REVINATE

SCORING AND COACHING GUIDE

Contents

Why Score and Coach?

Scoring your agents' calls and providing them with consistent, targeted coaching is the single most important thing you can do to increase reservations revenue in the shortest amount of time. In fact, years of client success using REVINATE Reservation Sales Suite Scoring and Coaching tools and Best Practices has shown a direct corollary between conversion rate and consistent, targeted scoring and coaching.

Scoring Calls

Consistency

In order to realize your revenue goals, call scoring and coaching must occur regularly. We recommend scoring a minimum of 5 lead calls every two weeks that include a mix of "Hot Leads" and "Not Booked" calls, and emailing the scored call feedback to your agents. Regular call scoring gives you insight into how your agents are handling sales opportunities so you can coach behaviors that will ultimately enable more Not-Booked calls to become "Hot Leads," and more "Hot Lead" calls to be converted. We also recommend focusing on 4-6 minute calls, as this is generally plenty of time to reveal your agents' sales skills and areas of opportunity, while still enabling you to manage your time wisely.

Consistent call scoring signals to your team that regular oversight is occurring and reservation agents will be held accountable to meet team and individual goals. Scoring calls throughout the month also gives you a clearer picture of your agent's overall performance, rather than attempting to score 10 calls in the final week of the month. Using a narrow time period with potentially unique circumstances could negatively impact an agent's score. Additionally, scoring calls throughout the month gives agents the opportunity to adjust their behavior to meet team and individual goals by month-end.

When time is limited, do not forego scoring altogether, but rather focus your attention on your under-performing agents who consistently fall short of your team conversion, revenue or other goals, yet are not your weakest performers. Use Reservation Sales Suite reports data to assist you in identifying these "middle performers." Efforts spent on scoring and targeted coaching these agents will have the most impact on conversion and revenue in the shortest amount of time.

Time Management

Despite best laid plans, that perfect quiet time to comfortably score calls without interruption almost never happens. To ensure that all agents receive a minimum of 5 scored calls every two weeks (a minimum of 10 per month) we recommend dedicating time in your calendar to score and audit calls each day, or at regular times throughout the week. This time should be protected and respected by your staff as scoring is an important tool in guiding the success of your reservations team. Below is sample of what a bi-monthly scoring and coaching plan might look like for a team of five agents - Ann, Bonnie, Charles, David and Emily.

Monday **WEEK ONE**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
8 – 9 am Call Result Audits/ Review KPI metrics and progress toward goals	8 – 9 am **Scoring 5 calls** - Ann (3), Bonnie (2) Email results	8 – 9 am **Scoring 3 calls** - Charles (3) Email results *Call Result Audits (Agents AB – 5 calls each)*	8 – 9 am **Scoring 5 calls** - David (3) Emily (2) Email results	8 – 9 am Call Result Audits (Agents CDE– 5 calls each)
Monday **WEEK TWO**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
8 – 9 am Call Result Audits/ Review KPI metrics and progress toward goals	8 – 9 am **Scoring 5 calls** -Ann (2), Bonnie (3) Email results *Write Coaching* *Notes*	8 - 8:30 am *Call Result Audits (Agents AB – 5 calls each)* ********* **COACHING** Ann - 4:15 - 4:30 pm Bonnie – 4:45 - 5:00 pm	8 – 9 am **Scoring 4 calls** - Charles (2) David (2) Email results *Write Coaching* *Notes* ********* **COACHING** Charles - 4:15 - 4:30 pm David - 4:45 - 5:00 pm	8 - 8:30 am **Scoring 3 calls** - Emily (3) Email results *Write Coaching* *Notes* 8:30 – 9:00 am *Call Result Audits (Agents CDE– 5 calls each)* ********* **COACHING** Emily - 4:00 - 4:15 pm

This model shows scoring and coaching taking place on a rolling bi-weekly basis. This enables agents to know when their next coaching session is occurring and allows you to fold this important task into your regular routine so that it becomes a productive, sustainable habit.

Reservation Sales Suite Tools

The Call Scoring Module in the Reservation Sales Suite has a default template loaded with the REVINATE Non- Negotiables. You can revise the scoring criteria to customize your team's call flow, or create custom templates that focus on specific aspects of a call such as overcoming objections, saving cancellations or managing difficult customer calls. If you do use a customized template, be sure that this template is selected as the KPI Default template so that scoring and coaching metrics are included in the comprehensive KPI-Key Performance Indicator data.

The REVINATE Non-Negotiables template below provides an outline of the critical elements contained in a successful reservation sales call flow. REVINATE clients who have adopted this scoring criterion into their call flow have, overall, seen a higher increase in their conversion rate than those who have not. By further defining the Non-Negotiables into smaller components Reservation Sales Managers have clear guidelines as to what to listen for when reviewing calls that minimize the subjectivity of what is, for example, a "Proper Greeting." This
enables you to target your coaching to specific components of a call and set understandable, attainable goals for improvement.

Non-Negotiable	What to Listen For	Value
Utilizes Proper Greeting and Gathers Contact Information	* Thanks the caller for calling (company). * Asks for name of the caller. * Offers their name. * Asks for call back number.	5 Points
Asks Effective Open Ended Qualifying Questions and uses Interactive Dialogue with Caller	* Asks qualifying questions to identify their guest's needs. * Gives personal tailored recommendations based on the caller's answers. * Uses information provided to build rapport and sell the experience.	10 Points
Effectively Personalizes and Engages in Conversation with the Guest	* Uses callers name conversationally, but discreetly throughout the call * Uses information learned through discovery to build rapport with caller. * Shares a bit of self, when relevant.	5 Points

