Send Coaching Feedback Workflow | v1

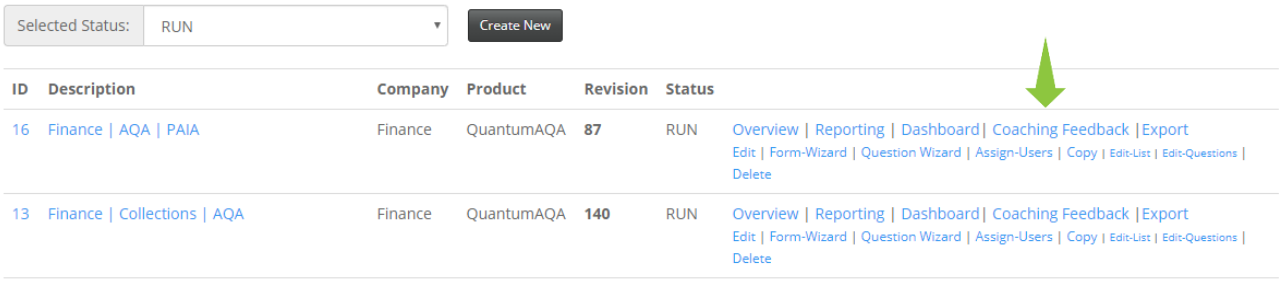
Using the new feedback functionality

1. This is only for Agent Feedback and should ideally not be used for any other type of feedback.
2. Feedback is distributed per assessment.
3. Only one agent feedback per link will be allowed.
4. Only interactions with feedback will allow for a mail to be submitted.

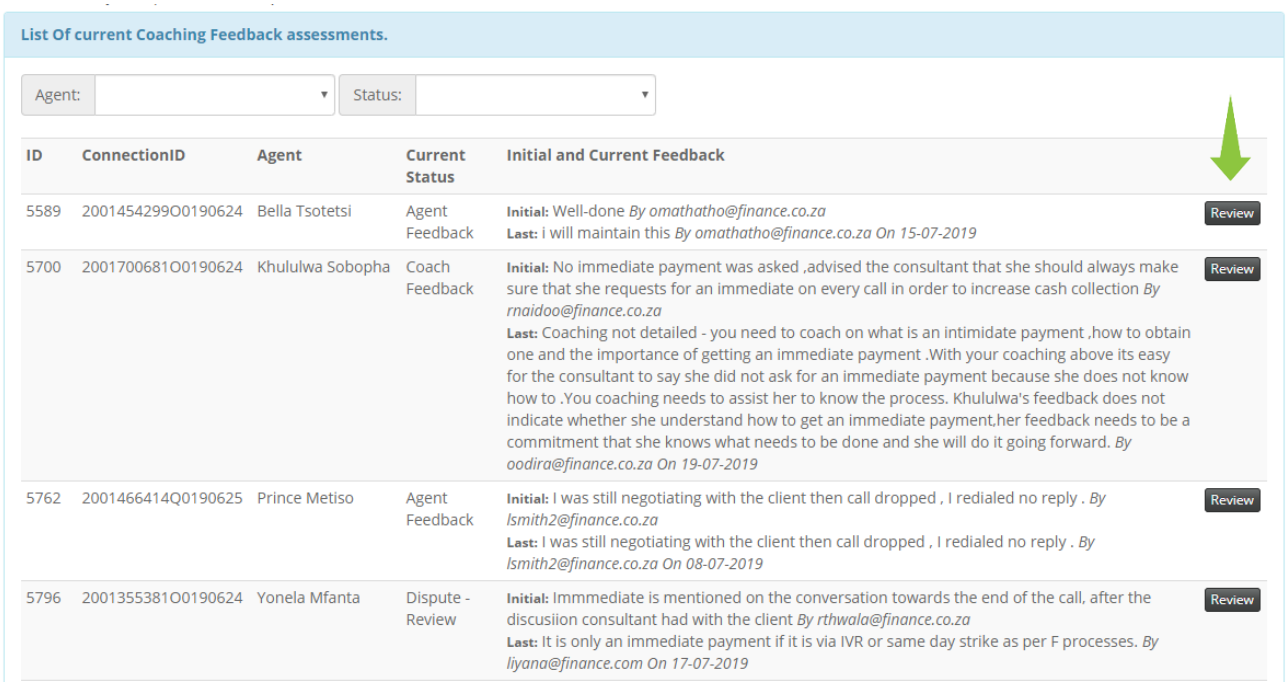
You can access the feedback function from the following app options:

- Campaign Management

  On the Campaign Management via the *Coaching Feedback* link.



