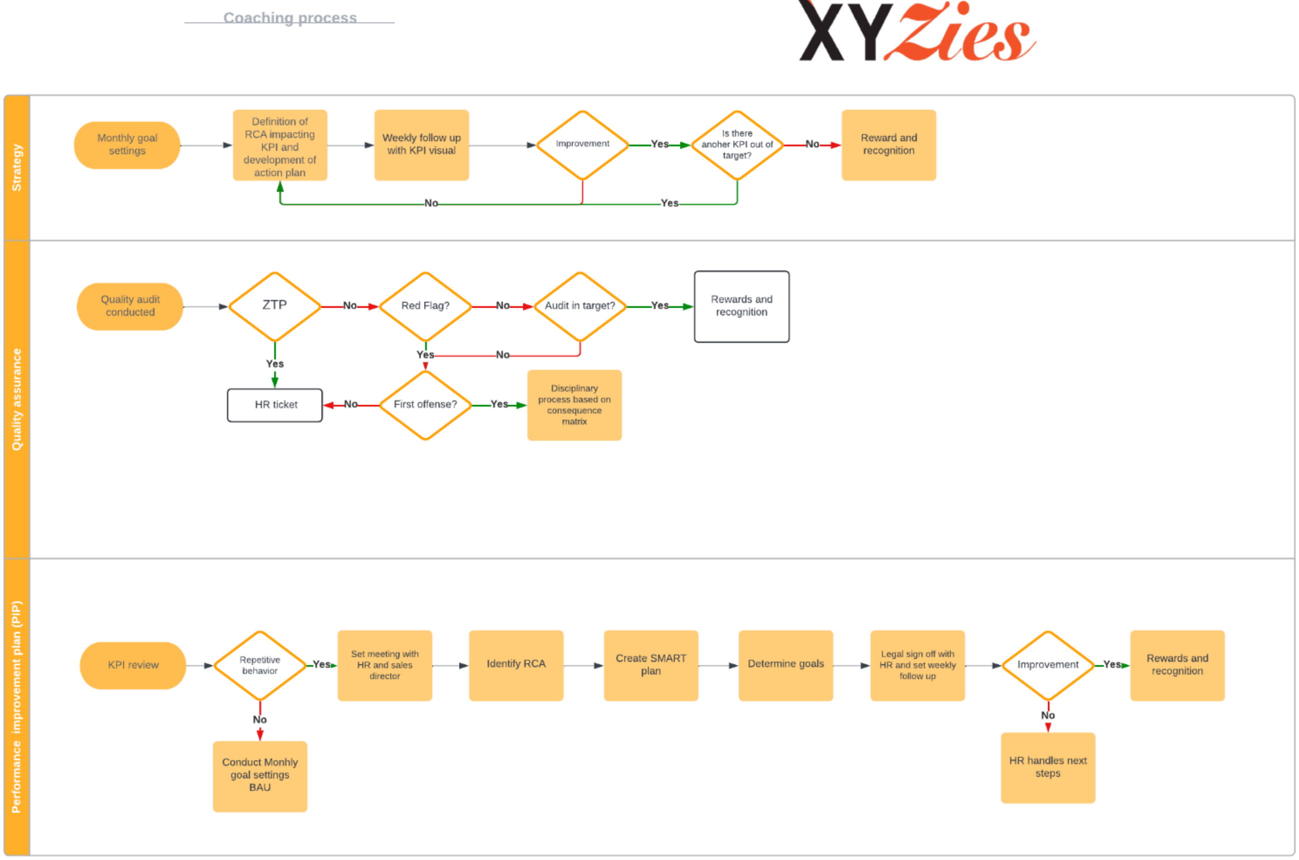
How to do it?

- Review MTD results. For this purpose, you can use DOMO. Use the day before information to COL Dashboards > COL Agent Profile New > COL Agent Performance Detail - Domo
- Validate insight from QA or conduct audits daily to identify behaviors impacting performance.
- Look for the day's agents scheduled and plan side by side sessions or/and any developmental activity that can help drive performance.

- Plan the day´s sales strategy based on the targets. Your target will not change due to absenteeism. Meaning, the rest of the team will need to cover the units those absent did not cover. Some examples of strategies to be used include:
  - Pre-call Strategies:
    - Targeted Call Routing: Based on agent strengths and customer needs, supervisors can route calls to ensure the best possible agent-customer match.
    - Daily Sales Huddle: Brief team meetings focusing on daily goals, product updates, and overcoming common customer objections can prepare agents for success.
    - Call Script Review and Refinement: Supervisors can analyze call scripts and suggest improvements based on call data and customer feedback. This ensures agents have clear and effective communication tools.
  - Call Monitoring and Coaching:
    - Active Listening Training: Equipping agents with strong active listening skills allows them to better understand customer needs and tailor their sales pitch accordingly.
    - Objection Handling Training: Supervisors can train agents on various objection handling techniques so they can effectively address customer concerns and navigate towards a sale.
  - Post-call Strategies:
    - Call Reviews and Feedback: Supervisors can review recorded calls with agents to provide constructive feedback on their performance and identify areas for improvement.
    - Data Analysis and Trend Identification: Analyzing call data like conversion rates and customer demographics helps supervisors identify sales trends and tailor future strategies.
    - Upselling and Cross-Selling Techniques: Supervisors can coach agents on effective upselling and cross-selling techniques, promoting additional products or services that complement the customer's initial interest.
  - Additional Strategies:
    - Incentive Programs and Recognition: Supervisors can implement incentive programs and recognition initiatives to keep agents motivated and reward top performers.
    - Focus on Building Rapport: Supervisors can emphasize the importance of building rapport with customers to create trust and a positive sales experience.

Make sure you document each session in ECC based on the activity conducted with your team!