Gives Tailored Recommendations to the Guest's Desired Experience	* Uses information gathered through qualifying questions to make tailored recommendations for the guests' specific needs. * Exhibits a genuine sense of interest and concern for the caller's satisfaction. * Leads the conversation and demonstrates the ability to anticipate needs.	10 Poin t s
Maintains a Positive Tone using Professional, Confident and Courteous Language	* Uses a polite pace that is appropriate, clear, calm and easily understood by the caller. * Maintains an enthusiastic, yet gracious tone. * Drives entire call with confidence and pride.	5 Poin ts
Asks for the Reservation	* Specifically asked for the reservation (Holds do not count). * Asks for the reservation after effectively selling the tailored experience to the guest. * Attempted to Overcome Objections	10 Poin t s
Proper Call Closing	* Politely closes with sincere appreciation. * If not booked, offers follow up email. * Re-brands business using name. * Gives anticipatory remarks.	5 Poin ts

The value or "points" associated with each Non-Negotiable are configured to emphasize the importance of specific criterion. Asking open-ended questions while maintaining an interactive dialogue with the caller, offering tailored recommendations based on what the agent learned throughout the call and asking for the reservation are the three most important things your agents can do when handling a lead call. Using the Non- Negotiables as call flow guide will enable agents to "earn the right" to ask for the sale, even if it is unclear that the guest is ready to book. Many times callers who seem to only be "rate-shopping" at first are persuaded to book in the hands of an artful agent who asks for the sale.

Feedback

When scoring calls, it may be tempting to give agents extra consideration for good "efforts," especially if this process is new and agents are a little anxious. It also may be tempting to reward your most resistant, or sensitive agent with a 100% score in an effort to keep them smiling and engaged in the process. However, this approach is not recommended for a number of reasons. First, it undermines your ability to facilitate change when you reward behavior that is less than ideal. It also sets a precedent that is difficult to overcome when accurate feedback is ultimately delivered. Imagine a student who has consistently received straight A's suddenly finding themselves staring down a C- after delivering the same work product week after week. Their logical response would be “My work was A-quality last week and C- this week. What happened?” Such inconsistency can undermine morale, and contribute to uncertainty and dissention within your team.

Instead, be honest, bold and true to the changes you desire. When listening to a call, if a specific scoring criterion has not been met to your expectations, then score the item as “NO.” There should be no gray area. If you are not sure, then choose “NO.” Only use “YES” if the agent meets your expectations 100%. To manage expectations, make certain that your agents are aware of your approach to scoring. Communicating this important detail could help to mitigate any bargaining during coaching sessions and disappointment amongst the team.

When offering scoring feedback, be sure to clearly communicate your expectations in your summary and provide constructive comment(s) for each item, not just the items that need improvement. Noting “nice work” or “great job!” is not sufficient feedback. Tell them why and offer details. During your coaching session, listen to a recorded example of what the agent did great, in addition to calls that need improvement. Positive reinforcement is one of the most powerful tools in your coaching toolbox.

The Call Scoring Module in The Reservation Sales Suite allows you to email a copy of the scored call to the agent immediately after it is scored. Do this consistently. The point of scoring calls is to improve your agent’s performance. Giving agents your immediate feedback allows them to make adjustments in their behavior today, rather than waiting until their next coaching session. It also reminds your team that you are holding them accountable. Remember that even if you write detailed scoring notes, it is critical to coach agents on your findings. Scoring alone will have much less impact on your agents’ performance when compared to scoring and coaching combined.

If you or your team are new to the scoring process, cultivating agent buy-in to the process is essential to success. Discussing the WIIFM (What’s in it for me?) is one way to approach this. If you have a robust incentive plan, make certain your agents understand what they need to accomplish in order to receive monetary benefits. Reinforcing this by prominently posting team goals and agent individual metrics on a publicly displayed white board can help to stimulate friendly competition that drives your whole team toward your revenue goals. Creating opportunities for professional growth and leadership responsibility within your organization is another way you can encourage agents to improve their sales skills.
Finding out what motivates your team is essential to this process. Not all reservation sales agents are motivated by money or the possibility of more responsibility. After digging deeper, you may find that the secret to maintaining a happy, productive sales team is public or private praise and recognition for a job

well done. If budget is a concern, there are many creative inexpensive ways to do this. Your Client Success Strategist can assist you in brainstorming ideas including self-funded options and what has worked well for other reservation teams that are similar to yours.

One proven approach to gaining your agents' buy in to the scoring process is tasking them to bring two calls of their choosing to discuss at each coaching session – one "100% 7 Non-Negotiables" call, and one "challenging" call. This allows your agents to contribute to their own learning process by critically analyzing their own calls. Agents can also manually score calls at any time using the Agent Self-Scoring Template located in the REVINATE Knowledge Base under the "Coaching" category. All of these options give you insight into how your agent views their own performance and how willing they are to make changes. Note that agent-identified calls should be used for discussion only and should never be a substitute for your scoring evaluation of lead calls.

Coaching

Coaching can be defined simply as the process of identifying and motivating the change of certain behaviors. Effective coaching enables individuals to realize their greater potential by developing the means to incrementally achieve it.

On a daily basis, reservation sales agents interact with different types of people from all around the world via the voice channel. This is not an easy job. In fact, phone sales come with a unique set of challenges that any agent could expound upon. Agents are not only tasked with representing your brand in an upbeat, positive professional way, they are responsible for approaching each call with intent to sell. Using the REVINATE Non- Negotiables or your customized call flow, agents are additionally tasked to discover the caller's needs and desires to aid them in closing the sale, while capturing critical lead data that can be used for future marketing.

As with all professions, reservation sales agents develop habits during the course of their careers that can be both positive and negative. These habits are formed through experiences and interactions with customers and co-workers. They are also influenced by the agent's own desire to achieve excellence. Positive habits can be reinforced by consistent public and private recognition and reward for a job well done. Negative habits that impact your revenue and behavioral goals need to be identified and modified by targeted coaching to an achievable short-term goal. The challenge to a reservation sales manager or supervisor is to develop a strategy that can successfully and consistently convert negative habits into positive ones.