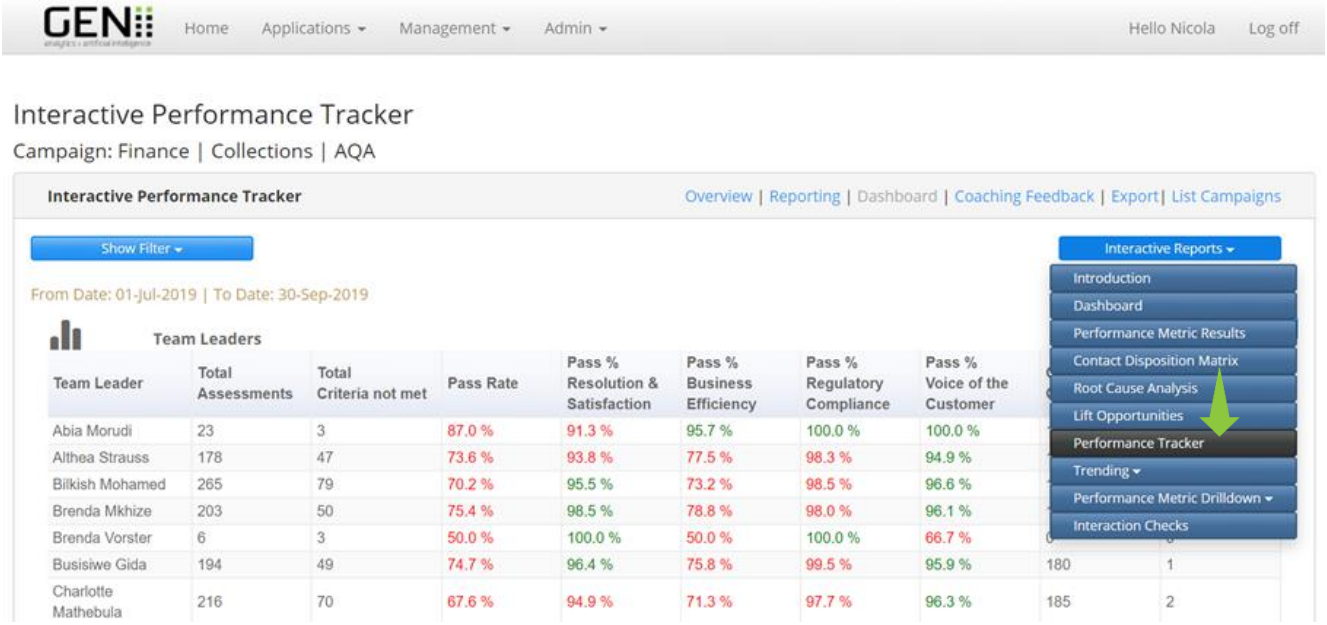
  Here you can select *Review* of the assessment you require to send for feedback



