

Coaching Universe

The centralized coaching and employee development platform inside QEval, standardizing how coaching is planned, tracked, reviewed, and completed across every role.

KEY CAPABILITIES

- Disciplinary Coaching
- Bulk Coaching Assignment
- E-Signature Workflow*
- Coaching Status Tracking
- HR/Admin Approval Workflow

**Role-based limitations covered later in this deck.*

Managers · Supervisors · Administrators · Employees

Deck objective: increase awareness · improve adoption · timely review & completion

Coaching Universe: Standardizing Performance Coaching Across Operations

Coaching Universe is a centralized coaching management solution that lets teams plan, assign, track, review, and complete coaching activities through a structured, transparent workflow, giving supervisors, managers, administrators, and agents one platform for coaching, progress, and notifications.

WHY THIS TRAINING MATTERS

This training demonstrates how Coaching Universe enables Managers, Supervisors, Administrators, and Employees to work together through a structured coaching framework that improves consistency, visibility, accountability, and employee performance.

WHAT YOU'LL LEARN

- Understand the purpose and business value of Coaching Universe
- Configure and manage coaching effectively
- Track coaching progress using notifications and dashboards
- Review coaching statuses and complete follow-up actions on time
- Apply best practices to improve coaching consistency and accountability

WITHOUT A SHARED UNDERSTANDING OF THE TOOL

- No single source of truth for coaching activities
- Coaching sessions may be created but not consistently reviewed or completed
- Inconsistent coaching practices across supervisors and teams
- Overdue coaching and action items can impact compliance and performance visibility

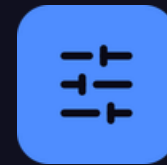
What Is Coaching Universe?

A centralized coaching and employee development platform that standardizes how coaching is planned, assigned, tracked, reviewed, and completed, eliminating manual follow-up through structured workflows, templates, action items, notifications, and approvals across every role.



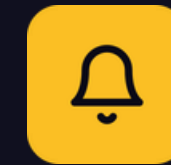
Structured Coaching

Create coaching through a guided workflow or reusable templates for faster, standardized coaching.



Flexible Coaching Setup

Configure coaching using Pillars, Coaching Types, Templates, and Action Items to meet business needs.



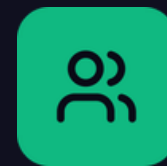
Automated Notifications

Keep all stakeholders informed with reminders, approvals, escalations, and weekly digest notifications.



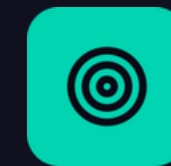
Progress & Visibility

Track coaching status, completion, action items, and overall progress through centralized dashboards.



Role-Based Collaboration

Managers, Supervisors, Administrators, and Employees all have defined roles, supporting every employee, not just agents.



Employee Development

Assign coaching to any employee based on performance, compliance, skills, or business needs.

Architecture: Five Functional Areas

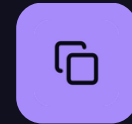


Coaching Configuration

ADMINS

Configure settings, templates, pillars, and coaching types, using system defaults or your own custom setup.

Benefit: Standardizes coaching while allowing flexibility for unique business needs.



Coaching Templates

ADMINS / SUPERVISORS

Create reusable coaching templates to quickly launch consistent coaching sessions.

Benefit: Saves time and reduces repetitive manual effort.

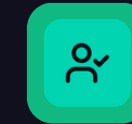


HR Coaching

ADMINS / SUPERVISORS

Create, assign, review, and manage coaching sessions with action items, approvals, and progress tracking.

Benefit: Delivers structured coaching with complete visibility throughout the lifecycle.

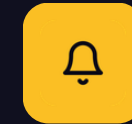


Employee Coaching Workspace

EMPLOYEES

View assigned coaching, acknowledge notifications, complete action items, provide e-signatures, and track progress.

Benefit: Encourages accountability and active participation in development.



Notifications & Approval Engine

ALL ROLES

Receive timely alerts, reminders, approvals, escalations, and weekly digest notifications to stay informed.

Benefit: Ensures no coaching activity is missed and keeps coaching on schedule.

A centralized coaching workflow where configuration drives consistency, coaching manages execution, employees complete assigned actions, and automated notifications keep every stakeholder informed throughout the coaching lifecycle.

Configuration: Configure Pillars, Templates & Coaching Settings

1 Pillars

Organize coaching using three default Pillars (Performance, Compliance, Conduct) or your own custom Pillars, for easier filtering, tracking, and reporting.