Time Management

Build agent coaching into your work week calendar in the same way you make time for scoring or auditing calls to ensure this important building-block for positive change is not neglected. We recommend coaching your agents a minimum of twice a month, and more often with new hires or low-performing agents who are taking a large percentage of calls. The key to coaching success is consistency. Unless there are extenuating circumstances such as a new hire with lots of questions, or a thorny reservations challenge, a fifteen-minute coaching session every two weeks for each agent should be your goal.

Coaching sessions do not always have to be formal, sit-down meetings in order to be effective. They can be a mix of quick "stand up" sessions, as well as regularly scheduled meetings. Additional ad-hoc meetings with individuals or a group may also occur due to errors or issues requiring immediate attention. The idea is to build rapport and trust with your team by demonstrating frequent, active, visible involvement in your team's performance. The more engaged you are, the more success you are likely to have in a coaching session because your agent knows you have a clear understanding of their job challenges and successes.

When time is limited, do not forego coaching altogether, but rather focus your attention on "middle performing" agents who are consistently falling short of your team's conversion, revenue or other goals. There are a number of reports in The Reservation Sales Suite that can assist you in identifying agents that may only need to make minor adjustments in order to meet goals.

The KPI – Key Performance Indicator Report (Reservation Sales -> Reports -> KPI Report) is highly recommended since it measures individual agents' performance against team goals for the current month, and provides last month and this month last year data for comparison. It also converts activity that falls short of your KPI goals into lost opportunity dollars, showing you how much an agent's behavior is costing you. Note that you must enter monthly goals into the KPI Report to leverage the full functionality and benefits (Reservation Sales -> Account Settings-> KPI Goals).

Additional reports such as Compliance and Email Lead Rate (Reservation Sales -> ELM -> Compliance Reports) identify how well your agents are capturing lead data. The Call Results Exception Report and Call Results Audit Report (Reservation Sales -> Reports -> Scoring/Monitoring Reports) show how accurately your agents are coding call results. The Outbound Call Conversion Report (Reservation Sales -> Reports -> Conversion reports) shows how many Outbound Calls your agents are making via ELM and how well they are converting these opportunities. Lastly, Call Center Reports such as Agent Productivity, Agent Handle Time and Average Speed of Answer (Reservation Sales -> Reports -> Call Center Reports) show how your agents are managing their time and productivity.

Manager Preparation

Scoring calls based on static criteria is one thing. Knowing how to use this information to increase the performance and productivity of your reservations team is another. This is the driving force behind coaching. To prepare for an effective coaching session, we recommend doing the following:

1. **Schedule coaching sessions in advance** and do not deviate from this schedule unless absolutely necessary. This enables your agent to prepare and adjust their behavior to meet the goals defined intheir previous coaching session.

2. **Review the agent's previous coaching session goals**. Compare this to your current scoring feedback. Did the agent meet your expectations? If not, has the agent made efforts to change? Note the challenges and successes for use in your coaching session.

3. **Compare your call scores and feedback to REVINATE Reservation Sales Reports data**. Seeing the total picture of your agents' performance will assist you in prioritizing your coaching goals. Recommended Reservation Sales reports to review include:
    a. KPI Report (Reservation Sales -> Reports) - look at individual metrics as compared to the team goal in all areas. Compare this month's data to last month (LM) and this month last year (TMLY) to identify trends and lost or gained revenue opportunities.

    b. Call Results Exception Report (Reservation Sales -> Reports -> Scoring/Monitoring Reports) - look at individual metrics as compared to the team goal. This can be a great place to begin call scoring as this report allows you to click through hyperlinked data all the way to the call recording and the scoring template.

    c. Call Results Audit Report (Reservation Sales -> Reports -> Scoring/Monitoring Reports) - look at how many and what type of call results were changed to identify trends and coachable opportunities.

    d. Scoreboard Report (Reservation Sales -> Reports -> Scoring/Monitoring Reports) – a comprehensive report to easily view an agent's number of lead calls versus bookings, revenue, booking channel, call results audits and compliance percentage.

    e. Lead Email Rate (Reservation Sales -> ELM-> Compliance Reports) - look at individual metrics as compared to the team goal. Audit "RTG" calls on a regular basis to ensure agents are not choosing this option to artificially inflate their compliance percentage

    f. Not Booking Report (Reservation Sales -> Reports -> Lead Reports) - Examine the Not Booked Reasons chosen by agents to reveal trends and coaching opportunities. For example, a percentage of "Not Booked -> Rate Resistance" leads that differs significantly from the team could indicate a need for coaching on stressing value before price or overcoming objections.

g. Outbound Call Conversion (Reservation Sales -> Reports -> Conversion Reports) – look at the number of outbound calls an agent has made from within ELM and any associated outbound revenue as compared to their inbound call revenue.

h. Agent Handle Time Analysis (Reservation Sales -> Reports -> Call Center Reports) – Review your agents' Handle Time to see whether an agent has very high talk times or very low talk times as compared to the team. Monitor high talk time to ensure the agent is maintaining control of the call, asking discovery questions, not offering too many choices, or sharing so many details about themselves or your property that they lose the confidence of the guest. Low talk time is an indicator that the agent is not using any sales tactics at all, but are "Turning and Burning" calls. This is the classic "order taker" approach to sales that misses numerous sales opportunities. These agents typically have high volume of calls answered, but a low conversion. In many instances they end up creating Hot Leads for other agents to follow up

4. **Prioritize 1-3 issues to be the "Start" actions for your current coaching session**. If there are many performance challenges, consider choosing the topics that have the most impact on revenue. For example, an agent with a high conversion rate, with an equally high and costly error rate is an issue that needs to be addressed. When prioritizing issues, look at "the BIG picture" and strategize accordingly. Remember that some goals, such as conversion, should change with the seasonality of your business.

   While your agent may not be comfortable expressing that a goal seems unreachable, be aware that a goal that is not attained could be a goal that was not reasonably attainable.