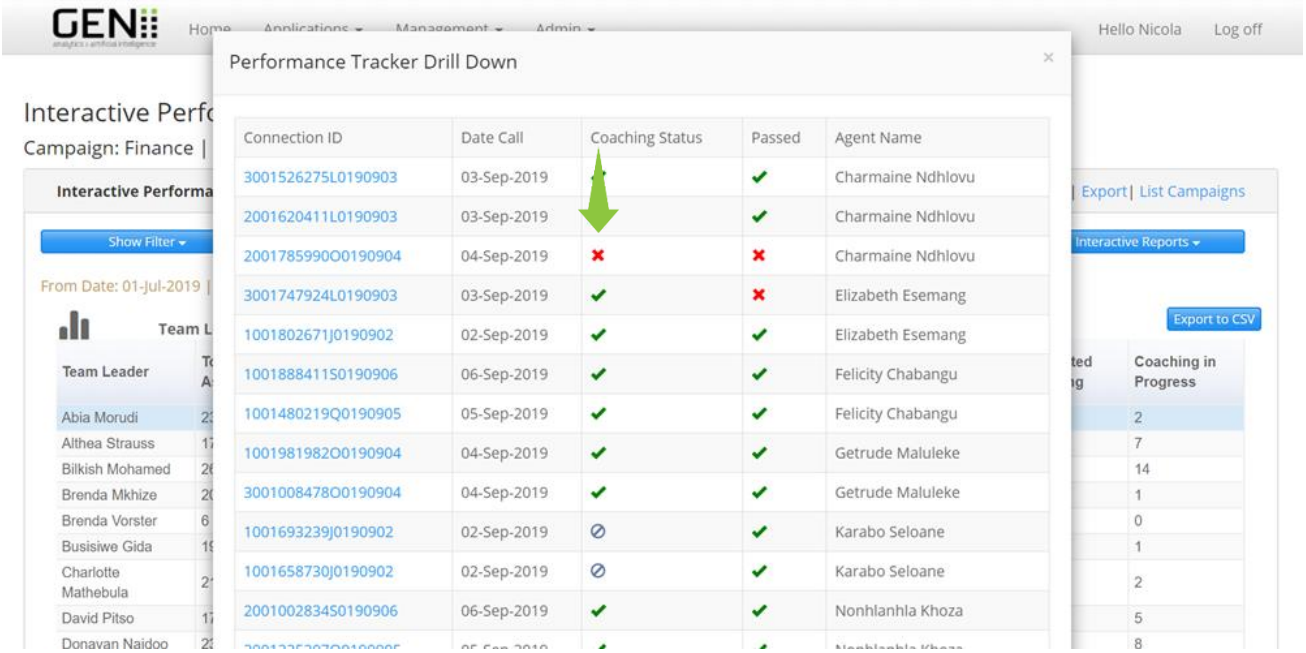
Now follow **Step 1 – 5** on Page 6…

- Performance Tracker

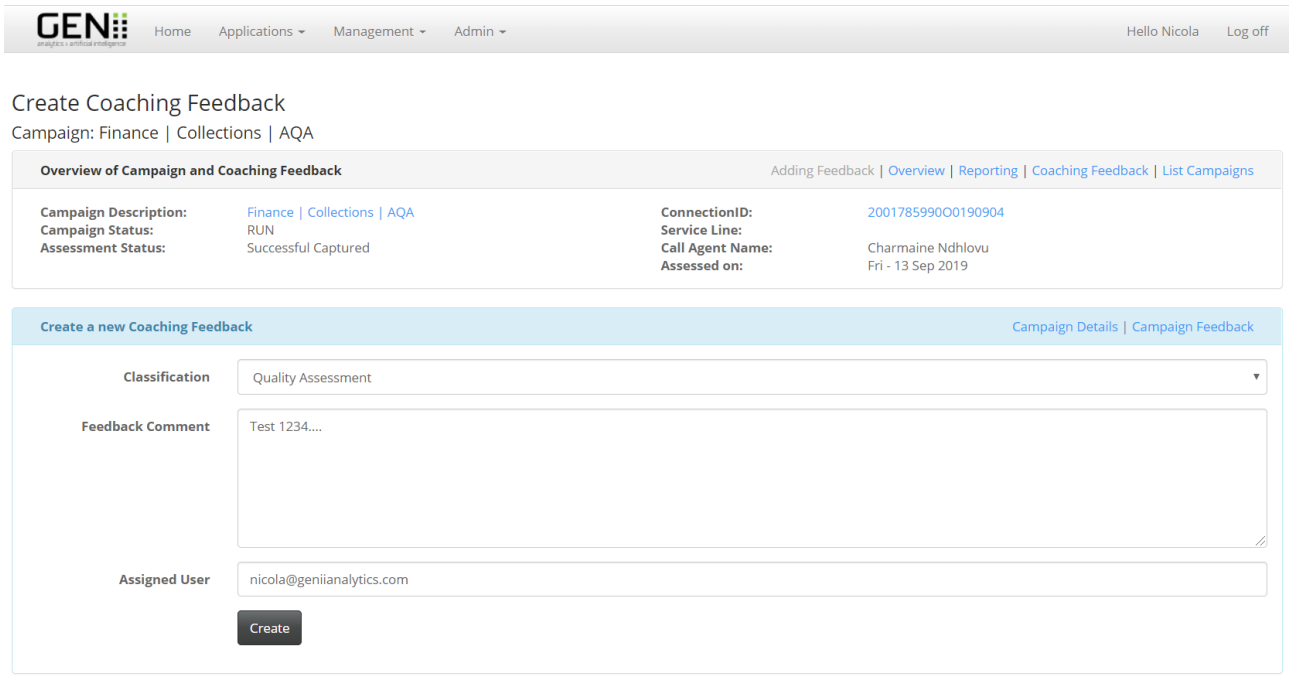
Access the Performance Tracker via the *Interactive Dashboard*



Here you can select your team or an agent and select an interaction for coaching



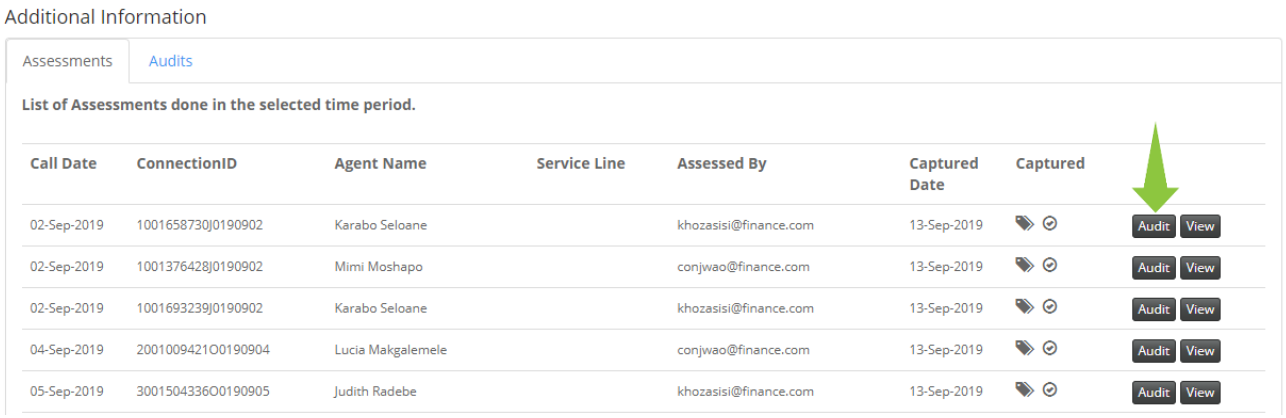
Add the feedback for the interaction if there is none, it will need to be updated before an email can be sent