COACHING PROCESS



Documenting the coaching

- Coaching observation
- Root cause
- Smart action plan
- Commitment

COACHING OBSERVATION

Detailed documentation serves as a valuable tool for both the coach and the sales representative. It provides a clear record of performance, areas of strength, and areas that need improvement. This allows for targeted coaching and personalized development plans, fostering growth and improvement in the sales representative's skills. Furthermore, it ensures transparency and objectivity in the coaching process, reinforcing trust and open communication between the coach and the representative.

Ultimately, detailed documentation contributes to the overall effectiveness of the coaching session, leading to improved sales performance and customer satisfaction.

Always include:

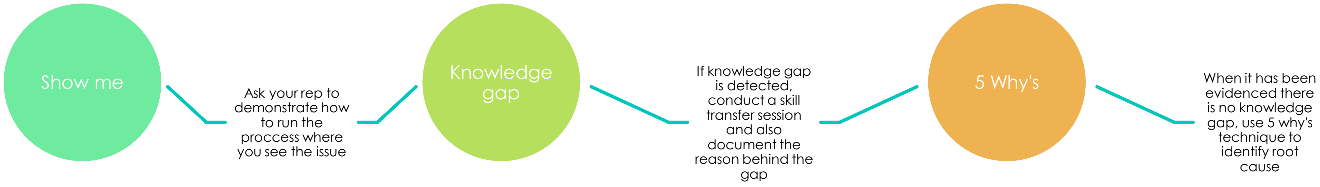
- Highlights
- Behavior observed
- Details on call types/sources where the behavior has been detected
- In the case of documenting a session targeting a particular audit or sales, do include the detail information with either call ID or Order ID

The coaching observation should be prepared always in advance. Preparation allows you to be ready for the session without distractions such as redaction. Make sure you check spelling and cover needed details.

ROOT CAUSE

Root cause analysis (RCA) is a critical component of effective coaching in XYZies. It involves identifying the underlying reasons or “root causes” that lead to certain outcomes, whether they are successes or failures.

The importance of RCA in coaching lies in its ability to go beyond treating surface-level symptoms and instead, address the deeper issues at hand. By understanding the root causes, coaches can provide more targeted and effective guidance, leading to sustainable improvements in performance.
Make sure you include in the coaching observations the root cause.



SMART ACTION PLAN

A SMART action plan is a crucial tool for setting and achieving goals in any context, especially for XYZies. SMART stands for Specific, Measurable, Actions oriented, Relevant, and Time-bound. Here’s why it’s important:

- Specific: A SMART action plan requires clear and specific goals. This eliminates ambiguity and provides a clear direction, making it easier for individuals to understand what is expected of them.
- Measurable: Goals should have criteria for measuring progress. This allows individuals and teams to track their progress and adjust their efforts as needed.
- Actions oriented: crucial as they provide clear, measurable, and achievable steps towards goal attainment, ensuring progress is trackable and efforts are purposeful.
- Resources needed: Resources can be described to bring additional details to the action plan.

- Time-bound: Goals should have a clear timeline. This creates a sense of urgency and prompts action.

Make sure to also include follow up dates and SMART GOALS

COMMITMENT

After a coaching session, both the agent and supervisor should make a commitment to ensure the effectiveness of the coaching process. Here's what their commitments could include:

Agent's Commitment

1. Adherence to Action Items: The agent should commit to implementing the agreed-upon action items in their daily work.
2. Continuous Learning: The agent should commit to ongoing learning and development, including attending any necessary training sessions or workshops.
3. Open Communication: The agent should commit to maintaining open lines of communication with the supervisor, including providing updates on their progress and any challenges they encounter.
4. Feedback Reception: The agent should commit to being open to feedback and using it constructively to improve their performance.

Supervisor's Commitment:

1. Support: ** The supervisor should commit to providing the necessary support and resources to help the agent implement the action items.
2. Follow-up: The supervisor should commit to following up on the agreed-upon dates to check the agent's progress and address any issues.
3. Open Communication: The supervisor should commit to maintaining open lines of communication with the agent, including being available to discuss any concerns or challenges.
4. Feedback Provision: The supervisor should commit to providing constructive feedback to the agent to help them improve their performance.

These commitments help to create a supportive and productive coaching relationship, leading to improved performance and job satisfaction.

Example

Here's an example of a SMART action plan provided by an agent at XYZies who wants to improve their use of the call process to increase sales:

Specific	The agent commits to consistently using the established call process in all customer interactions
Measurable	The agent aims to demonstrate adherence to the call process using strong offer and cross sales process in 90% of their calls
Actions oriented	"I will review the call process guidelines daily, practice with role-play scenarios, and seek feedback from my supervisor after each shift. This action will start on Jun 7th, 2024, until June 14th 2024 I will be sharing daily 3 to 4 calls to use as examples of call process being followed. Sup and QA will check the calls to use as examples for weekly call listening session. This action will take place from Jun 7th to June 14th.
Resources needed	LMS, Level.AI, ECC
Timebound	The agent plans to achieve this goal within the next month. Include follow up dates Agree to SMART goals to track weekly progress. If the session is a weekly follow up, check targets versus actuals and evaluate if a new action plan is required upon no improvement.

Remember, the key to a successful SMART action plan is regular review and adjustment as necessary. This ensures the plan remains relevant and continues to drive progress towards the goal. Also, keep in mind the KPI selected needs to be aligned with the agent's personal objective of improving their sales performance.