2 Coaching Types

Define scenarios under each Pillar using default or custom Coaching Types. Optionally enable HR/Admin Approval to require sign-off.

3 Templates

Create reusable coaching templates with predefined Pillars, Coaching Types, and content for faster, standardized coaching creation.

4 Coaching Settings

Configure reminder schedules, auto-escalation timelines, and notification behavior to ensure timely coaching completion.

5 Admin Users

Assign up to 5 administrators as second-level approvers for coachings that require HR/Admin Approval.

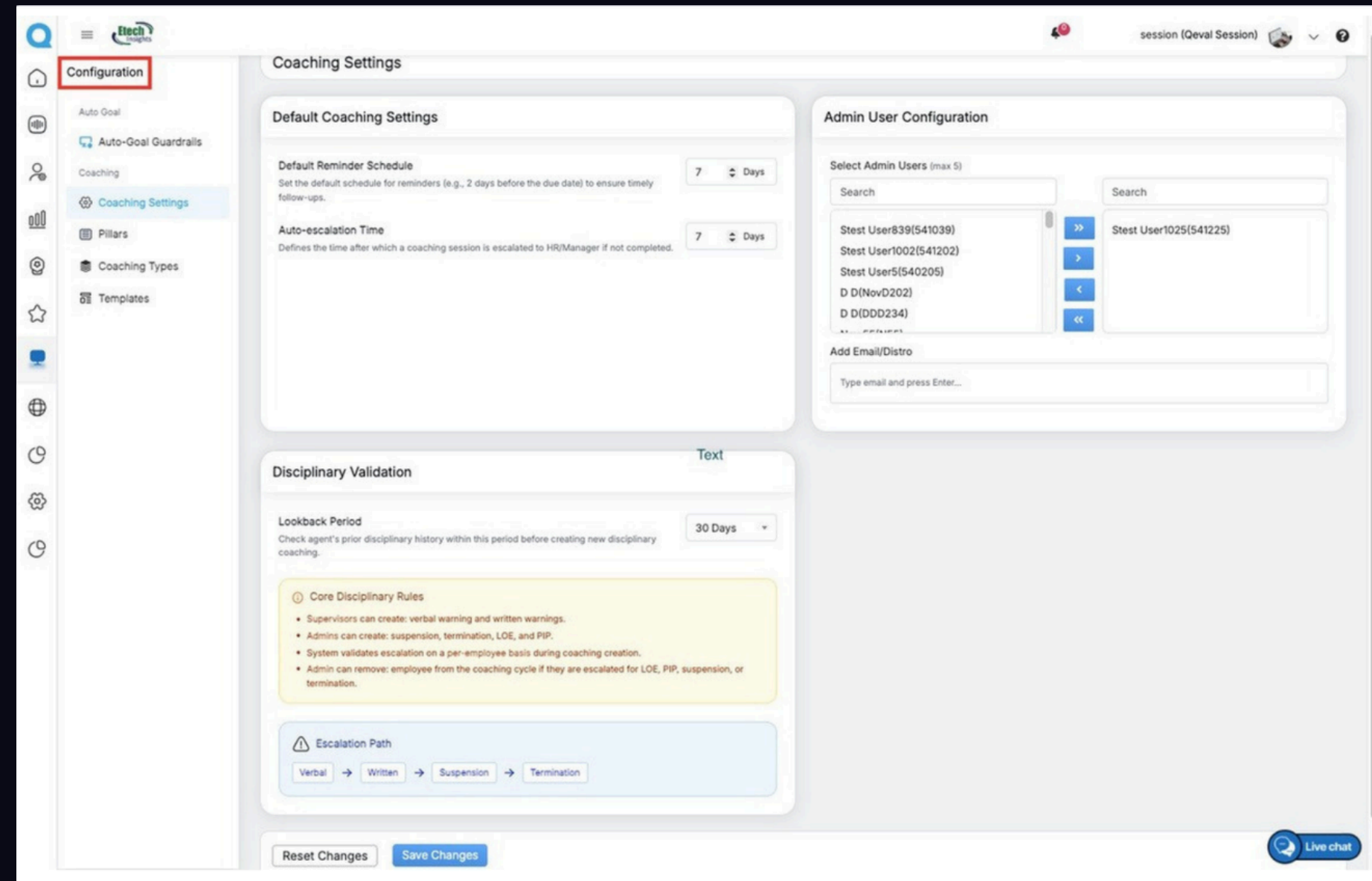
6 Disciplinary Validation

Configure disciplinary rules and lookback periods to automatically identify repeat compliance or disciplinary coaching scenarios.

