The Coaching tool uses a selectable coaching form that will be created on the Templates page.

**Templates Page:**

Create a dynamic form builder that will allow users to create a form that follows a specific coaching need. Once the form is created from the templates page and set to active wit will appear as a selectable form in a drop-down list when starting a new Coaching session.

These are the types of forms that can be created:

* **Coaching Form:** When a new Coaching session is started only these can be selected from the list.
* **Follow-up Form:** These forms can only be used after the initial coaching session has been submitted. These are generally shorter forms that are used for quick coaching follow up actions.
* **Team Form:** These are only used when a team huddle is being conducted. These should never show up as an option in a coaching session this is designed for a group setting, not one-on-one coaching.

**Coaching Form Page:**

When coaching is started (Follow-up or New) users will be directed to the Coaching page to initiate the coaching session. If the coaching session is a follow up session the page will display the previous coaching session information. The coach will select continue coaching and be prompted to select a coaching form. They can select a Coaching for or a Follow-up form and start the coaching session.

Every form will include the following details by default:

* User & Coach Information: Display who is being coached and coached by
* Coaching Date: The date the coaching session started
* Coaching Behavior: Behaviors will be tied to a KPI on the Templates Page
* Follow-up Actions: Coach must have at least one but multiple can be added)
* Follow-up date: Required unless coach ends the Coaching session)
* Coaching History: Display all the coaching sessions from the time this session started until the coach ends the session.

Coaching Flow:

If a coaching session is started from coaching opportunities, the agent information will automatically be populated into the form. If this is a new session started by clicking the “Start Coaching Session” in the left menu the coach will need to search for the agent by Name and ID.

The current day will be recorded along with the Coach who started the session.

Suggested Coaching:

Once the Details are populated, the system will gather the agent’s information and display top coaching behavior opportunities based on KPI average.

Example: if CSAT, NPS and FCR are low, what are the top behaviors that need to be addressed?

Step 1: Select an available coaching form from a dropdown list. The list will populate from templates page.

Step 2: Select a Behavior to coach based on suggested coaching. Pre-populate the behavior with the largest impact.

Step 3: work through the form and fill in the required sections.

Action Items: The coach and the agent will both make a commitment to completing the added action items. These must be completed before the Submit & Schedule follow-up button is activated.

Step 4: Coach Commitment- Add at least 1 action item and select a day on or before the follow up date.

Step 5: Agent Commitment – Add at least 1 action item and select a day on or before the follow up date.

Step 6: Save as Draft if agent is not present or Submit & Schedule Follow-up if form is completed.

Step 7: Launch a pop-up calendar modal to schedule follow-up or click End Coaching if this this does not require a follow up session. Note: at least one follow-up session is required before End coaching is available.