Monitor improvement plan

Behavior Identification					
Stage 1	**Task**	**Documentation**	**Sessions**	**Role responsible**	**Auditor**
Step 1	Quality assurance identifies behavior	Yes	Quality Audit / BO findings	QA Manager	QA Director
Step 2	Reports the behavior daily and weekly	Yes	Email sent to parties	QA Manager	QA Director
Step 3	Get information back from production	Yes	Reply back with corrective action	QA Manager	QA Director
Step 4	Closes the loop of the audit reported	Yes	Quality sends status reports Active/ Pending / Closed	QA Manager / QA Director	QA Director
Behavior SKILL correction					
Stage 2	**Task**	**Documentation**	**Sessions**	**Role responsible**	**Auditor**
Step 1	Training the skill / Behavior	Yes	ESP / Skill Transfer / Training workshop	Supervisor / Trainer	Sales Director
Step 2	Certify the skill / Behavior	Yes	Score acceptale behavior level	Supervisor / Trainer	Sales Director
Step 3	Remotetly certify the skill / Behavior	Yes	Score acceptale behavior level remotely	Supervisor / Trainer	Sales Director
Step 4	Follow up / Follow through	Yes	Recognition / Constructive / Corrective	Supervisor	Sales Director
Behavior Will correction					
Stage 3	**Task**	**Documentation**	**Sessions**	**Role responsible**	**Auditor**
Step 1	Set Expectations	Yes	Setting expectations	Supervisor	Sales Director
Step 2	Accountability conversation	Yes	Accountability session	Supervisor	Sales Director / HR Manager
Step 3	Disciplinary action w/ HR Final warning	Yes	Final Written Warning process by HR	Supervisor / Sales Director / HR	Sales Director / HR Manager
Step 4	Supension	Yes	HR hearing session	Supervisor / Sales Director / HR	Sales Director / HR Manager / Call Center Director
Step 5	Termination of contract	Yes	HR hearing session	Supervisor / Sales Director / HR	Sales Director / HR Manager / Call Center Director

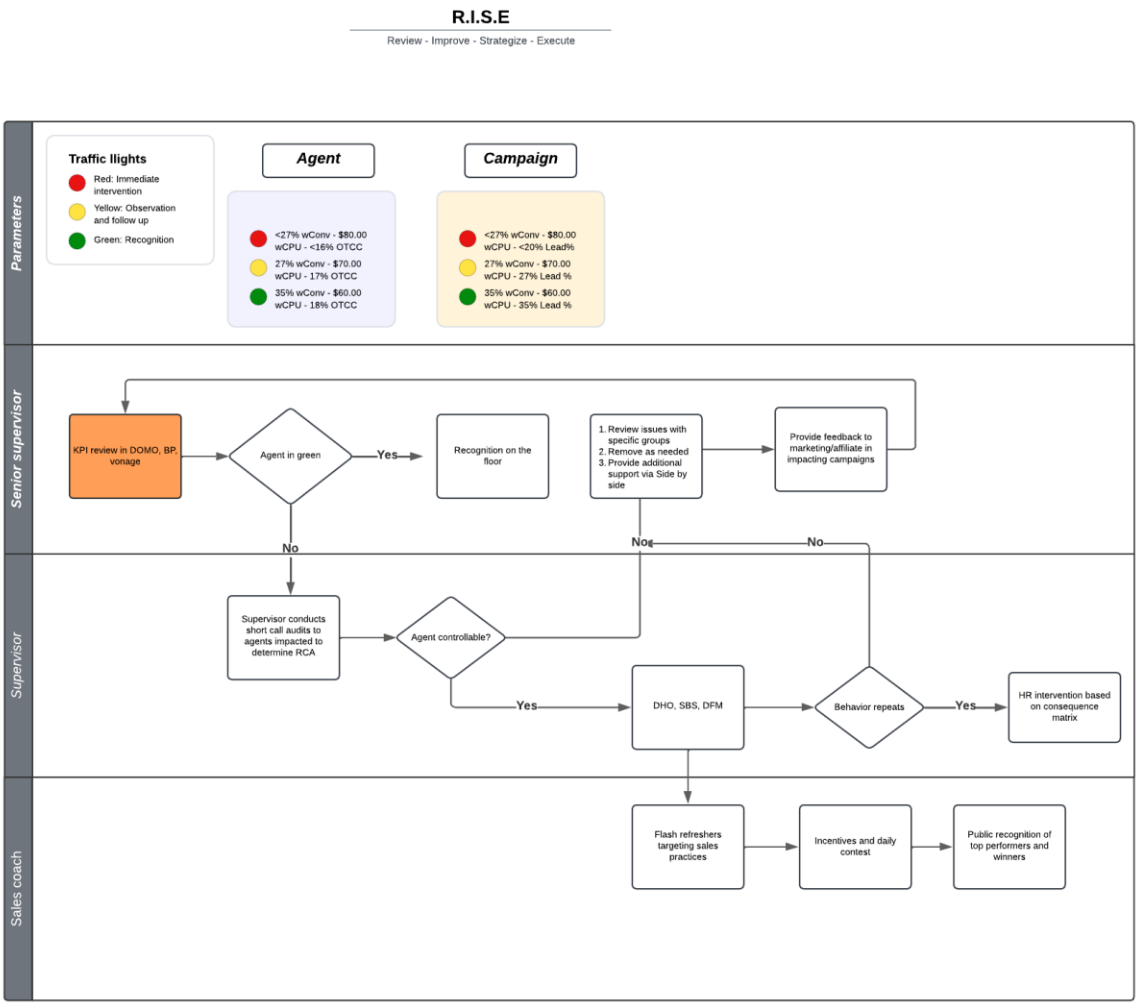
Coaching tactics to be used:

Technique	When to use	Frequency	Where to document
Acceleration huddle	Enhance existing skills Best practice sharing	Min once a week	ECC coaching
Accountability conversation	Trial session to address willingness issues	As needed	ECC coaching
DFM	Self-exploration of opportunities Issues with call handling, poor product positioning	As needed	ECC DFM
Getting to know you	New member joining the team	As needed	ECC Getting to know each other
Monthly goal settings	Goal settings with month strategy	1st week of the month	ECC Monthly goal settings
Hot laps		Daily	ECC
On the fly		Daily	NA
Rapid Fire		Daily	NA
Setting expectations		As needed	ECC setting expectations
Side by side	Real time call intervention and support. Observation of agent call and system handling	Daily	ECC side by side
DHO / Skill transfer	Demonstrate with live calls needed skills to convert sales	Daily	ECC side by side

2. R.I.S.E (Review – Improve – Strategize -Execute)

Parameters: Performance flags:

	Agent			Marketing		
KPI	**wConversion**	**wCPU**	**Order to call**	**wConversion**	**wCPU**	**Lead %**
Green	35%	$60	18%	35%	$60	25%
Yellow	27%	$70	17%	27%	$70	25%
Red	<27%	$80	16%	<27%	$80	20%



Steps

Review:
- Validate performance

Improve:
- Detect areas of improvement

Strategize
- Define the actions to be taken to control performance

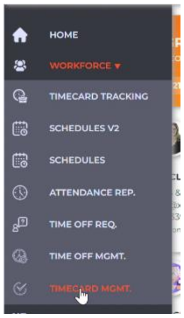
Execute
- Put in place designed actions based on RCA

3. Timecards

It is important to keep an eye on attendance, and any event that may impact your team. Keep in mind that payroll is calculated based on approved timecards of your team.
To access the timecards, enter ECC using your ID and your password.