5. **Write your coaching notes in advance.** This way you and your agent will be able to review these together and make any needed adjustments during your session. This also provides guidelines for you to ensure the coaching session stays on task and does not deviate into other topics or challenges.

Note that an agent struggling with reservation sales may also have additional performance issues unrelated to sales such as tardiness, poor attitude, a high error rate, and more. Although it may be tempting to combine general employee performance and sales coaching into one session, this is not recommended. Keep sales coaching issues separate from Human Resource issues so the agent has a clear sense of what is expected from them from a sales standpoint.

Agent Preparation

In the spirit of cooperative, professional coaching, agents should also prepare for their coaching sessions as this 1:1 time with their manager will help them become even better at what they already do well. Professionals in a variety of arenas, from athletes, to vocal performers, to business executives, embrace coaching as a way to sharpen their skills and improve in incremental ways. However, simply sitting through a coaching session will not automatically create change. A positive attitude and willingness on the part of the agent to buy-in to new approaches and constructive feedback is key to true professional development. Below are some suggested ways an agent can approach a coaching session to get the maximum benefit:

1. **Read and digest the notes on all newly-scored calls**. Agents with questions should go back and listen to the call and make additional notes as needed to bring to their session. This is not to defend themselves, but to listen critically to where and how they might handle a similar call differently in the future
2. **View previous coaching notes and goals**. Agents should be prepared to discuss why coaching goals were not met, or to celebrate meeting or exceeding goals!
3. **Bring issues or challenging calls to discuss during coaching.** Agents can save and email call recordings to their manager, or send them the Inbound Call Tracking date/time stamp of specific calls in advance of their coaching session.
4. **Bring successes to share!** Managers like good news too. Sharing and celebrating successes reinforces the positive relationship between you and your agent, making it easier to discuss behavior challenges when they arise.
5. **Be prepared to "role-play."** After discussing issues of concern and alternate approaches, agents should be open to role-playing scenarios that may have challenged them. Talking about challenges and change alone is not sufficient. To be better prepared for the next opportunity, agents have to practice, practice, practice!

Remember that relational coaching involves two willing participants who jointly buy-in to the goals at hand and are motivated to meet or exceed these goals. If either the agent, or you, approach coaching as a necessary evil that neither enjoy, nor see value in, the results will be disappointing all the way around.

"Keep, Stop, Start"

We recommend a relational approach to coaching. This means less top-down, one-way delivery of information from you to your agents, and more discovery questions and role-plays to learn what challenges and motivates your team. Although time is always at a premium, a coaching session should begin with a warm greeting and open-ended questions such as "How are you? What happened in the last few weeks that you feel great about? What was your biggest challenge?" When you take a few minutes to genuinely "check in" before digging into a coaching session, you are nurturing the reciprocal trust/respect relationship with your agent, something that will enhance the impact of your strategic guidance and counsel.

The “Keep, Stop, Start” coaching approach is a simple, effective relational coaching tool as it begins by acknowledging positive behaviors – the ones you want your agent to KEEP doing, transitions to what you want them to STOP doing, and closes with clear, easy to understand attainable goals using the START prompt. Since your agents have immediate access to your emailed call scoring notes, they should not be surprised by your coaching notes and goals. Unless new issues demand immediate attention, coaching sessions should be a place to review whether goals were met or not, rather than the place where opportunities for improvement are first presented.

An important component of the relational coaching approach is the inclusion of the “WIIFM” – what’s in it for me? The harsh truth may be “continued employment,” but this is simply not an effective way to motivate a team. If you have a monetary incentive program, or any ability to tangibly reward behavior with onsite amenities, stay nights at your property, gift certificates, parking spaces, or public recognition, let the agent know where their behavior placed them in relation to receiving these incentives. Incentives will not be effective if the agent does not know what they need to do to earn them.

Note that not all reservation agents, or all people for that matter, are motivated by the same things. An agent with a busy young family, or a student with lots of homework, may enjoy paid time off more than a monetary reward. A hard-working ambitious employee may be motivated by the idea of added responsibility, change in title or leadership opportunities. How will you know what motivates your team? Ask them! Whatever you discover, keep incentives fresh and the criteria to meet them dynamic. Incentive plans that can be reached with minimal effort, month after month, tend to foster complacency, rather than goal-sensitive action. If you find yourself in a situation where goals are consistently unmet, but agents are still expecting a bonus, discuss ways to reverse this trend with your Client Success Strategist.

Coaching sessions offer a wonderful opportunity for safe, effective role-play. In a practice environment, agents can try out new approaches to asking for email, the sale, or various ways of controlling a sales call with their manager playing the customer. Alternatively, the manager can demonstrate how an agent might handle sales or customer challenges with the agent demonstrating some of the caller scenarios they have found most challenging. Role-playing is not only an effective way to learn, it demonstrates to the agent that their manager is willing to dig deep, and “get their hands dirty” to experience and effectively manage what has challenged their team. A manager who has the confidence to role-play earns a great deal of respect from their team, something that has a significant effect on relational coaching success.

Before ending a coaching session, it is important to reaffirm goals with your agent. Have them express their goals in their own words to ensure that they understand the tasks at hand and feel as though they have the tools to meet these goals? Agents should never leave a coaching session unsure of the next steps or how they will accomplish them. If there is hesitation or concerns expressed, verbally or nonverbally, flesh this out with more discovery questions.

Follow Up

Follow up is a critical component of effective coaching. When you coach and score inconsistently and do not take the time to follow up on goals, you are implicitly telling your team that they will not be held accountable for goals, no matter how many motivational signs or monthly goal postings there may be around the office. Your actions speak volumes and your team is paying attention.

One way to follow up on questions and challenges shared in individual coaching sessions is to discuss them in group coaching sessions. Sales role-play games and other group activities relating to asking discovery questions, making recommendations and “earning the right” to ask for the sale are some ways you can make the most of group sessions. Using all the experience of a group to discuss “best practice” approaches to rate concerns and other sales objections will build relationships, strengthen team spirit, and create an open forum where agents can share mutual concerns and challenges without fear or embarrassment. Group sessions also enable you to reinforce or alter existing policies in a way that gets agent buy-in because they participated in the process.