Best Practice: Configure Pillars, Coaching Types, Templates, and Approval Settings before creating coaching sessions. During coaching creation, use either a Template or Manual Entry, both options are mutually exclusive for a single coaching.

Configuration in Action

Coaching Settings, Admin User Configuration, and Disciplinary Validation, all on one screen.



Configure reminder schedules, auto-escalation timing, disciplinary rules, and the escalation path (Verbal → Written → Suspension → Termination), including LOE and PIP stages, to ensure consistent coaching and compliance management.

Navigating to the Manage Coaching Dashboard

Everything lives under the Coaching menu in the left-hand navigation, landing on the Manage Coaching dashboard: KPI cards up top, every record in the grid below.

IN THE COACHING MENU

Configuration

HR Coaching

- Manage Coaching
- Approvals

My Coaching & Goals

Configuration, HR Coaching (Manage Coaching, Approvals), and My Coaching & Goals all sit under the same Coaching menu group.

Coaching Title	Coaching Pillar	Coaching Type	Created/Modified On	Progress	Assigned To	Action
Research Invest	Performance Coaching	Schedule Adherence Coaching	07/29/2026 07/29/2026	100%	1 Agents	
LOE for Emp	Conduct & Compliance	Letter of Expectation (LOE)	07/29/2026 07/29/2026	Not Started	Pending Approval	
Agent Performance Coaching	Conduct & Compliance	Behaviour Coaching	07/29/2026 07/29/2026	50%	SA TA 2 Agents	
Efficiency	Conduct & Compliance	Verbal Warning	07/29/2026 07/29/2026	Not Started	HL DV 2 Agents	
Soft Skill Coaching One	Performance Coaching	Call Handling Coaching	07/28/2026 07/28/2026	50%	MF SA 2 Agents	
Kevin Karl	Performance Coaching	QA Failure Coaching	07/28/2026 07/28/2026	100%	1 Agents	
Retest Error Validation of Desc Template	Performance Coaching	KPI Deviation Coaching	07/27/2026 07/27/2026	Not Started	1 Agents	

Coaching Title, Pillar, Type, Progress, Assigned To, and Status are all visible at a glance, with Create Coaching, Filters, and Export in the header.

The Create Coaching Wizard, 5 Steps

1

Pillar & Type

Select category & type, or
apply a template

2

Coaching Details

Title, description, assigned
employee(s)

3

Action Items

Trackable tasks employees
must complete

4

Notifications

Email / In-App per event,
per recipient

5

Review & Send

Confirm, then Send &
Review Coaching

Save as Draft is available at every step. Choose either a Template or Manual Entry, the two are mutually exclusive. Notifications and Approvals are covered in detail on the slides that follow.

Action Item Highlights: Define the title, description, due date, completion criteria, and supporting evidence (if required). Employees must complete assigned action items to complete the coaching. A maximum of 10 action items can be added to a single coaching session.

What Are Coaching Universe Notifications?

Configured per event, per recipient role, per channel, with a global “Select All.” Every notification independently supports Email and In-App delivery.

USER ACTION NOTIFICATIONS

Notification	Typical Recipient
New coaching assigned	Employee
Coaching acknowledgment reminder	Employee
Coaching at-risk alert	Supervisor
Coaching rejected / approved	Supervisor, HR
Coaching escalation alert	Sr. Supervisor, HR
Compliance coaching overdue	Supervisor, HR

PROGRESS NOTIFICATIONS

- Coaching completed
- Employee acknowledged coaching
- Coaching approved
- Action item due soon
- Action item overdue

