

Coaching for Results

INTUIT CONTACT CENTERS IMPROVE THE EMPLOYEE EXPERIENCE — AND THE BOTTOM LINE — BY REINVENTING THEIR APPROACH TO COACHING

Founded in 1983, Intuit Inc. is today one of the leading providers of financial management software to businesses, consumers, and accounting professionals. Among its best-known products are Quicken® and TurboTax®, applications that help users manage their finances and simplify the preparation of their tax returns.

SITUATION

In mid-2002, an eight-person internal task force was charged with examining coaching and performance management practices at financial software giant Intuit Inc. To assess the role these practices played in the employee experience, the task force reviewed the results of "Voice of the Employee" (VOE) surveys, which Intuit conducts periodically, and held focus groups.

The task force reported that employees were dissatisfied with the quality and quantity of coaching they received, and noted that managers were frustrated by the absence of the tools — and the incentive — they needed to coach effectively.

intuit is
headquartered
in Mountain View,
California, and is
represented in 13
states, Canada, and
the United Kingdom
by nearly 7,000
employees. The
company's annual
revenue exceeded
\$1.6 billion in its
2003 fiscal year.




Renee Starnes, Senior Manager of Contact Center Development for Intuit's four customer service centers and a member of the task force, partnered with her colleagues to select a pilot coaching skills program.

With help from Interaction Associates, she launched what has become one of the most successful human resources initiatives at the Intuit Contact Centers.

SOLUTION

After receiving approval to bring Interaction Associates' *Essentials of Coaching for Managers* workshop to Intuit Contact Centers in Plano, Texas, and Fredericksburg, Virginia, Renee and IA Account Manager Bell Zeidman developed a pilot program.

 **Interaction Associates** IA is a 40-year firm specializing in the development of Facilitative Leaders. We equip these leaders to solve complex problems and achieve extra ordinary results by leveraging the power of people working together. Since 1969, we have partnered with global leaders across all industries, and many of the Fortune 100, to transform the way people lead, and are led, at every level in an organization.

case study

Feedback from participants in the interactive workshop — which uses video simulations, practice sessions, and group discussions to maximize the effectiveness of coaching relationships — was overwhelmingly positive. The successful pilot set the stage to roll out the program in the other sites.

Within 12 months of bringing *Essentials of Coaching for Managers* to the Intuit Contact Centers, more than 300 managers had been trained, and several of Renee's colleagues had become licensed to lead the workshop.

Renee also had the opportunity to test the global applicability of the program. "One of our Contact Centers is managed by an outsourcing firm in India. While planning our training sessions for this location, we wondered how effectively the workshop would translate to another culture. Seeing how readily this group of managers embraced the *Essentials of Coaching for Managers* concepts was amazing."

RETURN ON INVOLVEMENT

For Renee, the results of recent VOE surveys confirm the efficacy of the program. "When Contact Center managers are coaching a lot, their employee satisfaction scores are high. But during our peak season, when managers have less time for coaching, the scores drop. Since managers' coaching skills are now assessed as part of their year-end performance evaluation, there's a tremendous incentive to make coaching a top priority."

Renee concludes, "I love the *Essentials of Coaching for Managers* program's focus on coaching as a relationship-based activity. In most coaching models, the manager is responsible for leading the coaching activities. But with *Essentials of Coaching for Managers*, the manager and the employee are equal partners. Both parties prepare for coaching meetings because both are responsible for the results."