Changing work habits that have been formed over the years will take time, dedication, motivation, and will by the coach and the agent. When coaching sessions do not have the desired effect, the blame is often placed on the individual being coached. However, another possibility exists. YOU. Critically examine your efforts, communication and coaching/scoring consistency to ask “Am I an effective coach?” If you have inconsistently scored and coached, given limited details in your feedback, set unrealistic expectations and have been visibly absent and disengaged from your team, you are likely to be disappointed with the results. Discuss these challenges with your Client Success Strategist so they can help by “coaching the coach” and aiding you in setting attainable goals.

The benefits of effective coaching will yield a multitude of rewards for your organization. Agents who are coached effectively will not only improve their performance, but begin to develop a sense of ownership and belonging. When agents understand their important role in the company and are recognized and rewarded for their contributions, they are much more willing to adjust their behavior in order to continue to foster that great feeling of accomplishment and team spirit.

On the other hand, what if you ARE coaching regularly and effectively, seeing positive changes in all your agents' behavior except for one or two people? How long do you keep reiterating the same goals to the same agent without seeing any signs of improvement? There is no perfect answer to this question. Hiring and training new staff comes with its own set of challenges and demands on your time. Seasonality could also impact whether you and your veteran agents have the ability to onboard a new hire. The good news is that consistently using the REVINATE Scoring Module to document expectations and outcomes provides you with the necessary documentation to support a change in staff if needed. Since historic coaching data is always accessible to the agent, on- demand, there is no excuse for not knowing your expectations. In fact, when consistent scoring and coaching becomes the norm, rather than the exception, agents who do not want to change their behavior may simply choose to “opt out” of the team rather than contend with consistent negative feedback.

Manager Resources

Call Scoring and Coaching - REVINATE University

This course introduces the basics of Scoring and Coaching using the REVINATE Call Scoring Module. You must have a REVINATE University login and password to access this course. Please contact Education@REVINATE.com to request logins.

Example Call Recordings – REVINATE Knowledge Base -> Coaching Category

These examples can be used in individual or group coaching sessions to demonstrate successful ways of using the REVINATE Non-Negotiables in a call flow. Sample recordings are divided into Hotel/Resort and Vacation Rental calls so you can use the training recordings that are appropriate for your business. Samples include greetings, obtaining contact information, asking for the email, interactive dialogue, asking open-ended discovery questions, personalizing the conversation, and asking for the sale. In addition, there are complete, unedited calls that have positive and negative aspects that can be used to practice call scoring.

Recommended Coaching Resources

Below is a list of recommended resources to support the learning and development of reservation sales coaches.

Fierce Conversations. Achieving Success at Work & in Life One Conversation at a Time. Scott, S. (2004)

Everyone Communicates, Few Connect. What the Most Effective People Do Differently. Maxwell, John C. (2010)

FYI: For Your Improvement – For Learners, Managers, Mentors, and Feedback Givers. Lombardo, M. M. (2009) www.microsoft.com/education/competencies/allcompetencies.mspx

Successful Manager's Handbook: Develop Yourself Coach Others. Davis, B. L. (2005)

You're NOT the Person I Hired! A CEO's Survival Guide to Hiring Top Talent. Boydell, J., Deutsch, B., Remillard, B. (2005)

Call Scoring 101 – The 7 Non-Negotiables

The purpose of this document is to give you an outline of what you should listen to as it pertains to the 7 Non- Negotiables. Listening and scoring calls is the single most important thing you can do to increase revenue in the shortest amount of time. We suggest scoring a minimum of 10 Hot Lead and/or Not Booked calls per agent per month, or 5 calls per coaching session. The Reservation Sales Call Scoring Module contains the REVINATE 7 Non- Negotiables template, but can be customized to use a template of your own creation.

Non-Negotiable	What to Listen For	Value
Utilizes Proper Greeting and Gathers Contact Information	* Thanks the caller for calling (company). * Asks for name of the caller. * Offers their name. * Asks for call back number.	5 Points
Asks Effective Open Ended Qualifying Questions and uses Interactive Dialogue with Caller	* Asks qualifying questions to identify their guest's needs. * Gives personal tailored recommendations based on the caller's answers. * Uses information provided to build rapport and sell the experience.	10 Points
Effectively Personalizes and Engages in Conversation with the Guest	* Uses callers name conversationally, but discreetly throughout the call * Uses information learned through discovery to build rapport with caller. * Shares a bit of self, when relevant.	5 Points
Gives Tailored Recommendations to the Guest's Desired Experience	* Uses information gathered through qualifying questions to make tailored recommendations for the guests' specific needs. * Exhibits a genuine sense of interest and concern for the caller's satisfaction. * Leads the conversation and demonstrates the ability to anticipate needs.	10 Points
Maintains a Positive Tone using Professional, Confident and Courteous Language	* Uses a polite pace that is appropriate, clear, calm and easily understood by the caller. * Maintains an enthusiastic, yet gracious tone. * Drives entire call with confidence and pride.	5 Points
Asks for the Reservation	* Specifically asked for the reservation (Holds do not count). * Asks for the reservation after effectively selling the tailored experience to the guest. * Attempted to Overcome Objections	10 Points
Proper Call Closing	* Politely closes with sincere appreciation. * If not booked, offers follow up email. * Re-brands business using name. * Gives anticipatory remarks.	5 Points

How-to Set Up and Track Coaching Sessions

The Reservation Sales 'Coaching Sessions' page allows the coach to review previous coaching period's goals and progress and enter new coaching period goals (Reservation Sales -> Tracking). The 'My Coaching Goals' page allows agents to view goals and progress for the current coaching period or for the previous coaching period (Reservation Sales -> Tracking). Both of these tools work together to provide greater clarity for coaching sessions, goal setting, scored calls, and conversion rates. Please review REVINATE Best Practices regarding scoring and coaching for additional recommendations (Reservation Sales > Help/Education > Best Practices).

