

CALL CENTER COACHING FORM

Agent Name: _____ Call ID: _____

Coach Name: _____ Session Type: _____

CALL DETAILS

Call Duration (mm:ss): _____

Call Outcome: _____

PERFORMANCE METRICS

Greeting and Introduction	_____
Verification of Caller Identity	_____
Product/Service Knowledge	_____
Adherence to Call Script	_____
Listening Skills	_____
Problem Solving and Resolution	_____
Call Control and Compliance	_____
Closure and Next Steps	_____
Overall Customer Satisfaction	_____

COACHING SUMMARY

Provide detailed feedback on the agent's performance during the call, highlight strengths, identify areas for improvement, and recommend actionable steps to enhance overall effectiveness and customer satisfaction.

ACTION PLAN

Outline specific goals, training, or follow-up activities the agent must complete to address coaching points. Include timelines and responsible parties if applicable.

AGENT'S SIGNATURE

COACH'S SIGNATURE

Signature: _____

Signature: _____

LEGAL NOTICE

This Coaching Form is a confidential document intended solely for the use of the Call Center and its employees. It is maintained in compliance with applicable United States laws governing employee coaching and performance records. By signing below, the parties acknowledge the accuracy of the information contained herein and their understanding that this document may be used for performance evaluation, training purposes, and, if necessary, for disciplinary action in accordance with company policies and legal requirements.

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