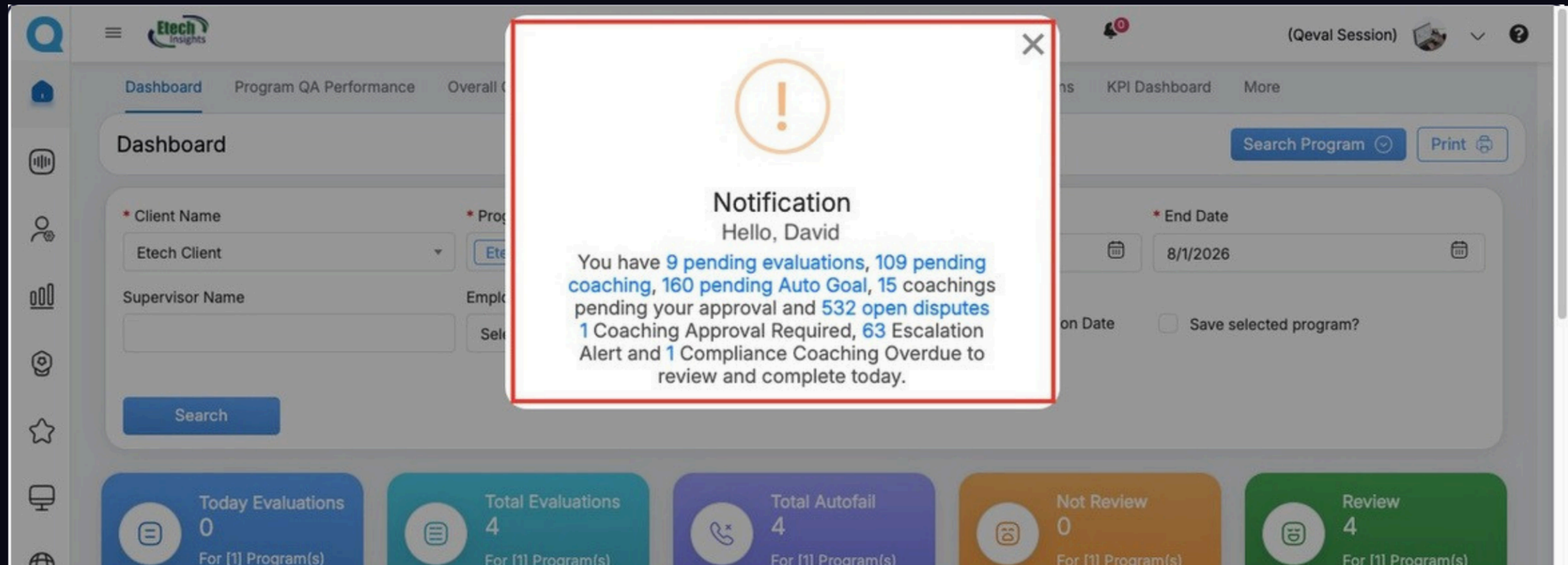


Every event above can be delivered by Email, In-App, or both, configured independently per notification.

Timing is controlled centrally: Default Reminder Schedule drives reminders; Auto-escalation Time drives at-risk / escalation alerts (both set in Coaching Settings).

Notification Pop-up in Action

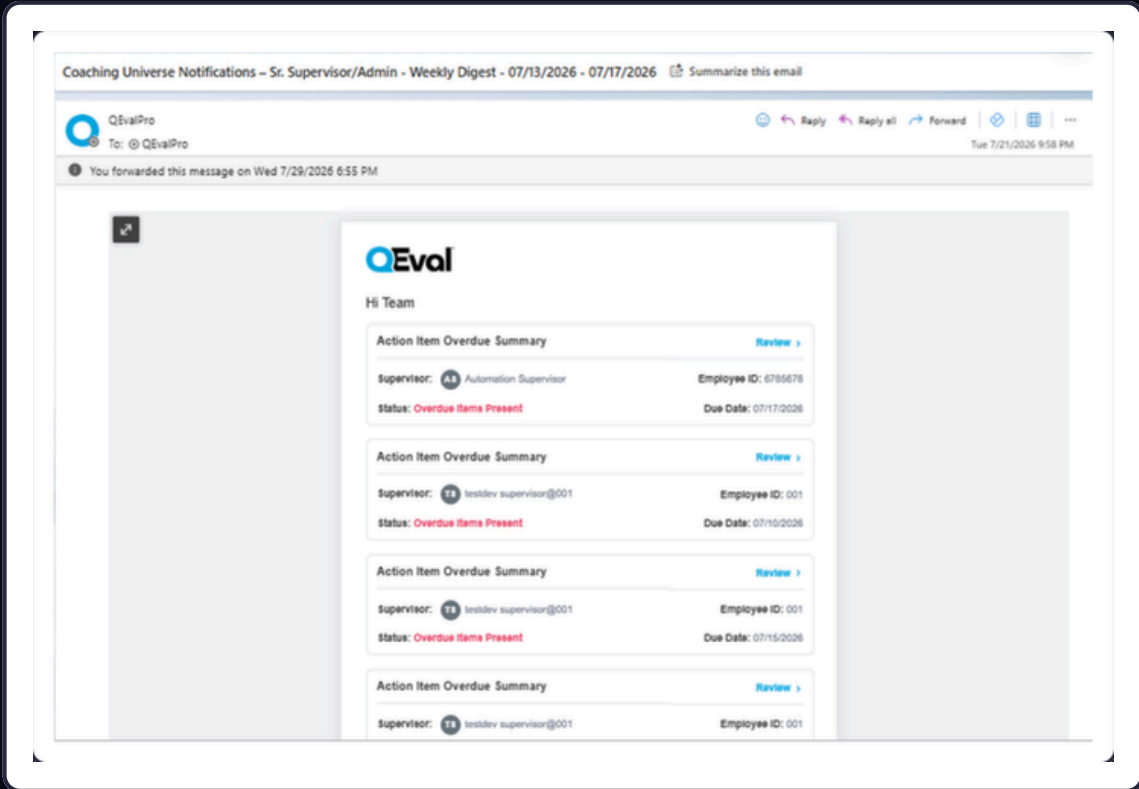
Every user sees this the moment they log in, a live count of everything waiting on them.