XYZies | Home (xyzconversion.com)

Step 1. Go to WFM option then select “timecard management.”



Step 2. Select the day you are looking into approve and then, open one by one your team members.

Total scheduled time	Productive scheduled tir
79hrs 00mins	67hrs 00mins
Include all events	Total

ards of your team members.

Tracking	Status	Issues?	Details
Recording Timecard	pending		Open
Recording Timecard	pending		Open
Recording Timecard	pending		Open
Recording Timecard	pending		Open
Recording Timecard	pending		Open
Recording Timecard	pending		Open
Recording Timecard	pending		Open
Recording Timecard	pending		Open
Recording Timecard	pending		Open

9hrs 00mins
Scheduled

9hrs 14mins
Paid time

0hrs 00mins
Break time

1hrs 02mins
Lunch time

0hrs 00mins
Overtime Break

0hrs 02mins
Overtime Lunch

Once you open the timecard, validate the hours scheduled versus hours worked

Step 3. Open the day and validate if the timecard requires any updates from your end. You can also see the comments left by your agent that can help you determine if there is a need for adjustments.

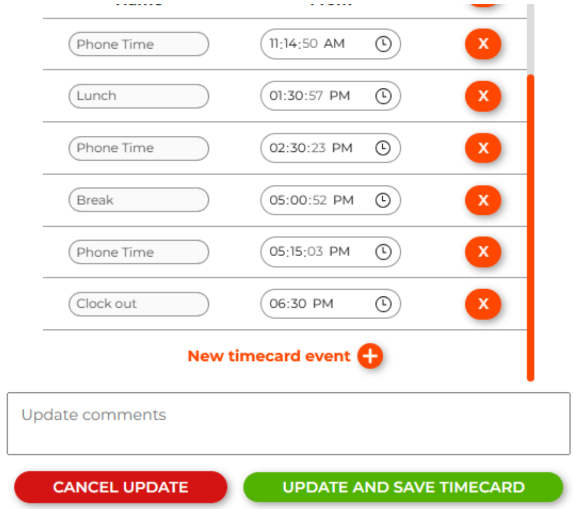
Code	Name	From	To	Total time
PT	Phone Time	09:00:08	10:58:07	01:57:58
BR	Break	10:58:07	11:14:50	00:16:43
PT	Phone Time	11:14:50	13:30:57	02:16:06
LN	Lunch	13:30:57	14:30:23	00:59:25
PT	Phone Time	14:30:23	17:00:52	02:30:28
BR	Break	17:00:52	17:15:03	00:14:11
PT	Phone Time	17:15:03	18:30:00	01:14:57
OUT	Clock out	18:30:00		

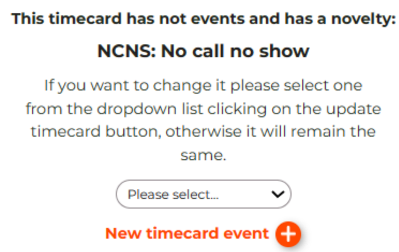
Do you have any comments for approval? (Not required)

UPDATE TIMECARD   APPROVE TIMECARD

You can update the timecard using the option shown in gray. You can create or delete events to make adjustments if any errors are validated.

Use the "new timecard event" to add any novelties. Once you are done, click on "Update and save timecard". This will NOT approve the timecard, but it will show you the hours worked so you can make additional adjustments in case needed and then approve.





In the case of NO CALL NO SHOW, you can select from the drop down the option to update the status of your agent, either because there is an email reporting the novelty or any other reason to justify the absence.

IMPORTANT!

- If your agent had a no call no show, please select the option to approve that way the timecard. This means, the collaborator did not contact the HR team nor you to report any novelty.
- If the agent indeed contacted HR or used the email or any source of messaging to contact the company to advise on the absence, but there is no medical documentation delivered and validated by the HR team, even if the representative mentioned a medical issue, you would approve timecard with "unpaid leave" and leave the comments in the blank
- If the agent later reports the medical documentation and it is validated with HR, please email Sales Director to modify and update the timecard before the cycle is over.
- Payroll cycles close on the 8th and the 20th of every month. This means, the day before all timecards should be up to date.

4. Red flags

A supervisor's daily review of red flags identified by the QA team is crucial. These red flags highlight potential issues in customer interactions, product knowledge, or adherence to processes. By promptly addressing these concerns, supervisors can prevent recurring problems, ensure consistent quality service, and ultimately protect customer satisfaction and company reputation.

Go to Red Flags follow up.xlsx (sharepoint.com) and validate if your agents have any pending flag. You will be getting an email every time a red flag is detected. You will have two categories in your red flags: Critical and Non-Critical.

What to do?

