Recording, Quality Management and Speech Analytics User Manual

Coaching

3/28/2025

Coaching

Important

This feature is not available in the Recording UI mode.

The coaching system is designed to help managers, supervisors, quality-monitoring personnel, and agents with training processes. In the system, coaching sessions are created for trainees to take part in. The sessions consist of lists of interactions that the trainee is asked to listen to, either in part or in their entirety. In addition, they may include notes, Action Items, and links to other sites. While anyone with the required permissions can open a new coaching session, it is the session's coach who designs the session by defining the Interaction Lists, Action Items, and links, and by adding notes to guide the trainee through the session.

Both novice and experienced personnel can benefit from taking part in a training session; new employees can be introduced to their jobs through a coaching session, and veterans can be encouraged to fine-tune their techniques by means of coaching sessions that highlight specific aspects of their jobs.

Using Coaching Sessions

Coaching Sessions

Working with Coaching Sessions

Working with the Coaching Session List

The coaching **Sessions** screen lets you see which coaching sessions exist, gives general information about each session, and enables you to access the **Session Details** screen in which you can manage or take part in individual sessions. To open the **Sessions** screen:

- In the Main Menu, under **Coaching**, select **Sessions**.

As shown in the following image, the left side of the **Sessions** screen contains the session list, a table that lists the existing sessions. Below the session list is a calendar that shows when the sessions are scheduled. The right side of the screen displays details about the session that is selected in the table.

1000px

Columns in the Sessions

The session list contains the following columns:

Column	Description
Status	The status of the session. (See below for a list of possible statuses.)
Schedule Date	The beginning of the time range when the trainee is meant to take part in the session
Name	The name of the session
Coach	The username of the coach
Trainee	The username of the trainee
Actions	Click one of the buttons to select an action. (See below for a list of actions.)

Session Statuses

Session statuses are indicated by icons in the Session List and by color-coding in the calendar. The following session statuses are defined:

Status	Description
Scheduled	The session has been created, but was not yet started.
In Progress	The trainee is currently taking part in the session.
On Hold	The session was paused after the trainee began taking part in it.
Completed	The trainee has finished taking part in the session.

Action Options

The Actions column contains buttons that you can use to perform an action related to a session in the list:

Button	Description
file:Smicon_sessionactioncalendar.png	Adds the session to the Outlook calendar on your local computer
file:Smicon_sessionactionemail.png	Resends the e-mail notification about the session to the coach and the trainee
file:Smicon_sessionactionpermalink.png	Creates a Permalink to the session.

Button	Description
file:Smicon_sessionactionopen.png	Opens the **Session Details** screen in Setup mode so that you can add content to the session or modify the session properties or content **Note:** Only available to the creator and coach; the trainee cannot open the **Session Details** in Setup mode
file:Smicon_sessionactionreport.png	Generates a report containing statistical information about all of the sessions assigned to the trainee of the selected session
file:Smicon_delete.png	Deletes the specific session.

Filtering the List

You can use filters to limit the sessions that are displayed in the list to those that meet criteria you specify. Two types of filters are available:

- **General filters**, which allow you to filter the list based on user and date, and let you choose whether to include completed sessions in the list.
- **Column-based filters**, which allow you to filter the list based on session status and trainee.

General Filters

The general filter controls are located at the top of the session list. The following filters are available:

Filter Type	Description
User	Select **All Sessions** to display all sessions that you have permissions to see. Select **My Sessions** to include only view sessions in which you are either the creator, the coach or the trainee.
Date Range	Under **From**, select the beginning of the period to include in the list. Under **To**, select the end of the period to include in the list.
Completed	Select the **Completed** checkbox to include sessions that were completed in the list. Clear the checkbox to only include sessions that were not yet completed.

Column-Based Filters

Column-based filters are located in the column headings of the **Status** and **Trainee** columns.

To use the Status filter:

- In the heading of the **Status** column, in the drop-down list, select the status you want to include in the session list. Only sessions with the selected status are displayed in the list. To view sessions with any status, select **All**.

To activate the Trainee filter:

- In the text box to the right of the **Trainee** heading, type part of the name or username of the trainee you want to include in the list. As you type, names and user names containing those letters are displayed in a drop-down list. Select the trainee from the list. Only sessions with the selected trainee are displayed in the list.

To deactivate the Trainee filter:

- Delete the text in the text field and then press **Enter**. Sessions for all trainees are displayed in the list.

Sorting the Columns

You can choose to sort the session list by any column. To sort the session list by a column:

- Click the title of the column.

> **Important**
> Click the title a second time to reverse the sort order.

