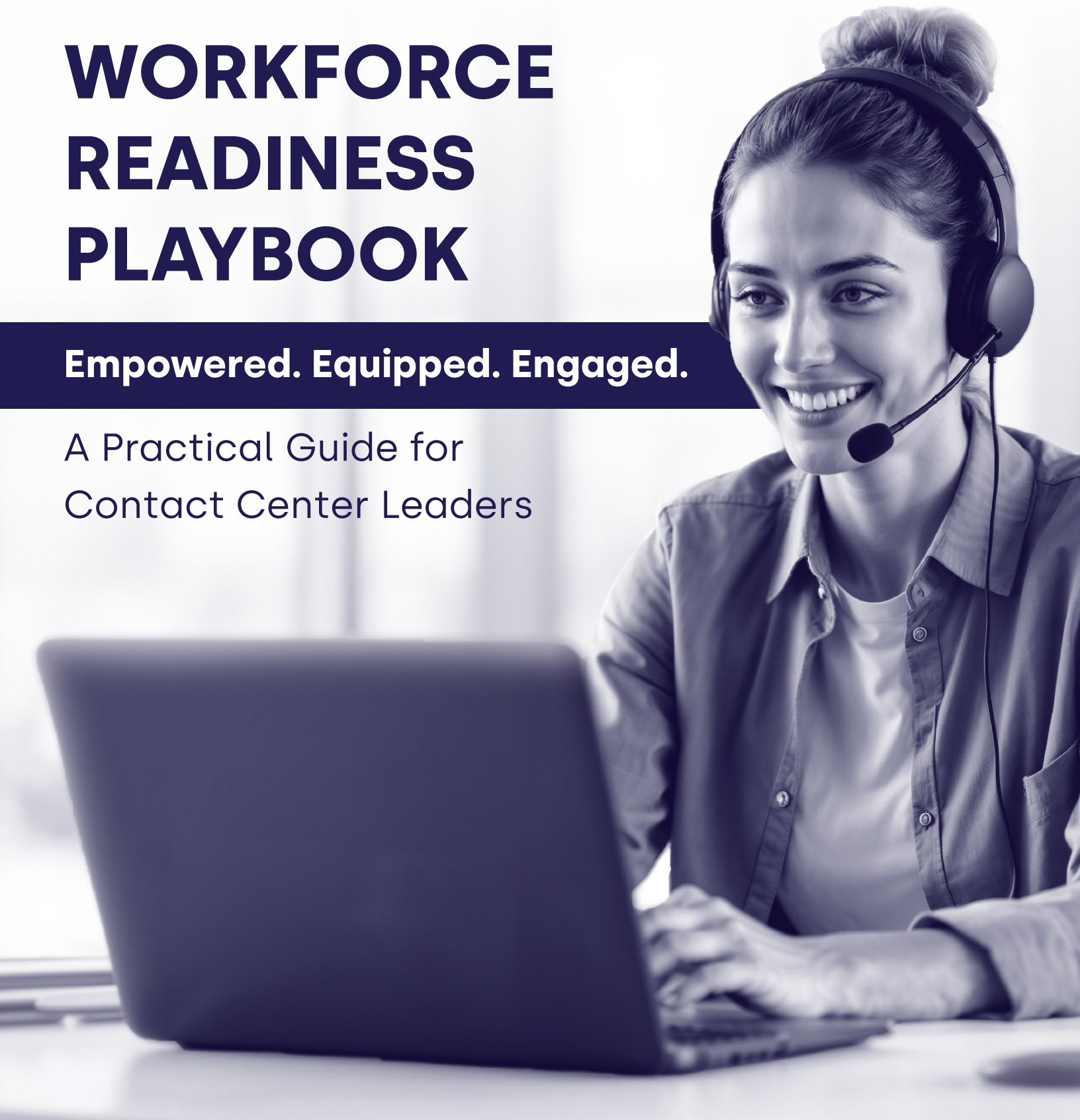




WORKFORCE READINESS PLAYBOOK

Empowered. Equipped. Engaged.

A Practical Guide for
Contact Center Leaders





Orientation & How to Use This Playbook

Workforce Readiness:

Empowered, Equipped, Engaged

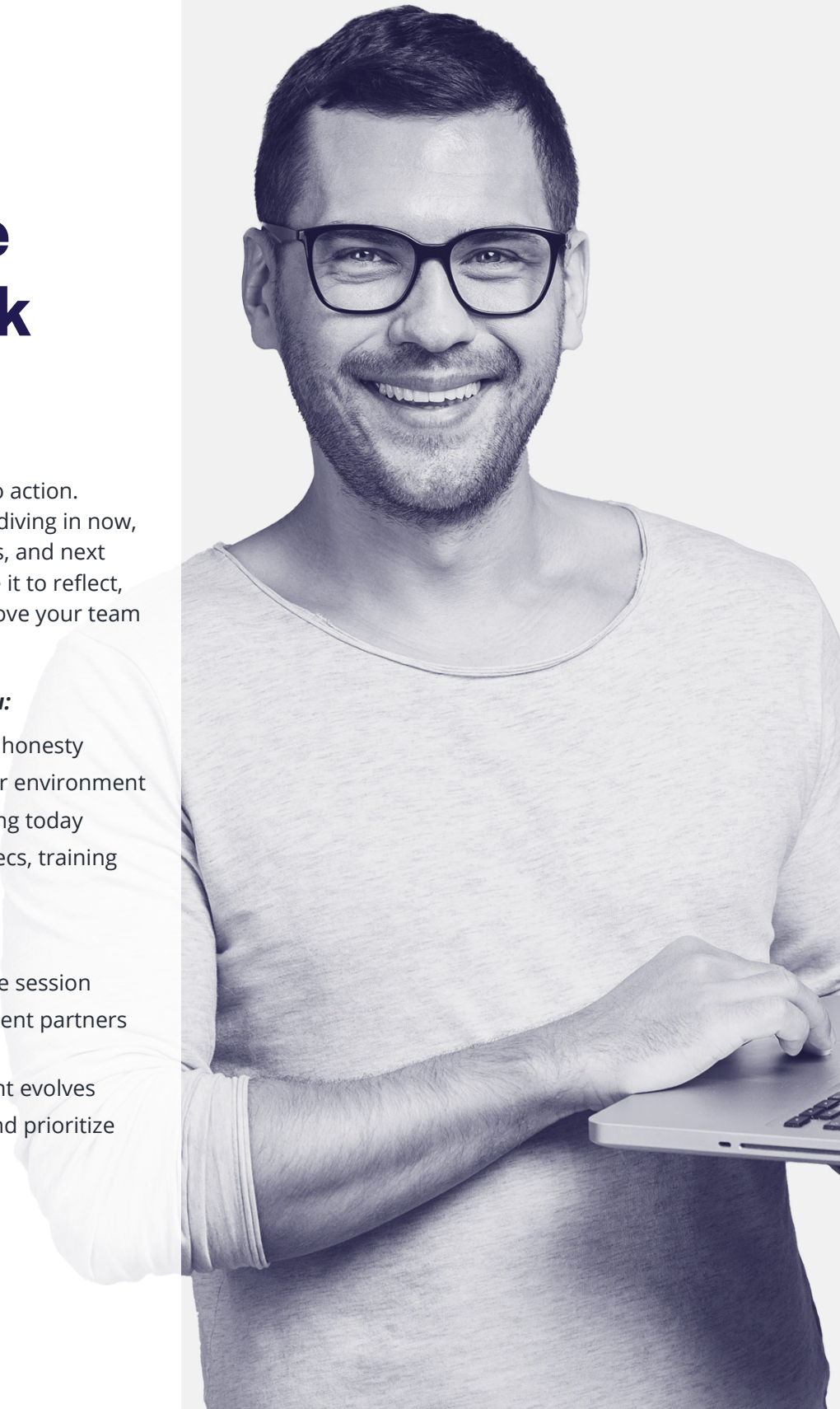
This playbook is your bridge from ideas to action. Whether you joined the workshop or are diving in now, it captures the core concepts, frameworks, and next steps to move from insight to impact. Use it to reflect, plan, and guide the conversations that move your team forward.

This is a decision support tool to help you:

- Diagnose your team's gaps with brutal honesty
- Capture real-world examples from your environment
- Choose your next set of moves—starting today
- Guide follow-up conversations with execs, training teams, and frontline leaders

How to use this playboook:

- Revisit the pages you started during the session
- Use it with your leadership or enablement partners to shape next steps
- Reassess quarterly as your environment evolves
- Make it part of how you coach, plan, and prioritize across your team





The Shift You're Navigating

The Change Isn't Coming. It's Already Here.

What's changed in the past 24 months about the way your frontline teams work?

- ☐ New roles
- ☐ Evolving tech
- ☐ Customer expectations
- ☐ New KPIs
- ☐ Increased complexity
- ☐ Hybrid/remote dynamics
- ☐ Pressure to reduce costs
- ☐ Other: _____

- Describe one example of how your agent job description has changed:

- What new skill or expectation wasn't even on your radar two years ago?

- What part of your old approach no longer works?

"The risk isn't change. It's misalignment between what's changing and how you prepare your people."

Justin Robbins,
Founder & Principal Analyst at Metric Sherpa





PILLAR 1

Acumen

Definition:

Acumen is the operational knowledge your people need to perform. Beyond facts—context, clarity, and fluency.

Common Gaps:

- Teams ask Slack before checking systems
- Tenured employees gatekeep essential info
- Onboarding is 80% “watch and guess”

Real-World Scenario:

Your product changes monthly. Customers know more than your agents. The KB is out of date. Agents improvise—and your brand pays the price.