Pending coachings, approvals, escalation alerts, and compliance-overdue items are all surfaced by name and count, across Coaching Universe and adjacent modules. Clicking the count redirects you to the corresponding Coaching, Manager Coaching, or Approval page, where you can review and take action on the associated records.

Understanding Weekly Digest Notifications

One consolidated email per week instead of a flood of individual alerts, so supervisors and admins can prioritize follow-ups in one pass.



A real Weekly Digest email: Action Item Overdue Summary entries, one row per supervisor/employee, each with a direct Review link.

TRIGGER

Schedule-based

FREQUENCY

Weekly

DELIVERY

Mon, 9:00 AM CST

PERIOD

Prior Mon–Sun

Supervisor

Team coaching activities, goals, action items, escalations, approvals, weekly summary.

Sr. Supervisor / Admin

Managed team rollups, overdue action items, escalations, coaching summaries.

WHAT'S INCLUDED

- Overdue action items
- Approvals & rejections
- Proposed goals awaiting review
- Guardrail block notifications

- Coaching At-Risk alerts
- Escalations
- Goal milestones reached

Best practice: review every Monday; prioritize overdue and At-Risk items first, then use the action links to jump straight to the record.

Understanding Coaching Statuses

Draft

Wizard started, not submitted

Trigger: Save as Draft

Pending Approval

Submitted; awaiting HR / Sr. Supervisor sign-off

Trigger: Approval-required type

Not Started

Active, but no action item begun yet

Trigger: After approval

In Progress

Some action items complete (e.g. 50%)

Trigger: Employee working

100% Complete

All action items complete

Trigger: Supervisor: Mark Complete

Escalated

Auto-escalation time exceeded

Trigger: System-triggered

Progress percentage (action-item completion) and Status (workflow position) are related but distinct, 100% complete still needs a supervisor to Mark Complete.

Approvals, How Supervisors Should Review & Act

A Coaching Type flagged "Requires HR Approval" routes every session of that type to Pending Approval and into the Approvals queue for HR / Senior Supervisor review.



Notification received

"Coaching approval required" or an at-risk / escalation alert arrives



Review the record

Open the session: Pillar, Type, action items, due dates, evidence



Act

Approve, reject, or follow up, add Supervisor Notes as needed

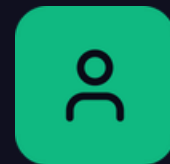


Status updates

Dashboard and History log update in real time for all viewers

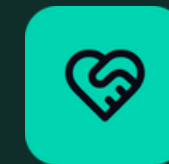
Supervisor best practice: don't wait for escalation. Act on "at-risk" and "due soon" notifications when they first arrive, Auto-escalation Time is the deadline, not the target.

My Coaching & Goals, Employee + Supervisor



Employee View

- Dashboard: Total Sessions, Active Goals, Pending Action Items, Current Score
- Action banner surfaces anything needing immediate attention
- Active / Completed tabs, filterable by Type and Status
- Coaching card: title, description, due date, progress %, status badge
- Tabs: Overview, Action Items, Comments, History
- Acknowledgement and e-signature completed directly from the dashboard