Working with the Calendar

The lower left area of the Coaching > Session screen contains a calendar in which you can see when the sessions that appear in the list are scheduled to take place. You can choose a monthly, weekly, or daily display. You can also open the **Session Details** screen for a session directly from the calendar.

500px
To select the type of calendar display:

- In the upper-right of the calendar area, click **month**, **week**, or **day**. The calendar display changes to the selected type.

To choose the time period to display:

- In the upper-left of the calendar area, click file:Smicon_displayprevious.png to display the previous time period (for example, if you are displaying a weekly calendar, the previous week), or file:smicon_expandtable.png to display the next time period.

To open the **Session Details** screen for a session that appears in the calendar:

- Click the session in the calendar.

Viewing Session Details

To view session details in the **Sessions** screen, click the specific session row. The session details are displayed on the right side of the screen.
See Working with the Coaching Session List
The display includes five boxes:

Box	Description
General Details	The status and properties of the session. If the trainee has already begun to take part in the session, the start time, end time, and duration of their participation appears. Otherwise, only the Due Dates appear.
Notes	Lists all public notes that are attached to the session, and all private notes that you attached to the session.
Interaction Lists	Lists all interaction lists that are attached to the session. For each interaction list, indicates how many interaction s have comments, and how many interaction s are in the list. For example, (1,3) indicates that one interaction in the list has comments, and the list contains three interaction s. If an interaction has comments, the comments appear below the interaction list.
Action Items	An Action Items box in which all Action Items associated with the session appear.
Links	Lists all links that are included in the session, and indicates whether the trainee has opened them yet.

Edit Session Details

The **Session Details** page is used to manage an individual session. In the Session Details page you can add a new session, create reports, listen to interactions, and so on.

> **Important**
> The creator or coach can also open the **Session Details** screen in

> Setup mode.

To edit a session:

1. In the Main Menu, under **Coaching**, select **Sessions**.

   The **Sessions** screen opens.

2. In the session list, under **Actions**, click the **Set up Coaching Session** icon (file:smicon_sessionactionopen.png) associated with the session you want to edit.
3. Manage the specific session, properties, notes, links and so on. For additional information, refer to Create and Manage Coaching Sessions

Deleting Sessions

You can delete one or more coaching sessions. To delete coaching sessions:

1. Select the check box to the left of each session you want to delete.
2. At the top of the screen, click **Delete Session** 15px. You are prompted to confirm that you want to delete the sessions.
3. Click **OK**. The sessions are deleted, and a confirmation message appears.

Session Details

Taking Part in a Session

Trainees take part in a coaching session by opening the session in the **Session Details** screen. In this screen, they can listen to the interactions, read the notes, open the links, and manage the Action Items attached to the session.

Opening a Session

When you are ready to take part in a session, open it in the **Session Details** screen. To open a session in the **Session Details** screen, do one of the following:

- In the **Views** page, in the **My Messages** widget, click the subject of the message inviting you to the session.

- In the **Sessions** screen, in the session list, click the name of the session.

Overview of the Session Details Screen

When you first open it, the **Session Details** screen contains the following elements:

Element	Description
Session controls	Bar across the top of the screen that contains a link to the **Sessions** screen, session status information, and session controls
General Details	Interaction lists and links attached to the session
General	Session properties
Interaction lists	Summary information about each interaction list attached to the session. Each interaction list, indicates how many interaction s have comments, and how many interaction s are in the list. For example, (1,3) indicates that one interaction in the list has comments, and the list contains three interaction s. If an interaction has comments, the comments appear below the summary information.
Action Items	Action Items box listing all Action Items linked to the session. For information about using the **Action Items** box, see Managing Action Items.
Links	Summary information about the links that are attached to the session.
Notes	Lists all public notes that are attached to the session, and all private notes that you attached to the session.

Progressing Through the Session

Once the session is open, click **Start Session** to begin taking part in it. The start time of the session is recorded, and the status is changed to `In Progress`. During the session, click **Pause Session** to temporarily stop taking part. Click **End Session** when you have completed the session.

> **Important**

> The coach can also pause the session or mark it as completed.

During the session, use the session notes to guide you through the session. Listen to the interaction s in the interaction lists and pay special attention to those parts that are mentioned in the notes.

Listening to Interactions

The interaction lists attached to the session can be opened in an Interaction Grid, and the interaction s can be played back in a Media Player, in the **Session Details** screen. To view an interaction list:

- On the left side of the screen, under **General Details**, click the name of the interaction list. An Interaction Grid opens on the right side of the screen, in place of the **General**, **Interaction Lists**, and Notes boxes, and lists all of the interaction s in the list. For detailed information about Interaction Grids, see Using the Interaction Grid.