Your First Coaching Session

When you start using the coaching feature in The Reservation Sales Suite, the first time you select an agent and a template, the system will provide the following message: "Please select the start date for the coaching period you are about to create." It is important to select the date when you had your last coaching session. If you don't know the date of your last coaching session, you'll want to pick the day before the actual day of the first call scored. For example, if you want to use calls scored in the month of July, then pick the date June 30. Follow these steps:

1. In The Reservation Sales Suite go to Tracking > Coaching Sessions
2. Select **Agent Name**
3. Select the **Scoring Template** that you used to coach the agent.
4. Select **New Session**.
5. Because this is your first coaching session you will not see previous goals.
6. Enter goals for each of the scoring criteria.
7. Enter your coaching notes. If you do not use ***Keep, Stop, Start*** methodology you can highlight this text and delete it.
8. Select **Save Changes** button.

Preparing for Coaching Sessions

Score at least 5 calls per agent. Create and save coaching sessions only after you've completed scoring all calls for the session. The 5 calls will show on the Coaching Sessions page since they occurred between your previous coaching session and the upcoming session.

1. Identify 2 calls to focus on for the coaching session.
2. Have the agent listen and score the 2 selected calls prior to your session, using the Agent Self Scoring Template located in the Knowledge Base (Reservation Sales -> Knowledge Base -> Coaching).

3. Now prepare for your coaching session in The Reservation Sales Suite:
    a. Go to Tracking > Coaching Sessions
    b. Select **Agent Name**.
    c. Select the **Scoring Template**. If you only use one scoring template it will default automatically.
       If you use multiple templates, select the appropriate scoring template
    d. Select the **New Session** button.
    e. Optionally enter scoring goals. You can enter goals before the coaching session or during the actual coaching session with the agent.
    f. Enter **New Coaching Notes** using ***Keep, Stop, Start*** methodology and other comments for the upcoming coaching session.
    g. Select **Save Changes** button.

Updating Coaching Sessions

We recommend that you coach your agent using your computer and the Reservation Sales Suite Coaching Sessions page. If this is not feasible you can coach without The Reservation Sales Suite and then update the session at a later date. To update the coaching session for your agent prior to, during, or after the coaching session:

1. Go to Tracking > Coaching Sessions
2. Select **Agent Name**.
3. Select the **Scoring Template**.
4. Select the **Current Session** button.
5. Optionally enter or modify scoring goals.
6. Update **Coaching Notes**.
7. Select **Save Changes** button.

Viewing Coaching Sessions

To view or modify prior coaching sessions:

1. Go to Tracking > Coaching Sessions
2. Select **Agent Name**.
3. Select the **Scoring Template**.
4. Select **Other Sessions**.
5. Select the coaching period that you want to view or edit.
6. Optionally enter or modify scoring goals.
7. Optionally update **Coaching Notes**.
8. Select **Save Changes** or **Cancel**.

Scoring with Multiple Templates

First determine the focus of your coaching session. For example, is the focus on using the REVINATE 7 Non- Negotiables or your customized call flow, sales techniques, or general customer service? Once you have chosen a focus, choose a template, and score a minimum of 5 calls per agent using this template. Note that the KPI Report can only show results from one associated call scoring template. To ensure accurate data reporting, you may want to restrict any changes to your default scoring template to the 1st of the month.

My Coaching Sessions

This feature allows agents, and administrators that are coached, to view their coaching progress for the current or previous coaching period. To view your current or previous coaching goals, follow the steps below:

1. Tracking > My Coaching Goals
2. Select the **Scoring Template** used during your coaching session.
3. Select **Current Goals** to view the current goals you're working on. Select **Previous Goals** to view the goals set in your last coaching period. Select **Other Goals** to view previous coaching periods.

Manual Call Scoring Template

Non-Negotiable and Description	Value	YES	NO	N/A
Utilized Proper Greeting and Gathered Contact Information Thanks the caller for calling (company) * Asks for name of the caller *Offers their name * Asks for call back number	5	☐	☐	☐
Asks Effective Open Ended Qualifying Questions and Uses Interactive Dialogue with Caller Asks qualifying questions to identify their guest's needs * Gives personal tailored recommendations based on the caller's answers * Uses information provided to build rapport and sell the experience.	10	☐	☐	☐
Effectively Personalizes and Engages in Conversation Uses callers name conversationally, but discreetly throughout the call *Uses information learned through discovery to build rapport with caller * Shares a bit of self, when relevant.	5	☐	☐	☐
Gives Tailored Recommendations to the Guest's Desired Experience Uses information gathered through qualifying questions to maketailored recommendations for the guests' specific needs * Exhibits a genuine sense of interest and concern for the caller's satisfaction *Leads the conversation and demonstrates the ability to anticipate needs.	10	☐	☐	☐
Maintains a Positive Tone Using Professional Courteous Language Uses a polite pace that is appropriate, clear, calm and easily understood by the caller * Maintains an enthusiastic, yet gracious tone *Drives entire call with confidence and pride	5	☐	☐	☐
Asks for the Reservation Specifically asked for the sale (HOLDS do not count) * Asks for the reservation after effectively selling the tailored experience to the guest * Attempted to Overcome Objections	10	☐	☐	☐
Proper Call Closing Politely closes with sincere appreciation * If not booked, offers follow up email * Re-brands business using name * Gives anticipatory remarks.	5	☐	☐	☐

Coaching Narrative: Use this area to provide additional feedbackSample Coaching Skit

Coach: Jessica, thanks for meeting with me. Let's review your call scores from last month. Well, it looks like you are doing a great job of being friendly and courteous. How about we listen to acall and see how this call matches up with where the call scoring says you need some additional training?

(NEED CALLS of Jessica's)

What do you hear in this call that you are happy with?

Jessica: I asked him to hold a room.