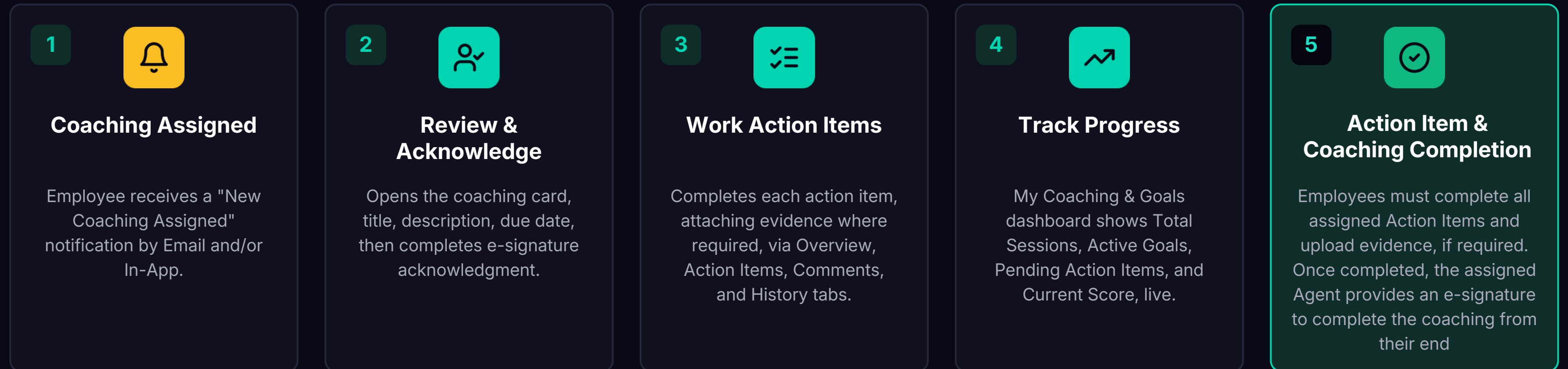


Supervisor Workspace

- Dashboard cards: Pillar, Type, Assigned Employees, Progress
- Employee list with search; per-employee tabs
- Overview: Assigned On, Days Remaining, Performance Progress
- Private Supervisor Notes, visible only to Supervisor & HR
- Add Follow-up to create a linked, subsequent coaching action
- Mark Complete closes out the session once criteria are met

Complete Employee View: My Coaching & Goals Flow

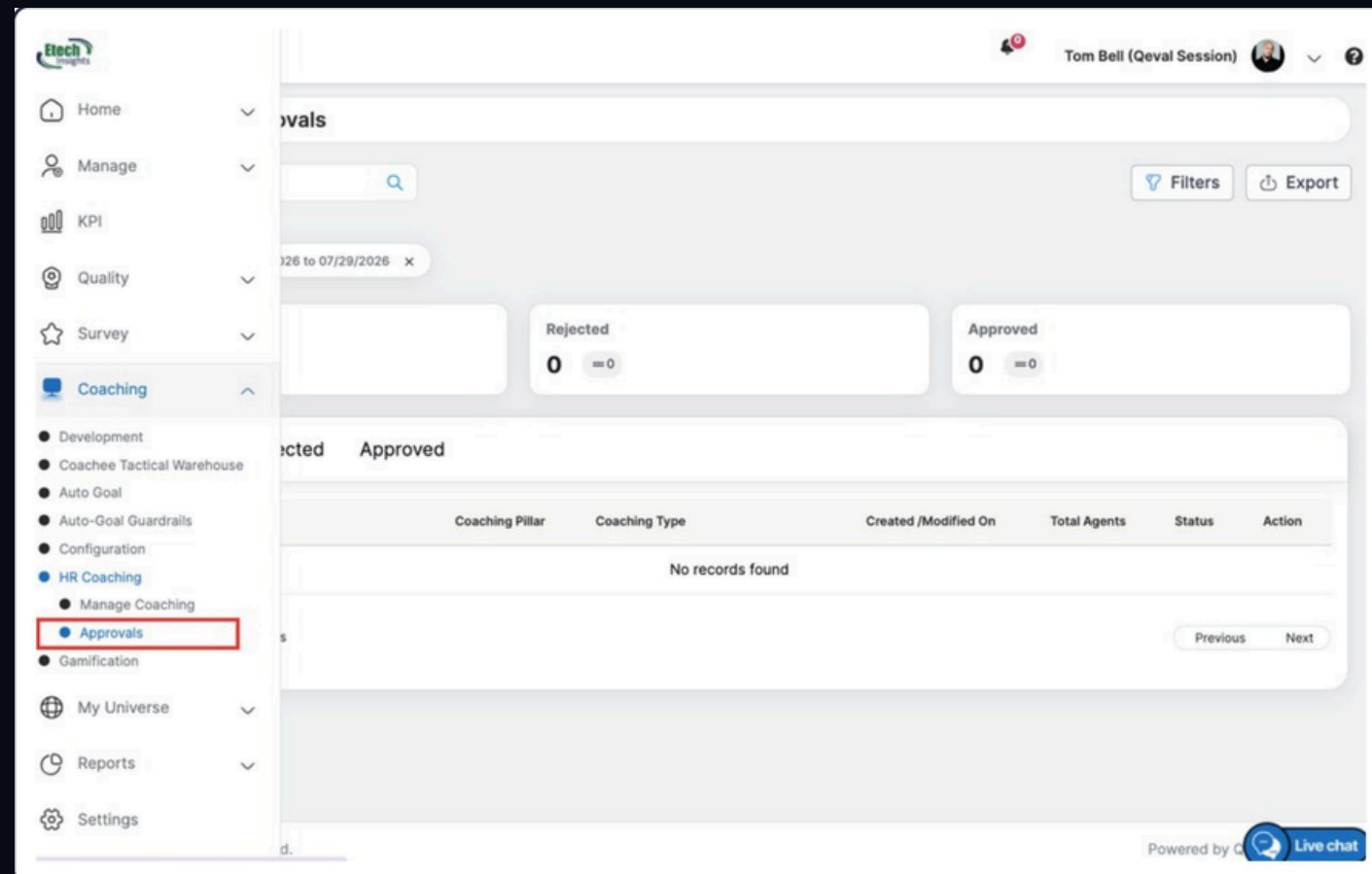
From the moment coaching is assigned to the moment it closes, here is what the employee experiences end to end.