To play back an interaction :

- In the Interaction Grid, click the **Play** button in the interaction's row. The Media Player opens below the grid and begins to play the interaction. For detailed information about the Media Player, see Using the Media Player.

Create and Manage Coaching Sessions

Create and Manage a New Coaching Session

This section explains how to open a new coaching session, set it up by adding interaction lists, notes, Action Items, and links to the session, and manage its contents once it is set up.

New coaching sessions can be opened in a number of ways:

- In the **Coaching** page
- In the **Views** page, in the My Messages widget
- In an Interaction Grid or an Event Grid, from the **More** menu

This section explains how to open a new session in the **Coaching** page. For information about opening a coaching session in one of the other ways, please refer to the relevant sections of this manual. Regardless of how you open the coaching session, you will most likely want to add interaction lists, notes, and other items to the session, as explained in this section.

Opening a New Session

When you open a new coaching session, you specify the name of the session, the coach, the trainee, and the date and time when the trainee should take part in the session. If you wish, you can also add either a public or private note. The session then appears in the list of sessions, but it does not have any content. To open a new coaching session:

1. In the Main Menu, in the **Coaching** drop-down menu, select **Sessions**. The **Sessions** screen opens.
2. At the top of the **Sessions List**, click **New Session**. The **New coaching session** dialog box opens.

   500px

3. Fill in the fields as follows:

Field	Description
Session Name	Type a name for the session.
Schedule Date	Click the calendar icon (file:sm_calendar.png) to select the date and time period during which you want the trainee to take part in the session.
Coach	Select the coach in one of the following ways: • In the text field, type part of the name or username of the coach. As you type, names and user names containing those letters are displayed in a dropdown list. Select the coach from the list. • Click the ... button (25px) beside the text field. In the dialog box, select the user from the list of users in the relevant workgroup.
Trainee	Select the trainee in one of the following ways: • In the text field, type part of the name or username of the trainee. As you type, names and user names containing those letters are displayed in a dropdown list. Select the trainee from the list. • Click the ... button (25px) beside the text field. In the dialog box, select the user from the list of users in the relevant workgroup.
Type	Select the type of coaching session from the list.
Public/Private	If you are adding any notes in the **Notes** field, select **Public** if you want the notes to be visible to anyone who can access the session or **Private** if you only want the notes to be visible to you.

Field	Description
Notes	Type any notes you want to attach to the session. Public notes can be used to help the trainee and/or the coach with the session.

4. Click **Save**. The coaching session is opened; it appears in the Sessions List and in the schedule below it. It is selected in the **Sessions List** and its details are displayed in the **Sessions** screen, to the right of the **Sessions List**. An invitation message is sent to the My Messages boxes of the coach and the trainee. In addition, if their user profiles include e-mail addresses, notifications are sent to their e-mail addresses. The notification e-mails include an **iCal** file. When this attachment is opened, the session is automatically added to the user's Outlook calendar.

Adding and Managing Session Interaction Lists

Once a coaching session is open, you can add interactions to it. Interactions are added as interaction lists. Two types of interaction lists can be added:

- **Saved Searches:** Sets of interaction search criteria that can be used to retrieve lists of interactions.
- **Interaction Lists:** Lists of interactions that were created manually by adding specific interactions. The interactions can be added from an Interaction or Event grid or from a Media Player.

> **Important**
> For additional information about the two types of interaction lists, see Saved Searches.

Interaction lists can be added in the **Session Details** screen, in setup mode. Once they have been added, the lists can be modified by adding more interactions and removing existing interactions. Modifications that are made to an interaction list in the **Coaching** page do not affect the original interaction list.

Adding Existing Global Interaction Lists to a Session

The simplest way to add interaction lists to a coaching session is to select existing global interaction lists and copy them to the session. When a global interaction list is added to a coaching session, a copy of the original list is made and attached to the session. The copy becomes a coaching-session interaction list, and is not linked to the original global interaction list. It can only be viewed from the coaching session. From within the coaching session, you can add or remove interactions from an attached interaction list and change the search criteria of a Saved Search. These modifications do not affect the original, global interaction lists or Saved Searches.

1. In the **Session List** screen, click the **Edit** icon file:Smicon edit.png associated with the session to which you want to add an interaction list.
2. Under **General Details**, click the **Add call list** file:Smicon newsession.png icon next to **Calls**.

   A list of global interaction lists and global Saved Searches appears.