- **CRITICAL FLAG**: Validate if there was a system failure or any other issue that may have caused the error. You can dispute it by emailing the QA team and CC the sales director. The QA team will then re-evaluate and correct if needed. However, if the red flag is indeed valid, you need to create a ticket describing the issue to our HR team using form Solicitude proceso disciplinario (office.com). In here you need to use the collaborator's information, event and detailed description of the incident, call date, order ID, and even screenshots in case needed. This information will help the HR team to better understand the incident and to take any needed next steps. Once you complete this process, please reply to the red flag with the actions taken to the QA team for their tracking.
- **NON-CRITICAL**: Validate if there was a system failure or any other issue that may have caused the error. You can dispute by emailing the QA team and CC the sales director. The QA team will then re-evaluate and correct if needed. In the case the violation is confirmed, you need to proceed based on the disciplinary matrix and take the actions accordingly. You can use the document to check the steps needed Consequence Management 2024.xlsx In the case of a repeat offender and based on the type of violation, make sure to create the HR ticket to schedule a hearing including all the details of the incident(s) evidenced.

5. Attendance follow up

As a leader, you are responsible for the attendance of your team. By staying on top of attendance, supervisors can promote a healthy work environment, maintain productivity, and ensure compliance with regulations. When we have no control on absenteeism, coaching and uptraining sessions may fall behind, impacting the dynamics of your group as well.

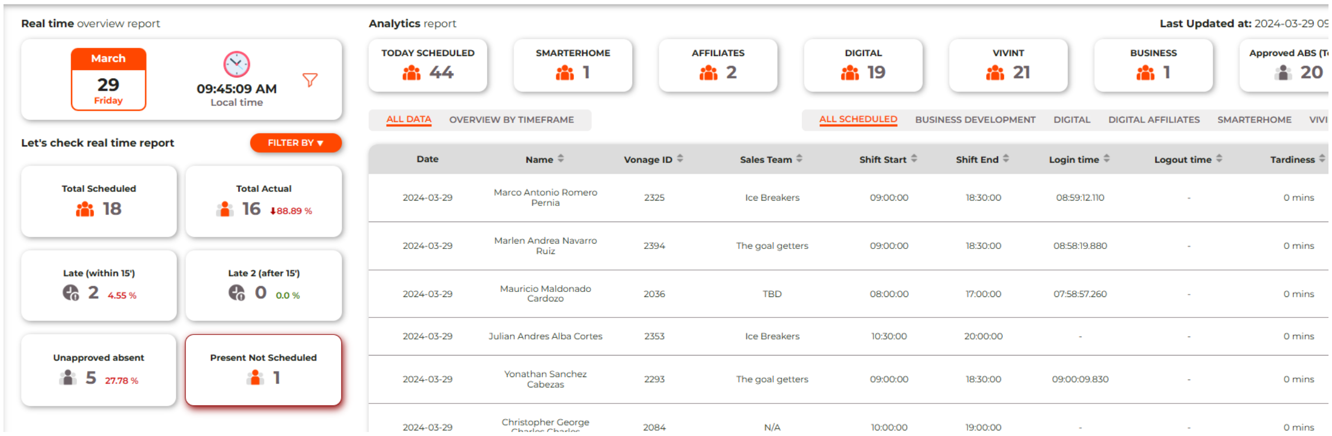
Following up on team attendance is vital for a supervisor for several reasons:

- Employee Wellbeing: Regular attendance can indicate potential issues in an employee's personal or professional life. Following up allows you to offer support, identify underlying problems, and ensure their well-being.
- Performance and Productivity: Frequent absences can disrupt team workflow and impact overall productivity. Following up helps identify patterns and address any chronic absenteeism that might hinder team goals.
- Compliance and Legal Issues: Following company attendance policies and local labor laws is crucial. Supervisors need to address unexplained absences to ensure compliance and avoid potential legal issues.

- Team Morale: Uncovered absences can lead to feelings of resentment among present team members who shoulder the extra workload. Prompt follow-up shows concern and helps maintain a positive team environment.

You can check the day before who are the agents scheduled. You can find this information in ECC or the planner done by WFM in Sharepoint.

From ECC, you can investigate agents scheduled by LOB and hours scheduled.



What to do?

- Tardiness 0-15 minutes: Identify the reason for the tardiness. Look for options to help your agent if the root cause is related to challenges meeting their current schedule. Follow the consequence matrix. In the first incident raised a verbal warning. For the second and third issue a written warning. If the following incident occurs, make sure to raise a ticket to HR for a hearing and next disciplinary step.
- Tardiness above 15 minutes: Identify the reason for the tardiness. Look for options to help your agent if the root cause is related to challenges meeting their current schedule. Follow the consequence matrix. In the first incident raised a written warning. For the second and third issue a written warning. If the following incident occurs, make sure to raise a ticket to HR for a hearing and next disciplinary step.
- Absence: If the agent does not attend on their scheduled day, try to contact them to better understand their issue. Agents need to always use email novedadesausencias@xyzies.com to notify any incidents, so, in the case no communication and no email is received, then the agent will fall in category "NO CALL NO SHOW". If you receive a novelty from the agent, do notify HR and WFM team for awareness. Raise the ticket to HR so the agent can present the relevant documentation for the absence.

6. System issues

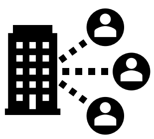
It is very frequent to have system issues related to either tool, users, and connections. It is extremely important to understand how to document and react to any scenario.

What to do?