Coach: What else did you learn about him?

Jessica: I got his dates and how many people

were coming. Coach: Great! Let's talk about

what else you heard from him.

1. He wanted to know how far it was from the Mt. That would make me think he wanted toski.
2. You did get his dates and how many were coming.
3. You heard he wanted a hot tub.
4. You heard that $209.00 was not out of his budget.
5. There were two couples.

All great information! What we need to do is to get this same information BEFORE we quote price on any product.

This is interactively listening to the caller's request. As the guest gives you information, you need to ask more questions. This will give you a clear picture of what they are looking for. I would also suggest asking the guests name and using it throughout the call. This will help build your relationship with the potential guest.

How could you do this?

Jessica: I could ask more questions at the beginning of the call.

Coach: Exactly! Let’s talk about some of the questions you could ask him as part of your “qualifying process”. Do you have some suggestions?

Jessica: I could ask if they had stayed with us before. If he had not, I could ask if he had been to Bend before and where he stayed. That would give me an idea of what he would want to spend or expect.

Coach: Great, anything else?

Jessica: I could ask if they have a budget in mind.

Coach: Exactly!

Jessica: Also, because he wanted to know how close we were to the mountain I could have asked him ifhe was going to ski and was interested in Ski packages.

Coach: Ok, so if you knew all of the above information BEFORE you quoted any pricing what would you have told him about?

Jessica: I would have told him about how great the snow has been and that we have some great ski packages. Tell him about how when he stays in our units he can ski for $10.00, which is $46.00 off of the daily lift ticket. Maybe even mention the complimentary après ski party we have on Saturday when the free shuttle brings them back from a day on the slopes!

Coach: Perfect. Remember, guests are coming to Bend and our resort to vacation not stay in a unit!

What else?

Jessica: I would probably have told him about how wonderful the River Ridge Suites were with their own private hot tub on every deck!

Coach: That is exactly right! Guests want your personal r3ecommendation. I used to tell people “If River Ridge is anywhere near your budget – Stay there! They are absolutely fantastic. There isnot a nicer place to stay in all of Central Oregon, let alone Bend. I would also suggest you create some urgency with him.
Something like, “Wow, with all of this snow, our availability is getting limited. Can I book one of these River Ridge Suite for you?”

Jessica: That sounds so easy.

Coach: So for the next week I would like you to work on the following:

Ask more questions about their stay. You can use the Q & A sheet to create questions in your own words to use as a guideline. Give a personal recommendation based on the information the caller has given you.

And, I just need you to slow down and get more information upfront BEFORE you start talking about pricing. You can also create urgency by using phrases such as “limited availability”

Agent Resources

Q & A Tool

This tool is designed to help you ask the RIGHT OPEN-ENDED and DISCOVERY QUESTIONS when you are talking to a lead so you can sell to the NEED and NOT FEATURE-FLOOD, and ASK FOR THE SALE.

GREETING – Ask for Name

VERIFY PHONE#, EMAIL TO SEND RECAP

NEEDS / DATES

DISCOVERY – Reason for Stay

DISCOVERY

PERSONALIZE/RECOMMENDATIONS

DISCOVERY

PERSONALIZE/RECOMMENDATIONS

ASK FOR SALE

OVERCOME OBJECTIONS

SET UP OB EMAIL AND F/UP CALL

THANK YOU - BRANDING - YOUR NAME

Agent Self-Scoring Template

The Agent Self-Scoring Template is a tool for your reservation agents. It allows them to proactively improve their sales skills by scoring their own calls, identifying opportunities and setting goals based upon your recommended call flow. Self-scoring on a regular basis can also be used along with your scoring and coaching to enhance your sales culture.

For maximum benefits, REVINATE Best Practices recommends that your agents:

1. Score “Not Booked” and “Hot Lead” calls only.
2. Score one “good” call and one “opportunity” call.
3. Set their own goals for areas they want to improve.

Agents should note their conversion rate prior to self-critiquing. If they score themselves and make the changes they identified, they will see an increase in their conversion. When this happens, reward them!

Note: Agent self-scoring is not meant to be a substitute for a manager scoring calls and coaching agents. Suggestions to Managers:

1. **Provide positive feedback to your agents.**
   Self-critique can sometimes take an undesired turn for the worse to the point that your agents no longer hear what they are doing well. Take note of your agents’ goals as they communicate them via the completed forms and be sure to note positive efforts and excellence while acknowledging areas for improvement. Ask them if they need additional resources to help them achieve their goals.
2. **Use self-scoring goals as a discussion topic during group meetings or coaching sessions.**
   Have your agents share their goals with the group? This forum will facilitate brainstorming, team building and enhance your sales culture.
3. **Require agents to fill out self-critique forms prior to coaching sessions.**
   This will give managers some insight as to how agents view their own performance so that you can better calibrate where to begin when setting strategic goals.
4. **Reward agents that utilize self-critique forms to improve their sales skills and achieve theirgoals.** Agents who take the additional steps to improve their performance are employees that you will want to acknowledge publically and privately. This will reinforce their desire to succeed and demonstrate to them that they are valued within your organization.