3. Select an interaction list.

   The list closes and a copy of the interaction list is created and attached to the session. The added interaction list appears in the relevant section (**Interaction Lists** or **Searches**) under **General Details**.

You can also add existing interaction lists to a coaching session from the Saved Searches page.

Creating New Interaction Lists within a Session

1. In the **Session List** screen, click the **Edit** icon file:Smicon edit.png associated with the session in which you want to perform a search.
2. In the **General Details** screen, on the left side of the screen click **New Search**.

   An Interaction Search form opens on the right side of the screen.
3. Fill in the search criteria.
4. Click **Search**.

   The search results appear to the right of the form.
5. Select the check box next to each interaction you want to add to the interaction list.
6. At the top of the list, under **Batch Actions**, select **Add To** > **Coaching** > **New Session**.

   A new sessions window opens.
7. Give the session a name and fill in the remaining fields.
8. Click **Save**.

Modifying Session Interaction Lists

Once an interaction list is attached to a Coaching session, you can add interactions to it or remove them as necessary. Interactions can be added to an interaction list from any Interaction or Event Grid or from the Media Player. You can also remove interactions from a list. If the interaction list was copied from a global list, the global list is not affected by changes you make to the coaching-session list.

To remove interaction from an interaction list:

1. Under **General Details**, click the name of the interaction list. The list opens in an Interaction Grid on the right side of the screen.
2. Select the checkbox to the left of each interaction you want to remove from the interaction list.
3. Under **Batch Actions**, select **Delete From List**. The selected interactions are removed from the list.

Removing an Interaction List from a Session

1. Under **General Details**, click the x to the right of the name of the interaction list. You are prompted to

confirm that you want to remove the interaction list from the session.

2. Click **OK**. The interaction list is removed from the session.

Adding and Managing Session Notes

Session notes can be defined as public or private.

- **Public notes** are visible to everyone who accesses the session. They are generally intended to help trainees understand the purpose of the coaching session and draw their attention to the aspects of the interactions that need to be highlighted.
- **Private notes** are only visible to the person who writes them. You can use them to add reminders or comments to yourself. For example, when you create a session, you can leave yourself a note reminding you to add a link later, when you have the URL of the link.

Notes can be added to a session when it is first opened (see above) or at any other time. The notes are displayed in the Session Details that can be viewed beside the session list in the **Session List** screen and in the **Session Details** screen. You can also edit and delete existing session notes.
To add a note to a coaching session:

1. In the **Session Details** screen, in the title bar of the **Notes** box, click **New**. A blank **New Note** form opens.

> **Important**
> If the **Notes** box is not visible, in the upper-left corner of the screen, click **General Details**.

2. Type the note in the text field.
3. In the dropdown menu, select Public if you want the note to be visible to anyone who can access the session or Me if you only want the notes to be visible to you.
4. Click **Add**. The note is added to the session.

To edit or delete a note:

- In the **Session Details** screen, in the **Notes** box, select **Edit** or **Delete** as necessary.

Adding and Managing Action Items

You can add Action Items to a coaching session. For example, if you want the trainee to perform a particular task as part of a coaching session, you could open an Action Item in that coaching session to specify that task. When you open an Action Item within a coaching session, the Action Item appears in the coaching session and can be managed from there. It also appears in the general Action Items box, like other Action Items, and can be managed from there as well.

> Important
> For detailed information about working with Action Items, see Action Items.

To create an Action Item in a coaching session:

1. In the **Session Details** screen, click the **Action Items** link in the top right corner of the screen.

   The **Action Item** dialog box opens below the link with a list of the existing action items.

2. Click **New Item** and configure the fields as necessary.
3. Click **Ok**.

   The Action Item is created and appears in the **Action Items** box in the **Session Details** screen. In addition, it is added to both your general **Action Items** box and in the assigners general **Action Items** box.

> Important
> For information about the fields of the **Action Item** dialog box, see Creating a New Action Item.

Adding and Managing Links

You can add links to external files, websites, and SpeechMiner Permalinks to a coaching session. For example, if you want the trainee to look at a relevant website, you can add a link to the website. During the coaching session, when the trainee clicks the link, a new window is opened and the link is displayed. For example, if you add a link to a website, a new browser window opens and displays the website. To add a link to a coaching session:

1. In the **Session Details** screen, on the left side of the screen, under **General Details**, click the + sign beside **Links**. An **Add Link to Session** dialog box opens.

   300px

2. Under **Description**, enter a description for the link.
3. Under **Link Text**, enter the location of the link. For example, to add a link to Google, type

`http://www.google.com`.

4. Click **OK**. The dialog box closes, and the link is added to the list of links that appears under **General Details** under Links.