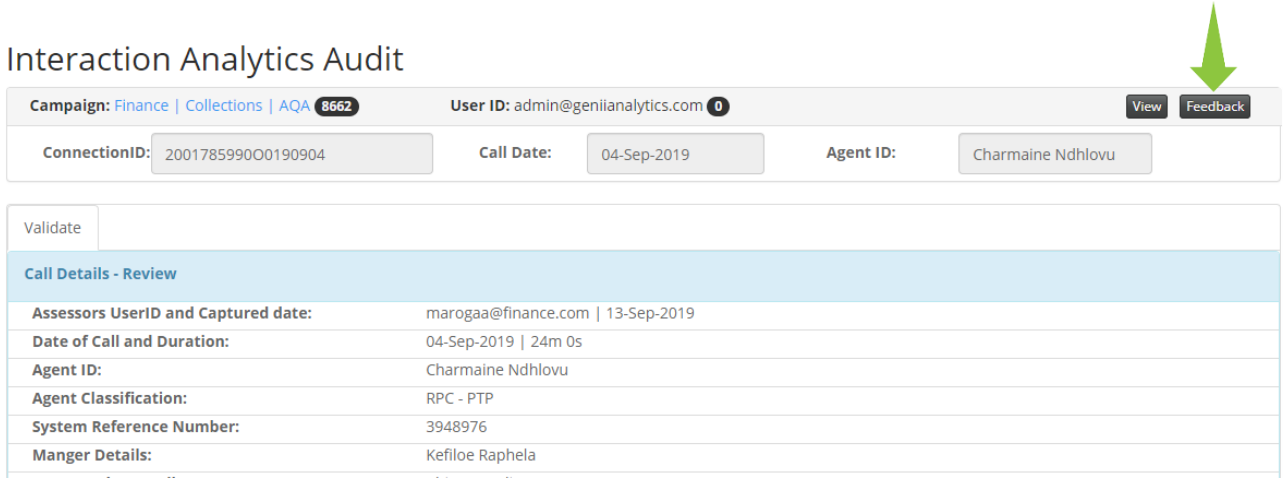
Now follow **Step 1 – 5** on Page 6...

- <u>Overview</u>

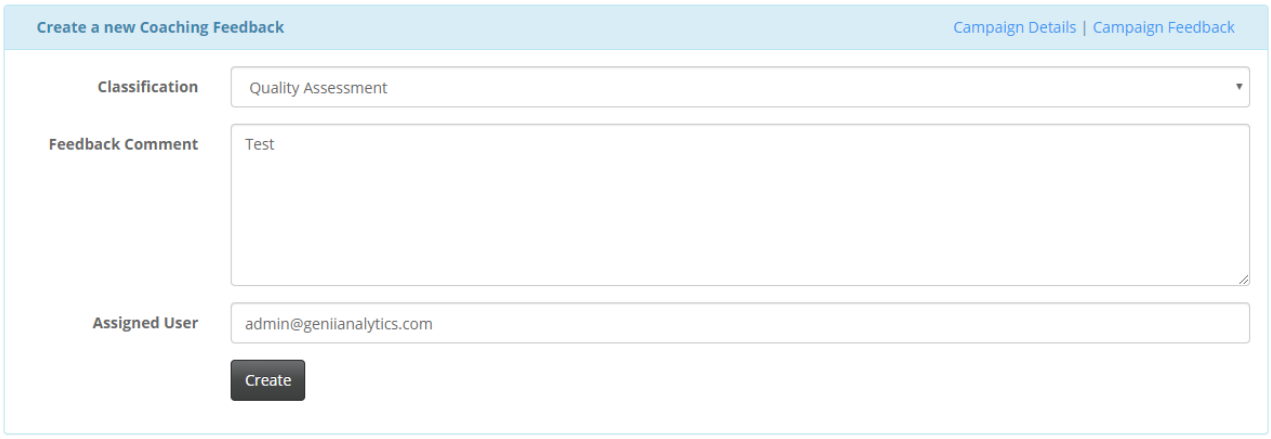
Select *Audit* of the applicable interaction