Agent Self-Scoring Template

Name:________________________Date/Time of Call:____________________

Call Result:____________________Current Conversion Rate (last 30 days): __

____

Non-Negotiable and Description	Value	YES	NO	N/A
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Asks Effective Open Ended Qualifying Questions and Uses Interactive Dialogue with Caller Asks qualifying questions to identify their guest's needs * Gives personal tailored recommendations based on the caller's answers * Uses information provided to build rapport and sell the experience.	10	☐	☐	☐
Effectively Personalizes and Engages in Conversation with The Guest Uses callers name conversationally, but discreetly throughout the call *Uses information learned through discovery to build rapport with caller * Shares a bit of self, when relevant.	5	☐	☐	☐
Gives Tailored Recommendations to the Guest's Desired Experience Uses information gathered through qualifying questions to maketailored recommendations for the guests' specific needs * Exhibits a genuine sense of interest and concern for the caller's satisfaction *Leads the conversation and demonstrates the ability to anticipate needs.	10	☐	☐	☐
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Asks for the Reservation Specifically asked for the sale (HOLDS do not count) * Asks for the reservation after effectively selling the tailored experience to the guest * Attempted to Overcome Objections	10	☐	☐	☐
Proper Call Closing Politely closes with sincere appreciation * If not booked, offers follow up email * Re-brands business using name * Gives anticipatory remarks.	5	☐	☐	☐

Agent Self-Score Review

1. Which of the non-negotiables did you do well and why?
2. Which of the non-negotiables can you improve on? How would you improve?
3. I was able to identify the guest's primary needs and make personal recommendations for those needs. Yes/No
4. The guest's primary need was:
5. My personalized recommendations were:
6. I earned the right to ask for the reservation. Yes/No Why?
7. I asked for the reservation. Yes/No
8. List one or two things you will work on to improve the quality of future reservation calls:

RezForce LUX Call Flow

Call Opening: *Branding the client and attempting to get phone number and email address*

Thank you for calling______. This is Courtney speaking, and with whom do I have the pleasure of speaking with today?

And, in the event that our call becomes disconnected, may I have your telephone number please? Thank you Mr./Mrs. .

Thank you, and in the event I need to send you a confirmation for your reservation, what is a good email address?

HOW MAY I ASSIST YOU TODAY MR./MRS. ?

It would be my pleasure to assist you with that

today Mr./Mrs.________________________________What were the dates of stay you

are interested in?

How many people are you looking to accommodate? (if **children** - May I ask the

ages of your children?) Have you had the pleasure of staying with us at

before?

(NO) Let me be the first to welcome you.

(Yes) Let me be the first to welcome you back, Mr./Mrs._. And what is bringing you back for your stay with us this time?

(If special occasion) Thank you, we are honored to be considered for your special occasion.

What is bringing you to the resort?

Do you have any specific activities you or party would like to enjoy while here?

Are there any particular room accommodations you prefer while staying with us?

Are there any specific room types or bedding configurations you will be requiring while staying with us?

Rates / Availability: Offer a visually descriptive room description before offering the rate for the available room types.

- I am showing limited availability; I can offer a__room with a
- I do have the perfect room available. It has breathtaking views from the private balcony, a kitchenette...
- I have 2 options that would work perfect for you; ROOM-Description/Up-Graded ROOM- Description then PRICE/PRICE.

No Availability: Ask more questions before advising the caller, to better assist with a solution.

- Unfortunately, I am not showing any availability, are you flexible with your dates of stay at all?
- I apologize for the inconvenience, what I can do is put a request in to be on a waitlist. Should space open up and we are able to accommodate you, how would you like to be notified?

ASKING for the Reservation

Would you like to reserve either of these rooms I've offered?

- I would be happy to confirm this reservation for you with the deposit of… *TERMS*
- Do either of these options sound like something you would like to reserve today?
- Would you like to move forward with this reservation?
- I could only guarantee this room/rate, if you are able to confirm the reservation at this time?

RECAP the Reservation: Dates/Room/Rate/Incidental Charge if applicable. CONFIRMATION

TERMS: *Cancellation Policy * Check Forms of Payment * Check-in/Out Time *

Check-in time is_____what time should we

expect your arrival? Will you need any

assistance with transportation or directions?

CONFIRMATION # M r . /Mrs._If you are ready, I'd be happy to provide you with your confirmation number, or if you'd prefer, I can provide it to you via email, mail or fax.

Closing: Branding / Anticipatory Remarks

Mr./Mrs.____, Is there anything else I may assist you with today?

Thank you for calling__________. We look forward to your arrival/hearing from you.

RezForce Hotel/Resort Call Flow

Thank you for calling______. This is______speaking, and may I get your first and last name please?

And, in the event that our call becomes disconnected, may I have your telephone number please? Thank you Mr./Mrs.____.

Thank you, and in the event I need to send you a confirmation for your reservation, what is a good email address?

What were the dates of stay you are interested in?

How many people are you looking to accommodate? (if children, May I ask the

ages of your children?) Have you had the pleasure of staying with us at

before?

(NO) Let me be the first to welcome you.

(Yes)Let me be the first to welcome you back, Mr./Mrs._. And what is bringing you back for your stay with us this time?

(If special occasion) Thank you, we are honored to be considered for your special occasion.

What is bringing you to the resort?

Do you have any specific activities you or your party would like to enjoy while here?

Are there any particular room accommodations or amenities you prefer while staying with us?

Was there a particular price range you were hoping to stay with in?

Tailor the Recommendation based on what you learned – 1-2

options/properties ASKING for the Reservation

Would you like to go ahead and take this off the market?

- I would be happy to confirm this reservation for you with the deposit of… *Booking Policies*
- Do either of these options sound like something you would like to reserve today?
- Would you like to move forward with this reservation?
- I could only guarantee this room/rate, if you are able to confirm the reservation at this time?

Go Over Cancellation and Payment Policy

RECAP the Reservation: Dates/Room/Rate/Incidental

Charge if applicable. Check-in time is_what time

should we expect your arrival?

Will you need any assistance with transportation or directions?

CONFIRMATION # Mr./Mrs.__If you are ready, I'd be happy to provide you with your confirmation number, or if you'd prefer, I can provide it to you via email, mail or fax.

Closing: Branding / Anticipatory Remarks:

Mr./Mrs.____, Is there anything else I may assist you with today?

Thank you for calling__________. We look forward to your arrival/hearing from you.

Introduction to Call Scoring and Coaching - REVINATE University eLearning course

This interactive course introduces the concept of call scoring and coaching to reservation agents with an emphasis on addressing not only the tools and resources available within The Reservation Sales Suite, but the "what's in it for me?" question. You must have a REVINATE University login and password to access this course.

Please contact Education@REVINATE.com to request logins.