

## Insight7 Call Center Coaching Form Template

### 1. Agent & Session Details

Field	Entry
Agent Name	<hr/>
Agent ID	<hr/>
Team/Department	<hr/>
Date of Session	<hr/>
Coach/Supervisor	<hr/>

### 2. Interaction Details

Field	Entry
Call/Interaction Date	<hr/>
Call Duration	<hr/>

Channel (Phone/Chat/Email)	_____
Customer/Case ID	_____

### 3. Coaching Focus & Objectives

*Check all that apply:*

- Customer Service Skills
- Communication & Empathy
- Call Handling & Control
- Sales/Objection Handling
- Compliance & QA
- Product Knowledge
- Other: \_\_\_\_\_

Session Objective:

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### 4. Performance Metrics & Behaviors

Area	Rating (1-Poor to 5-Excellent)	Notes/Examples (Timestamped if possible)
Average Handle Time (AHT)	___	_____
First Call Resolution (FCR)	___	_____
Customer Satisfaction (CSAT)	___	_____

Call Control & Flow	—	_____
Active Listening	—	_____
Empathy & Tone	—	_____
Compliance Adherence	—	_____
Other: _____	—	_____

## 5. Call Review Highlights

Strengths/Praise:

\_\_\_\_\_

Opportunities/Improvement:

\_\_\_\_\_

Key Call Moments (Timestamps):

\_\_\_\_\_

## 6. Agent Self-Assessment

- What went well?

\_\_\_\_\_

- Areas for improvement?

\_\_\_\_\_

- Support or questions?

\_\_\_\_\_

## 7. Coaching Feedback & Recommendations

Strengths to Continue:

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Areas for Growth/Suggestions:

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Recommended Resources/Support:

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## 8. Action Plan & Next Steps

- AGENT GOALS for Next Review:

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- Training/Resources Needed:

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- Follow-Up Session Date:

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## 9. Acknowledgment

By signing, both coach and agent commit to the agreed feedback and action plan.

Signature (Agent)	Date	Signature (Coach)	Date
<hr/>	<hr/>	<hr/>	<hr/>

Empowering agent success. Enhancing customer experience.

Insight7 · Transforming Contact Center Coaching