Select *Feedback*



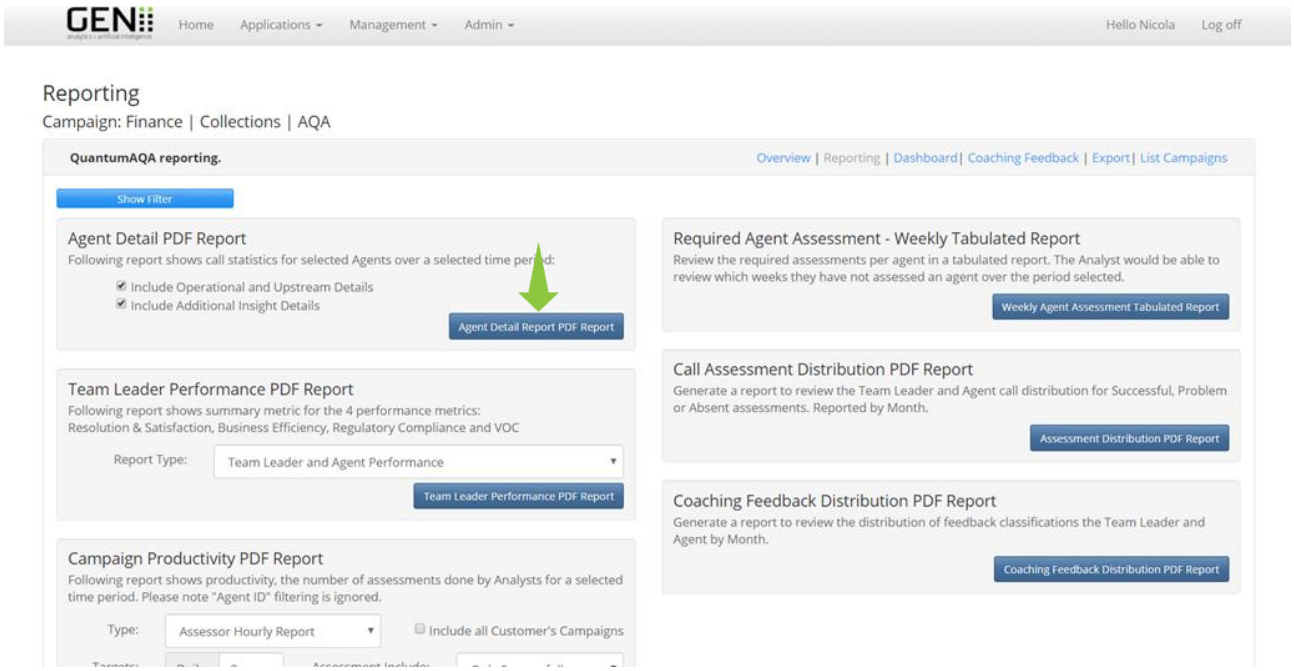
If there is no feedback assigned, it will need to be updated before an email is sent