- Determine the type of issue:
    a. Is it impacting only 1 user?
    b. Is it impacting more than 1 user?
    c. Is it an outage?
- For all cases it is important to have a clear protocol:
    a. Evaluate the cases where basic troubleshooting can be used:
        i. No network on station: Allow a couple of minutes for the connection to be reestablished.
        ii. Issues with passwords where you can do the reset (SARA plus, Vonage, Leve.AI)
    b. In case you cannot complete the basic troubleshooting then use the local IT ticket form to raise the flag. Use form Local IT tickets (office.com)
    c. When creating the ticket make sure to document properly with as much information as possible. If the issue is related to a web page nonresponsive, you need to explain further how you were attempting to reach the web site or if the error happens after a specific process. For example, if there is a portal causing errors when processing an order do not simply document with "tool does not work". This will not allow the IT team to understand the issues or start a quicker validation and instead will cause the team to have to start from scratch on their investigation. Instead, you can say "Web site unresponsive when processing payments generating error message XXXX". If possible, attach images to further document the ticket. Always include the URL of the sites you are reporting.
    d. Once the ticket is created, it is important to allow time for the IT team to be able to respond. We know we have several issues, and we are looking into prompt resolution. If you wish to have more support, you can also reach out the dedicated channel in teams called "IT support."
    e. In the case of an outage, please always include:
        i. Count of agents connected.
        ii. Count of agents impacted by the outage.
        iii. Detailed description of the issue.
        iv. Make sure you also contact the other supervisors from all LOBs, so we create a single ticket. This will avoid duplicating the efforts of the support team. Also, you need to validate if the issue is happening to all users on site. Always first communicate with your partners.
        v. Once the ticket is created, raise a communication via chat to the IT support team and program director and leadership. This can be done as well via email sharing a copy of the ticket created. If needed, the leadership team will then redirect additional communications as needed.
        vi. Be attentive to any instruction on follow up steps and additional troubleshooting. Make sure, in case of an outage, your agents remain calm in their stations until further notice.

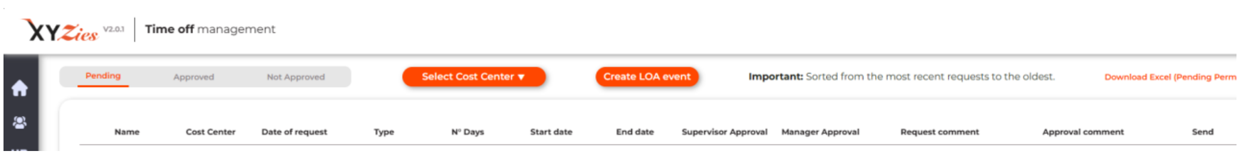
7. WFM

Following Work Force Management (WFM) processes is crucial for sales call center supervisors. These processes ensure efficient scheduling, optimal resource allocation, and adherence to break times. By adhering to WFM processes, supervisors can guarantee the right number of agents are available during peak call times, leading to shorter customer waiting times and improved customer satisfaction. Additionally, WFM processes help supervisors track agent activity and adherence to schedules, ensuring productivity and maximizing selling time. Ultimately, following WFM processes creates a smooth-running call center environment that supports both agent performance and achieving sales targets.

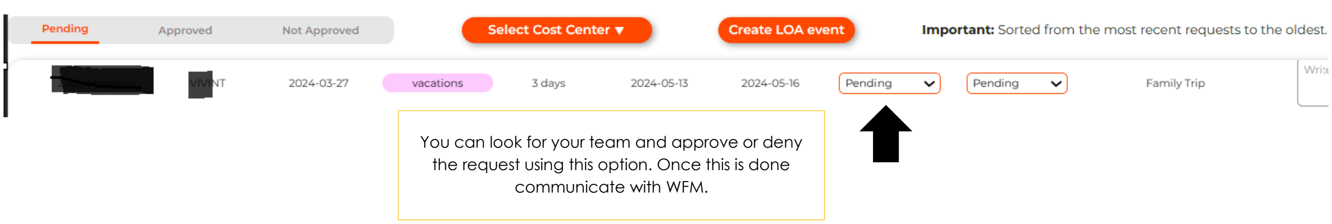


What processes does the WFM team need support with?

- Scheduling: It is important to touch base with your agents on a weekly and daily basis to ensure all reps are aligned with their schedules and are checking ECC.
- Permissions, vacations and licenses: For the WFM team to be able to plan and cover as needed any spots as required. Have your agents request any leave of absence with at least a week of anticipation and approve based on your observations. It is important to clarify, a request could be declined depending on the operational needs. Once you approve, share with the WFM team an email with the reminder of the time requested and work in collaboration with them to align the staffing compliance.



Go to WFM option in ECC and select the option "Time off management."



- Special schedules: If your agent is asking for a special schedule due to restrictions for either school, or any other issue, make sure to raise it directly to the HR team. Once they review the request, they may need to ask for documentation from the agent. After the approval is done, you can then reach out to WFM for their changes to be made so they can accommodate the staff. Please include in the email:
  - Name and ID of the agent.
  - Motive of the request (school, care of family members, medical issues, etc.)
  - Schedule required: Enter in detail time in and time out and days of the week requested.
  - Any documentation already shared by your agent such as schedules from school or legal documentation.
- Swaps: In the case your agent requests a swap for any circumstance, make sure to validate the swap covers both shifts exactly. It is important to remember all these requests need to happen at least the Friday before the event. In order for you to proceed use Sales Colombia team - Scheduling events WFM - All Items (sharepoint.com) The request will be reviewed by the WFM team and approval will be given to you via email. Once this is done you can inform your agents.

8. Disciplinary actions

All disciplinary items should be documented in ECC under the warning tool. Do you know when to start a disciplinary procedure?

Issue	Actions to take	Documentation expected
Call process fail 1st instance	Set expectations	Coaching ECC
Call process fail 2nd instance	Verbal Warning	Warning tool ECC
Call process fail 3rd instance	Written warning	Warning tool ECC
Call process fail 4th instance	HR ticket	HR form
Critical fail (NO ZTP)	Written warning	Warning tool ECC
Critical fail 2nd instance (NO ZTP)	HR ticket	HR form
Critical fail 3rd instance (NO ZTP)	HR ticket	HR form
ZTP	HR ticket	HR form
Failed to complete pitch of Vivint 1st instance	Written warning	Warning tool ECC
Failed to complete pitch of Vivint 2nd instance	Written warning	Warning tool ECC
Failed to complete pitch of Vivint 3rd instance	HR ticket	HR form
Tardiness 0 to 5 minutes 1ST instance	Verbal warning	Warning tool ECC
Tardiness 0 to 5 minutes 2nd instance	Written warning	Warning tool ECC
Tardiness 0 to 5 minutes 3R instance	Written warning	Warning tool ECC
Tardiness 0 to 5 minutes 4th instance	HR ticket	HR form
Tardiness more than 5 minutes 1st	Verbal warning	Warning tool ECC
Tardiness more than 5 minutes 2nd	Written warning	Warning tool ECC
Tardiness more than 5 minutes 3rd	HR ticket	HR form