To edit a link:

1. Under **General Details**, under **Links**, click the file:smicon_sessionactionopen.png beside the link you want to edit. An **Add Link to Session** dialog box opens.
2. Modify the **Description** and **Link Text** as required.
3. Click **OK**. The dialog box closes, and the link is modified.

To go to a link:

- Under **General Details**, click the link. A new browser window opens and displays the link.

To delete a link:

1. Under **General Details**, click the x beside the link you want to delete. You are prompted to confirm that you want to remove the link from the session.
2. Click **Yes**. The link is deleted.

Managing Session Properties

Session properties - name, schedule date, trainee, coach, session type - are defined when you open a new session. You can modify these properties as necessary. To modify session properties:

1. In the **Session Details** screen, in the title bar of the **General** box, click **Edit**.

> **Important**
> If the **General** box is not visible, in the upper-left corner of the screen, click **General Details**.

2. The properties of the session become text fields. Modify the text fields as necessary.
3. Click **Save**. The changes are saved.

Reports

Coaching Session Reports

Coaching session reports provide statistical information about the coaching sessions in the Session List. The reports break down the sessions by status and indicate how many have not yet been started by their trainees, how many are in progress, and how many have been completed. In addition, they show how long trainees already spent, on average and in total, on the sessions in each category.

Additional details about the sessions included in the report appear in the lower half of the report. The details are divided into groups by trainee. You can expand a session to see additional information about it. You can also open its **Session Details** screen directly from the report.

Generating a Report

Coaching reports can be generated in the Sessions screen. Two forms of the report are available:

- **General report:** This report includes all coaching sessions that are included in the set defined by the Session List's general filters. For example, if the general filter specifies **My Sessions** for Sept. 1st through Sept. 30th, and included Completed sessions, all session that meet these criteria are included in the report. (Column filters do not affect the criteria.)
- **User report:** This report includes all sessions that are included in the set defined by the Session List's general filters and belong to a specific user. That is, if the user is either the creator, coach, or trainee of a session, the session is included in the report.

To generate a general coaching report:

- In the **Sessions** screen, at the top of the list, click the Run Report button file:Sm runreport.png. The report is generated and is displayed in a new browser window.

To generate a user coaching report:

- In the **Sessions** screen, in a row in which the user is the trainee of the specified session, under **Actions**, click file:smicon_sessionactionreport.png . A report for all sessions in which the trainee is either the creator, the coach, or the trainee, is generated and is displayed in a new browser window.

Viewing Report Details

The lower part of a generated report lists the sessions that were included in the report. The sessions are grouped by trainee. The name of each session, the name of the coach, the date it was scheduled to take place or the date on which its status was last changed, the status, and, if the session was already begun or completed, the amount of time the trainee spent on it so far, are displayed. You can view additional details about the session, listen to interactions that the trainee listened to during the session, and open the Session Details screen for the session. To view additional details about a session:

- Click the + beside the session name. Notes and resources (links) included in the session are displayed below the session name, as well as links to all the interactions that the trainee listened to during the session.

To play an interaction that appears in the expanded list:

- Click the interaction link. The Media Player opens in the window, and plays the interaction.

> **Important**
> To return to the report, press Backspace.

To open a session in the **Session Details** screen:

- Click the name of the session. The **Session Details** screen opens in a new browser window.

Managing Sessions

Managing Session Types

Each coaching session has a type assigned to it. The type can help identify the purpose of the session and the type of trainee it is intended for. By default, one session type, General, is defined. You can add additional session types as appropriate for your organization.

Once a session type is saved, you cannot delete it. However, you can deactivate it if you do not want it to be available at present. (The General type cannot be deactivated.) In addition, you can modify the name of an existing session type as necessary.

> **Important**
> For information about assigning session types to coaching sessions, see Creating a New Coaching Session.

To manage session types:

- In the main menu, under **Coaching**, select **Session Types**. The **Session Type Manager** opens and displays a list of the session types that are currently defined and their statuses.

400px

To add a new session type

1. Under **New Type**, type the name of the new session type.
2. Click **Add**. The session type is added to the list and its status is set to **Active**.
3. Click **Save**. The **Session Type Manager** closes, and the new session type is included in the list of available session types.

To activate or deactivate a session type

1. Under **Is Active**, click the check box beside the session type to select or clear it. The session type is active when a checkmark appears in the checkbox.
2. Click **Save**. The **Session Type Manager** closes, and the change is implemented.

To modify the name of a session type

1. In the list of session types, modify the name as necessary.
2. Click **Save**. The **Session Type Manager** closes, and the change is implemented.