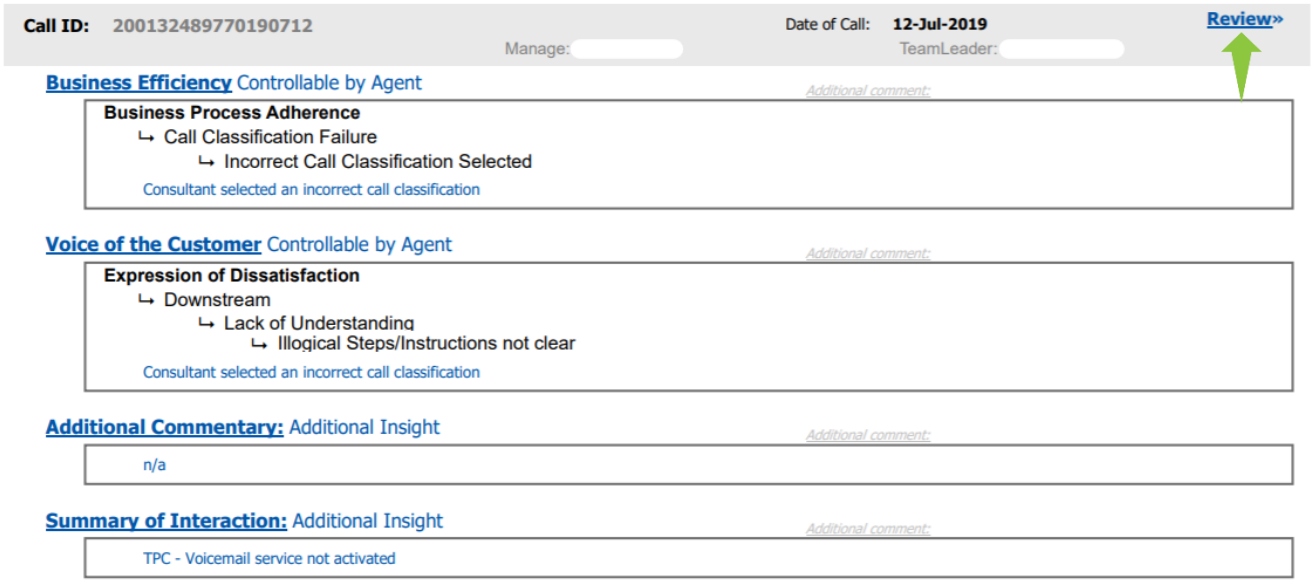
Now follow **Step 1 – 5** on Page 6…

- Agent Detailed PDF Report

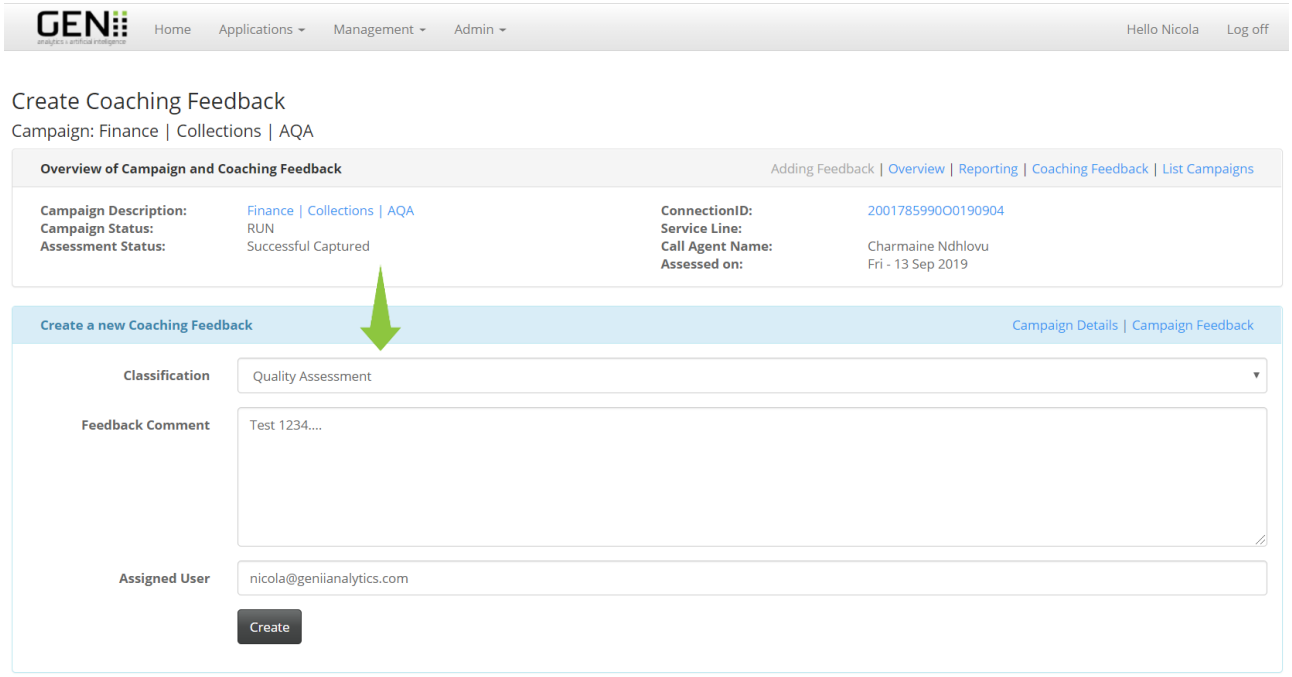
Access the Agent Detail PDF Report via the *Reporting* option of the relevant campaign (filter either by your team or for an agent and for the selected period)



In the coaching PDF select *Review* on the interaction you would like to provide coaching feedback on

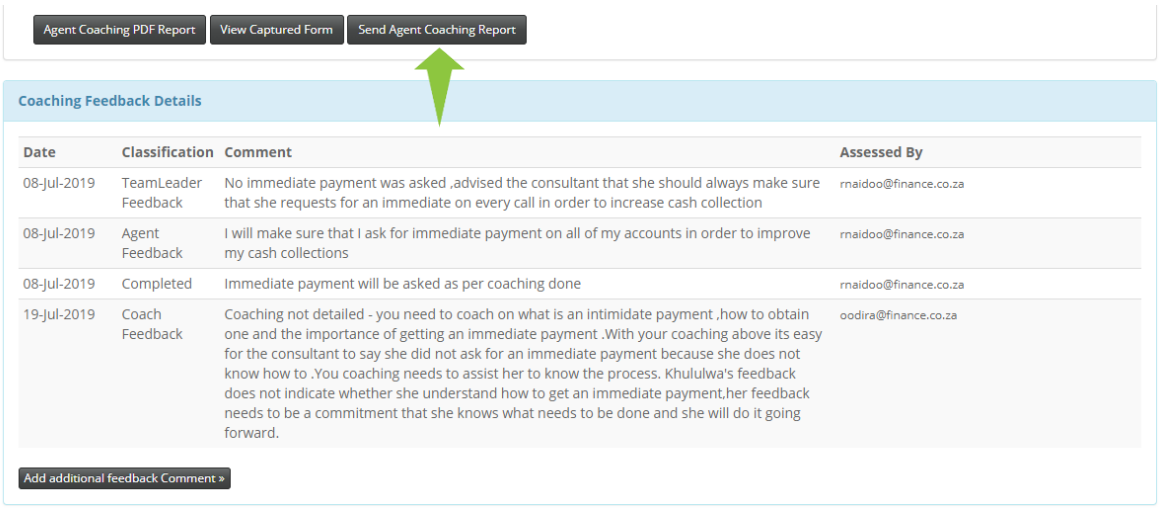


Add the feedback for the interaction if there is none, it will need to be updated before an email can be sent

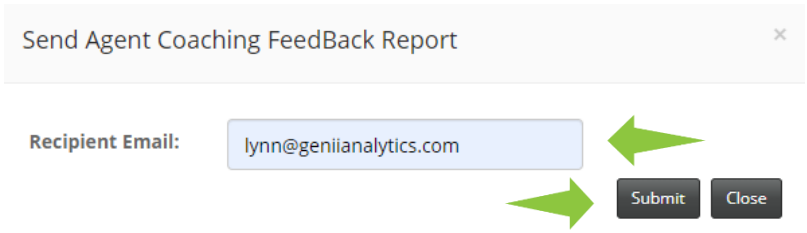


Now follow **Step 1 – 5** on Page 6...