Additional items can be found in the disciplinary matrix here *Consequence Management 2024.xlsx (sharepoint.com)*

9. PROPENSITY TO LEAVE

A propensity to leave (PTL) process in a sales call center, working collaboratively with HR, offers significant benefits for both the company and its employees. Here's why:

Benefits for the Company:

- Reduced Turnover Costs: Identifying reps at risk of leaving allows you to address their concerns proactively. This can involve additional training, schedule adjustments, or addressing compensation issues, ultimately retaining valuable talent and saving on recruitment and onboarding expenses.
- Improved Employee Engagement: A PTL process demonstrates that the company values its employees and is invested in their well-being. This can lead to a more positive work environment and increased employee engagement, resulting in better sales performance.
- Targeted Interventions: By understanding the reasons why reps are likely to leave, the company can develop targeted interventions to address those specific issues. This could involve improving training programs, offering more competitive compensation packages, or enhancing the overall work culture.

Benefits for HR:

- Proactive Talent Management: PTL data allows HR to develop proactive talent management strategies. They can identify high performers and invest in their development or create programs to address common reasons for dissatisfaction before they lead to resignations.
- Data-Driven Decision Making: PTL data provides valuable insights into employee sentiment and challenges within the call center. This data can be used to inform HR decisions about compensation, benefits, and overall employee relations strategies.
- Improved Employer Branding: A company that demonstrates it cares about employee well-being and retention is more likely to attract and retain top talent.

Collaboration is Key:

The success of a PTL process hinges on collaboration between sales leadership and HR. Sales managers can provide insights into rep performance, identify early warning signs of dissatisfaction, and work with HR to develop targeted interventions. HR can leverage PTL data to inform broader talent management strategies and develop programs to improve employee engagement and retention.

Here are some ways to detect a propensity to leave (PTL):

Sales supervisor observations:

Changes in Communication:

- Reduced Participation: Notice if a rep becomes less vocal in meetings, avoids offering ideas, or seems withdrawn during team discussions.
- Increased Negativity: Be aware of a shift towards negativity, complaining about customers, colleagues, or company policies more frequently.
- Difficulty Communicating Concerns: Observe if a rep hesitates to raise concerns or avoids open communication with the supervisor about challenges they face.

Changes in Work Habits:

- Increased Errors: Monitor for a rise in call handling errors, data entry mistakes, or missed deadlines.
- Lack of Initiative: Observe if a rep becomes less proactive, requiring constant reminders to complete tasks or lacking initiative to take on new challenges.
- Loss of Focus: Notice if a rep seems distracted, has difficulty concentrating on calls, or takes longer breaks more frequently.

Changes in Emotional State:

- Decreased Morale: Observe a general lack of enthusiasm, lower energy levels, or a negative attitude that impacts their overall demeanor.
- Increased Stress: Be aware of signs of stress, such as physical tension, irritability, or difficulty sleeping, which could be related to work issues.
- Loss of Motivation: Observe if a rep seems less motivated to achieve their goals, misses quotas consistently, or puts in minimal effort during calls.

