



# Frontline Coaching Checkup

Five high-impact diagnostic questions and Best Practices for banking leaders who want to improve CX performance and execution

01

## Do we coach behaviors, or just track and share scores?

✓ Best Practices

- Define clear service standards tied to actual behaviors.
- Use real examples (calls, interactions, branch observations).
- Provide structured coaching frameworks.

02

## Is coaching consistent across teams and managers?

✓ Best Practices

- Use standardized coaching tools and metrics.
- Conduct regular leadership calibration sessions.
- Track coaching frequency and quality, not just employee performance.

03

## Is training continuous or intermittent?

✓ Best Practices

- Integrate focused skill-building and weekly reinforcement.
- Tie training directly to current performance gaps.
- Use real-time customer data to shape learning priorities.

04

## Can we clearly connect coaching to business impact?

✓ Best Practices

- Link service behaviors to measurable outcomes.
- Track progress and patterns over time.
- Adjust coaching focus based on team-level results.

05

## Do employees see coaching as developmental or punitive?

✓ Best Practices

- Position coaching as professional growth-focused.
- Recognize and reinforce positive behaviors.
- Ensure transparency in scoring and expectations.