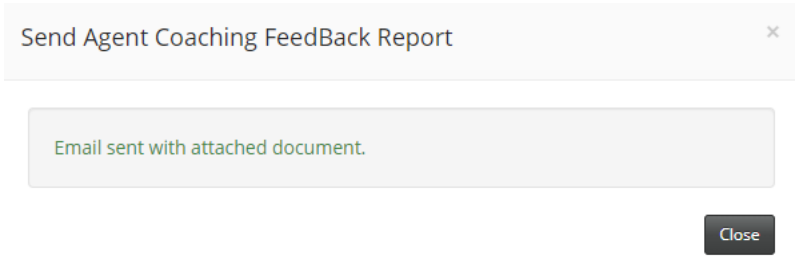
Step 1: You will then select *Send Agent Coaching Report* and a window will pop-up



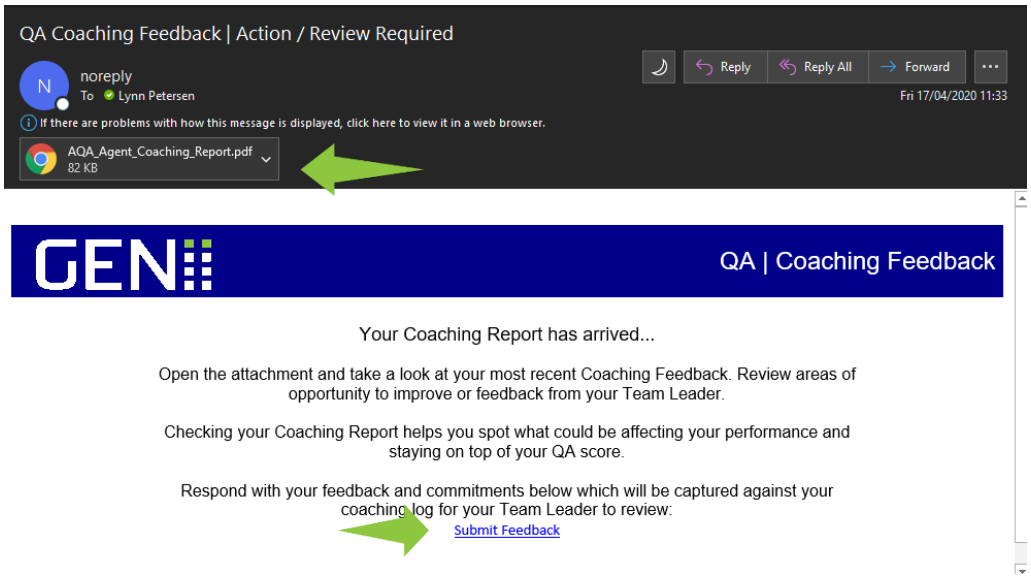
Step 2: Enter the agent's email address to the *Recipient Email* box and select *Submit*



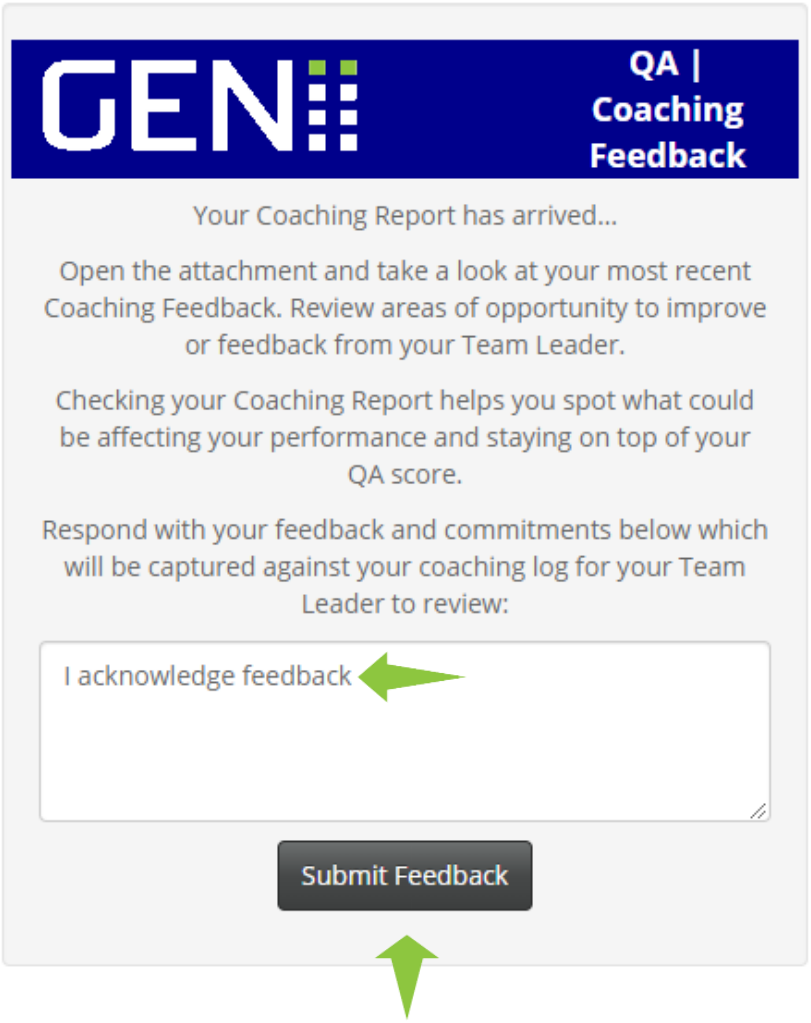
You will receive the following acknowledgement notification.