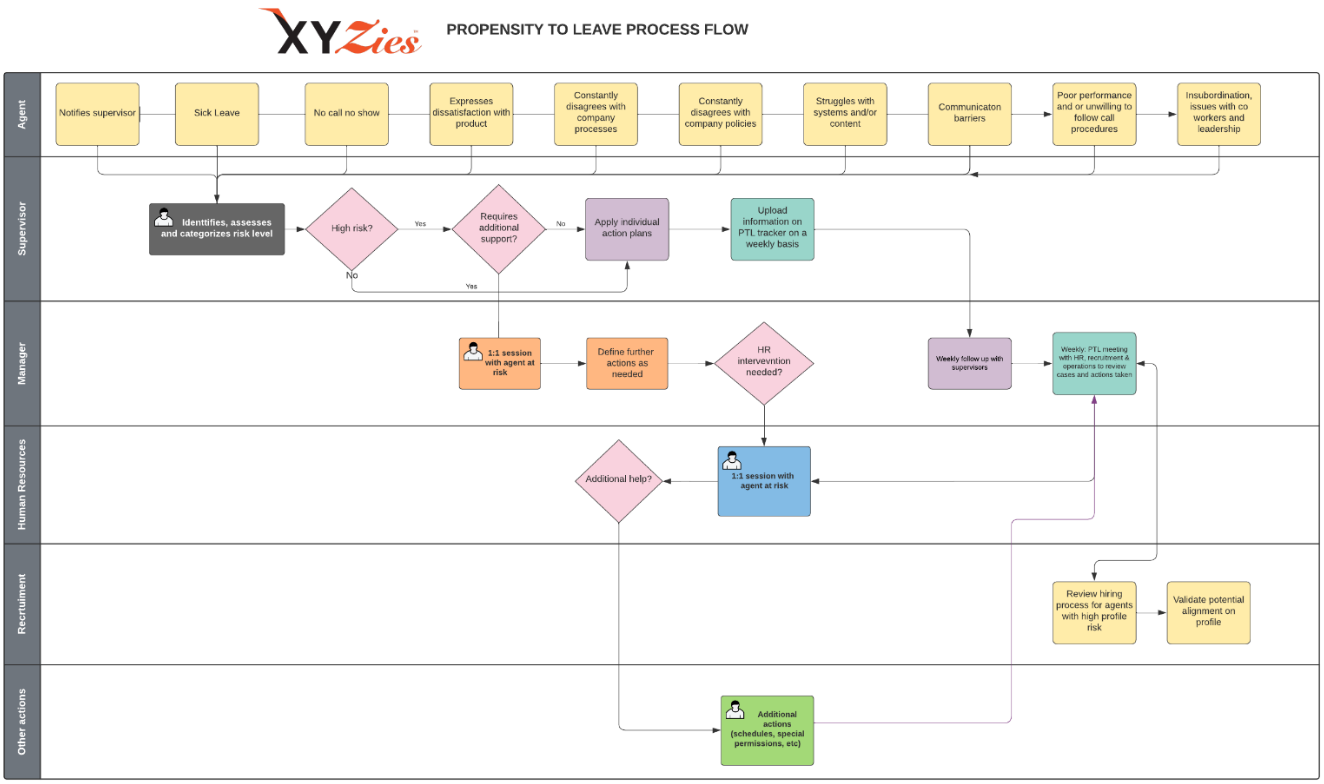
Changes in Social Interaction

- Isolation from Team: Notice if a rep withdraws from social interactions with colleagues, avoids team lunches, or seems less interested in team activities.
- Changes in Work Relationships: Observe if a rep experiences increased conflict with colleagues, avoids interaction with specific team members, or seems unhappy with the team dynamic.
- Increased Interest in External Opportunities: Notice if a rep openly discusses job searches, attends industry events outside of work, or seems focused on career paths outside the company.

By being observant of these changes, a sales supervisor can initiate more targeted conversations to understand the root cause of PTL. Some actions to take could be:

- Schedule one-on-one meetings: Set up regular or informal one-on-one meetings to create a safe space for open communication.
- Focus on active listening: Pay close attention to the rep's concerns and avoid interrupting. Ask open-ended questions to encourage them to elaborate.
- Offer support and resources: Let the rep know you are there to help and explore solutions together. Explore training opportunities, flexible scheduling options, or workload adjustments that might address their concerns.
- Address workload concerns: If workload is a contributing factor, discuss task delegation, prioritizing tasks, or exploring time management strategies to improve efficiency.
- Recognize achievements: Even during challenging times, make sure to recognize and appreciate the rep's accomplishments.
- Raise your hand! You may need additional support from either WFM, your manager and even HR team. Keep in mind, not all actions can be addressed by the supervisor.
- Ask for feedback! Sometimes the team can give you interesting feedback to help us improve their experience.
- Be consistent in developing your team and prepare them for all the scenarios they may encounter in their interactions.

By being initiative-taking and observant, sales supervisors can identify PTL early on and take steps to address employee concerns. This can contribute to a more positive work environment, improved employee retention, and a more successful sales team.



Expectations and deliverables

Here's the list of deliverables and expectations on duty as a sup.

Task	Description	Instructions	Source	Date/Day of delivery	Cadence
Performance management	Prepare follow up of bottom performers of team with action plans and additional actions taken	Use the tracker to conduct weekly performance follow up including, RCA, focus agents, action plan, and weekly KPI follow up based on targets	Tracker performance 2024.xlsx (sharepoint.com)	Monday EOD	Weekly
PTL updates	Update PTL tracker to report cases of propensity to leave based on observations, performance or any additional comments done by agents	Use tracker of Attrition PTL to update information on a weekly basis with action plans. Attend weekly session with HR to discuss critical cases and additional help needed	https://thepreferredprepaid.sharepoint.com/sites/SalesColombiateam/Lists/PTL%20%20Attrition%20tracker/AllItems.aspx	Monday EOD	Weekly
1:1 with agents	Weekly 1 on 1 sessions of coaching	15-minute sessions with agents to be conducted on a weekly focused on performance and action plans. The sessions should be documented in intranet	Target: 90% compliance of coaching		Weekly
Motivation	Engagement and motivation plan weekly	Include the engagement and motivational activities of the week to enhance relationship with team. Use comments as part of action plan for the month	Tracker performance 2024.xlsx (sharepoint.com)	Friday 5 pm	Weekly
Calibration	Attend and send out calibration based on QA form and calls assigned by the team	TBD	TBD	TBD	Biweekly
Non converted calls audit	2 non converted calls from day before from bottom performers	Use QA form to validate issues with non-converted calls between 4 and 12 minutes. Use calls from outliers from day before	Short calls review (sharepoint.com)	Based on shift scheduled EOD	Daily

Absenteeism report	Absenteeism information provided	Email to WFM with absences of the day	Email: WFM, Management, HR	12 pm	Daily
Contest and power hours	Daily updates	Real time follow up on results of weekly, daily, and monthly contests	Email/Chat	As needed	Daily
Disciplinary request	Requests to HR team as needed based on performance, Red flags, and/or any other callout	Fill form created with HR team if needed to request disciplinary process, hearings and any other impacting behavior that requires HR presence. In case the process requires only written, verbal warnings, supervisor can do the process directly on intranet.	Solicitud proceso disciplinario (office.com)		As needed
PIP	PIP part of performance management	Request and follow up of PIP process, based on performance management. PIP process needs to include HR team with a strict follow up on committed actions as well as performance review. Create PIP request using the templated located in HR process in SharePoint and attach to disciplinary request forms.	Solicitud proceso disciplinario (office.com)		As needed
Phone time	2 hours	Phone time conducted on a weekly basis based on LOB assigned. Phone time can also be requested to cover absenteeism and due to issues with volume	NA	Weekly	Weekly
Up trainings and meetings	As required	The supervisor is accountable for completing any assigned training session in LMS based on the due date.	As required	As required	As required
Calibration sessions	Complete calibration form and attend calibration session	The supervisor is required to complete the calibration form before the due time as required by the QA team and needs to be present at the calibration session. Due to planning, the supervisor will need to arrange floor support if needed and reply in the outlook invitation in case any novelty occurs.	Form, email completed.	Weekly	As required
Team huddles	Conduct an accelerated huddle	The supervisor will conduct a weekly accelerated huddle to have a sessions of best practice sharing, understand challenges and training needs in the team	WFM email to request the time. Agenda ready for meeting and ECC documentation	Weekly	Per availability
Schedule follow up	Prepare and follow up novelties in schedules for agents to follow				