Note: If an action item becomes overdue, the employee will not be able to complete the coaching. Additionally, the e-signature coaching closure workflow is currently available only for the Agent role and is planned to be extended to other roles in upcoming phases.

HR Coaching Approvals: Inside the Dashboard

A dedicated dashboard where HR/Admin reviews every coaching request that requires organizational, compliance, or disciplinary sign-off before it goes live.



Navigation: Coaching Universe → HR/Admin → Coaching Approvals. Pending, Rejected, and Approved tabs each carry a live count.

Pending

Approve

- Open Pending tab
- Locate the request
- Click Action → Review
- Select Approve, submit

Moves to Approved; supervisor is notified.

Rejected

Reject

- Open the request
- Review submitted details
- Select Reject
- Add comments, submit

Moves to Rejected; supervisor can correct & resubmit.

Approved

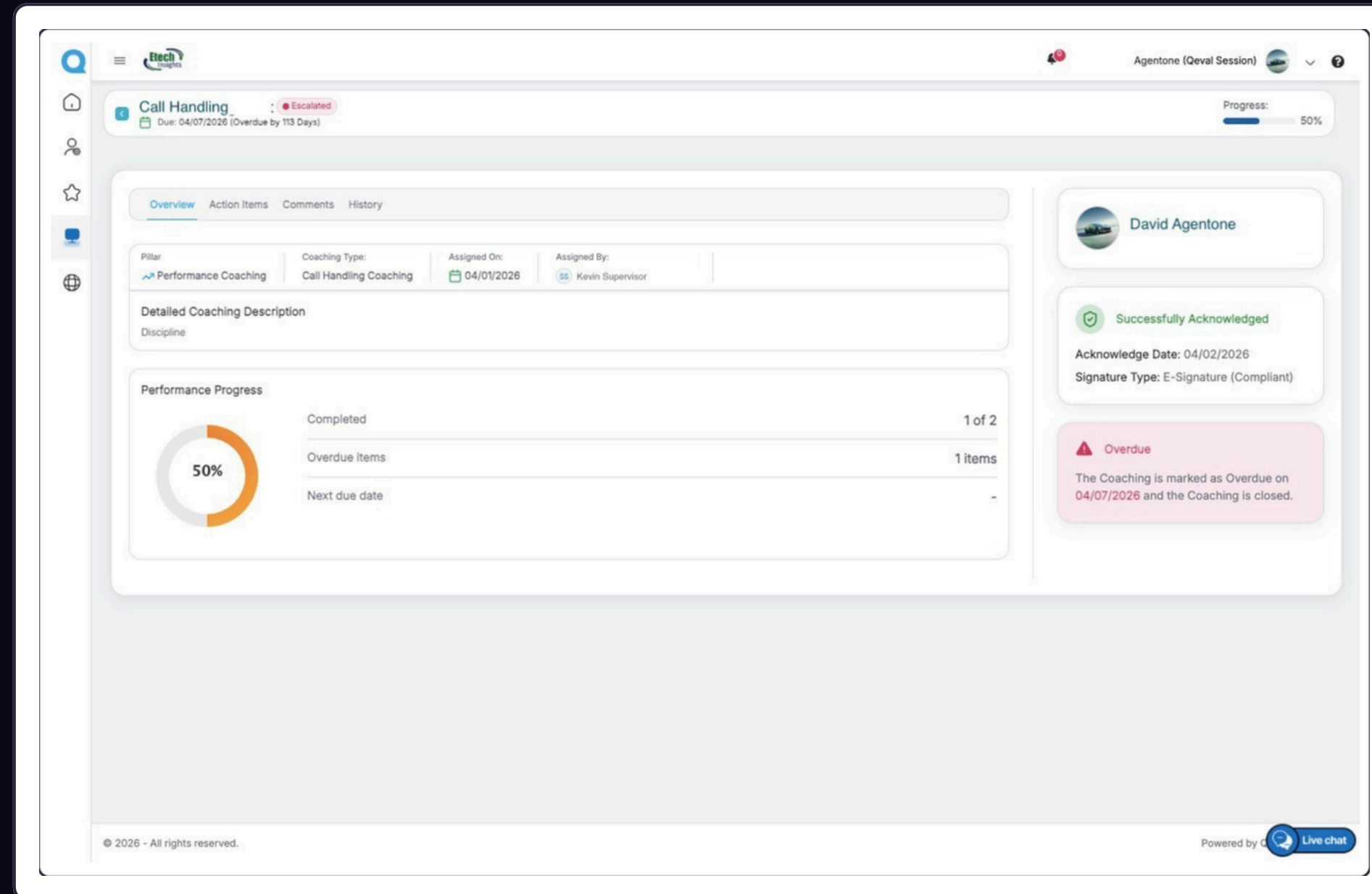
NOTIFICATIONS

HR receives: Approval Required, Escalation Alert, Compliance Overdue

Supervisor receives: Coaching Approved, Coaching Rejected

What an Overdue Coaching Looks Like to an Employee

A real “Call Handling” coaching record, overdue by 113 days.



A coaching remains in Overdue status until all assigned action items are completed, even if it has been acknowledged and electronically signed

Common Use Cases & Examples

Use Case	Pillar / Type	What It Looks Like
Schedule adherence coaching	Performance / Schedule Adherence	An employee shows repeated attendance or schedule-adherence gaps flagged on the KPI dashboard; a supervisor creates a Performance coaching session with action items to correct the pattern.
Letter of Expectation (LOE)	Conduct & Compliance / LOE	A formal document issued when an employee's conduct requires documented expectations going forward; routed for HR/Admin Approval before it goes live.
Behaviour coaching	Conduct & Compliance / Behaviour	Addresses a specific conduct concern, e.g., a policy violation or interpersonal issue, identified during a quality review, with defined action items for correction.