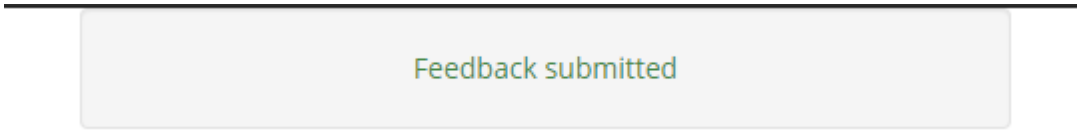
Step 3: The agent will receive the following email which will include a pdf report and a link to submit feedback



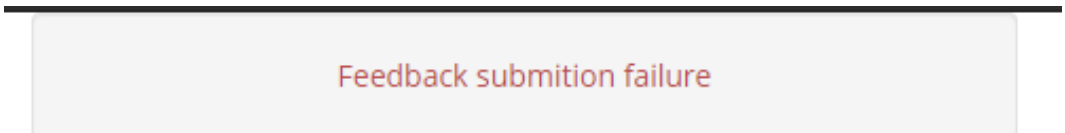
Step 4: Once they have selected the link they will be redirected to a secure website where they can submit their comments by adding their notes and selecting *Submit Feedback*



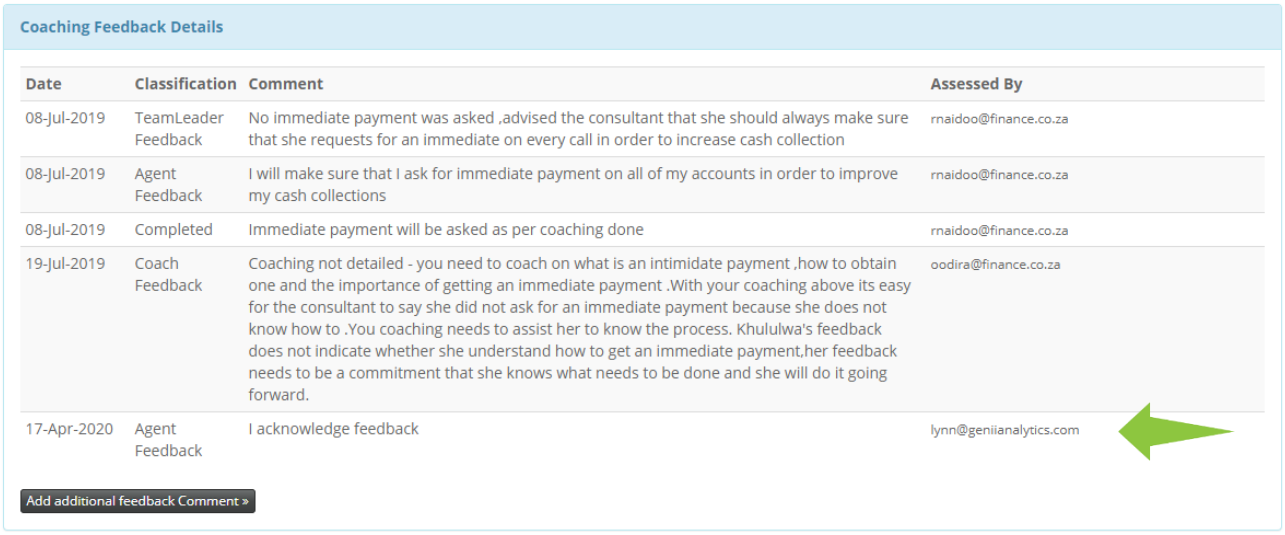
They will get the following acknowledgement notification.



This link will only allow for one submission and if it is accessed again the following notification will come up.



Step 5: Once feedback is submitted the app will update accordingly.



Coaching Feedback Details

Date	Classification	Comment	Assessed By
08-Jul-2019	TeamLeader Feedback	No immediate payment was asked ,advised the consultant that she should always make sure that she requests for an immediate on every call in order to increase cash collection	rnaidoo@finance.co.za
08-Jul-2019	Agent Feedback	I will make sure that I ask for immediate payment on all of my accounts in order to improve my cash collections	rnaidoo@finance.co.za
08-Jul-2019	Completed	Immediate payment will be asked as per coaching done	rnaidoo@finance.co.za
19-Jul-2019	Coach Feedback	Coaching not detailed - you need to coach on what is an intimidate payment ,how to obtain one and the importance of getting an immediate payment .With your coaching above its easy for the consultant to say she did not ask for an immediate payment because she does not know how to .You coaching needs to assist her to know the process. Khululwa's feedback does not indicate whether she understand how to get an immediate payment,her feedback needs to be a commitment that she knows what needs to be done and she will do it going forward.	oodira@finance.co.za
17-Apr-2020	Agent Feedback	I acknowledge feedback	lynn@geniianalytics.com

Add additional feedback Comment »