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QUALITY INTELLIGENCE. COMPLIANCE. PERFORMANCE.

QUALITY
COMPLIANCE
COACHING
PERFORMANCE

Free QA Coaching Checklist

A practical guide to help managers and QA professionals prepare for effective, focused coaching conversations.

1 Review the Evaluation

BE PREPARED.
BE SPECIFIC.
DRIVE IMPROVEMENT

- ❑ Review the QA evaluation results.
- ❑ Identify the specific behavior or performance gap.
- ❑ Confirm the applicable policy, process, or expectation.
- ❑ Note any compliance, customer-impact, or risk concerns.
- ❑ Gather specific examples from the interaction.

2 Identify the Root Cause

UNDERSTAND
THE WHY.

- ❑ Skill gap
- ❑ Knowledge gap
- ❑ Behavior issue
- ❑ Process issue
- ❑ Communication issue
- ❑ Other:_____

3 Prepare the Coaching Objective

SET A CLEAR
FOCUS.

What needs to improve?

_____

What should the employee do differently?

_____

What result should the coaching achieve?

_____



Coaching Tip:
Focus on the behavior, the expectation, and the next action– not just the score.

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Coaching Conversation & Follow-Up

Turning feedback into growth, one conversation at a time.

4 During the Conversation

LISTEN.
GUIDE.
BUILD SOLUTIONS.

- ❑ Explain the purpose of the coaching discussion.
- ❑ Review the specific example(s).
- ❑ Ask the employee for their perspective.
- ❑ Clarify the expected behavior.
- ❑ Explain why the expectation matters.
- ❑ Discuss the impact on quality, compliance, or customer experience.
- ❑ Agree on the corrective action or next step.
- ❑ Confirm employee understanding.

5 Follow-Up & Documentation

TRACK PROGRESS.
REINFORCE SUCCESS.

- ❑ Document the coaching discussion.
- ❑ Record agreed action items.
- ❑ Set a follow-up date.
- ❑ Monitor for improvement.
- ❑ Recognize improvement when demonstrated.
- ❑ Escalate repeated issues when appropriate.



Follow-Up Date: _____

Manager / Coach: _____

Employee: _____

Effective coaching creates clarity, accountability, and a clear path to improvement.

Take Your QA Coaching Program Further
CertiCall Compliance LLC helps contact centers strengthen quality monitoring and coaching.
Explore our consulting services: certicallcompliance.com