Verbal warning	Conduct & Compliance / Verbal Warning	First step on the disciplinary escalation path (Verbal → Written → Suspension → Termination); documents a verbal conversation about a compliance issue.
Call handling coaching	Performance / Call Handling	Triggered by low QA scores or specific call-handling errors found during evaluation; focuses on skill-building action items tied to call quality.
QA failure coaching	Performance / QA Failure	Created when an evaluation results in an Autofail or below-threshold QA score, requiring the employee to complete corrective action items.
KPI deviation coaching	Performance / KPI Deviation	Assigned when an employee's KPI performance falls outside the acceptable range for a sustained period, prompting a structured improvement plan.

Why It's Worth the Five Minutes



Governance & Compliance

HR approval gate + disciplinary escalation path keep sensitive coaching auditable.



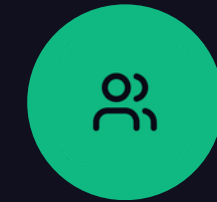
Real-Time Visibility

KPI cards and progress percentages replace manual status chasing.



Nothing Falls Through

Automated reminders and escalations remove reliance on memory.



Employee Ownership

Employees see and act on their own development in real time.

QUICK ROLE REFERENCE

Supervisor

Create, notify, monitor, follow up, Mark Complete

Administrator

Configure Pillars, Types, Templates, Settings, Admin access

HR / Sr. Supervisor

Approve/reject, act on escalations

Employee

Acknowledge, complete action items, e-sign

Questions? Reach out to your Coaching Universe administrator or the Operations enablement team.

Thank You

Your commitment to adopting Coaching Universe will help build a more structured, transparent, and impactful coaching culture across the organization.

Together, we can strengthen coaching effectiveness, drive operational excellence, and empower continuous employee growth and development.

Thank You!