Self-Assessment (1–5 scale):

1 = Not at all true, 5 = Consistently true

	1	2	3	4	5
We’ve clearly defined what our agents need to know					
Agents can access accurate info without asking a peer					
Our knowledge hub is easy to search and regularly updated					
Training materials align with the latest workflows					

Activators:

- Build a living, Google-indexed knowledge base
- Include frontline staff in documentation updates
- Add "what changed this week" in team huddles
- Reinforce adoption through consistent team-wide messaging of weekly change updates.
- Use AI chat assist to serve curated answers

Leadership Checklist:

- ☐ Do you track repeat questions agents ask internally?
- ☐ Do you reward knowledge contributors?
- ☐ Are team leads accountable for keeping info fresh?

My Actions:

① Start:

② Fix:

③ Delegate:



Acumen Audit Template

Use Case: Evaluate the current state of knowledge management and readiness across roles.

Instructions:

- Fill this out with your supervisors or enablement team
- Use Agent Feedback scores from surveys or informal conversations
- Identify outdated or duplicate sources for consolidation

Knowledge Area	Source Location	Up-to-Date? (Y/N)	Owner	Last Updated	Agent Feedback (1–5)
Product/Service Details					
Policy & Compliance					
Escalation Processes					
Tool/System Workflows					
Soft Skill Coaching Tips					



PILLAR 2

ABILITY

Definition:

Ability is the applied skillset that drives performance. It's what happens after someone understands what to do.

Common Gaps:

- Hiring is urgency-driven, not capability-based
- Coaching is reactive or missing entirely
- QA doesn't translate into better behavior

Real-World Scenario:

Your top performers deliver incredible service—but no one can explain why. New hires struggle. Coaching lacks structure.

Self-Assessment (1–5 scale):

1 = Not at all true, 5 = Consistently true

	1	2	3	4	5
Our hiring profiles reflect future skills, not legacy tasks					
We develop soft skills with structure—not hope					
Our coaching is personalized, not templated					
We assess skill progression, not just QA pass/fail					

Activators:

- Develop role-based competency maps
- Use real interactions in weekly skill labs
- Redesign QA to evaluate behavior, not boxes
- Build personalized training paths from coaching insights
- Assign peer mentors with specific focus areas

Leadership Checklist:

- ☐ Are you training for complexity, not just compliance?
- ☐ Do you assess skills quarterly, even outside QA?
- ☐ Do your best reps help others level up?

My Actions:

1 Start:

2 Fix:

3 Delegate:



Skills Matrix Template

Use Case: Track team member proficiency across required skill areas.

Instructions:

- Use a 1–5 scale based on observation, QA, and coaching
- Identify coaching priorities for the next 30 days
- Update monthly to track development trends

[illegible]



PILLAR 3

ACTIVATION

Definition:

Activation is your team's ability to do the work—without fighting tools, broken processes, or lack of access.

Common Gaps:

- Agents toggle between 8+ systems
- Escalations stall because no one owns the outcome
- Simple updates require supervisor overrides

Real-World Scenario:

An agent has the answer but not the permission. It takes three steps to do one thing. The system is their biggest blocker.

Self-Assessment (1–5 scale):

1 = Not at all true, 5 = Consistently true

	1	2	3	4	5
Our frontline tools are integrated and intuitive					
Agents can resolve common issues without bottlenecks					
We know which workflows cause the most friction					
Escalation paths are clear and fast					

Activators:

- Run a quarterly "friction audit" with frontline reps
- Expand agent autonomy to resolve issues
- Streamline escalations with time-based triggers
- Use tooltips or AI nudges in-system

Leadership Checklist:

- ☐ Have you walked through the process as a new agent recently?
- ☐ Is there a clear way for agents to flag friction?
- ☐ Do ops and tech teams act on frontline feedback?

My Actions:

- 1 Start:
- 2 Fix:
- 3 Delegate:



Friction Log

Use Case: Create a running log of systems, tools, or process breakdowns impacting performance.

Prompts for Collection:

- What slows you down every day?
- What process doesn't make sense anymore?
- What's clunky, redundant, or just painful?

[illegible]



PILLAR 4

ALIGNMENT

Definition:

Alignment is how well your people connect their work to mission, purpose, and business outcomes.

Common Gaps:

- Strategy lives in exec slides—never hits the floor
- Recognition favors speed, not significance
- Teams feel like order takers, not value creators

Real-World Scenario:

An agent resolves 80 tickets/day but can't say why the work matters. Morale dips. Quality slides. Talent leaves.

Self-Assessment (1–5 scale):

1 = Not at all true, 5 = Consistently true

	1	2	3	4	5
Our team understands how their work impacts customers					
We connect goals to business strategy in daily operations					
Recognition ties to values and outcomes					
We create space to talk about meaning—not just metrics					

Use a digital hub to connect work to values, purpose, and impact.

Activators:

- Share business in huddles, not just dashboards
- Use customer stories in team recognition
- Run quarterly “mission check-ins”
- Add “why it matters” to every SOP and team update

Leadership Checklist:

- ☐ Can every team member explain how they support the business?
- ☐ Are values reinforced through actions and stories?
- ☐ Do supervisors communicate the big picture regularly?

My Actions:

1 Start:

2 Fix:

3 Delegate:



Mission-to-Metrics Map

Use Case: Help your team connect their day-to-day work to business outcomes and purpose.

Instructions

- Fill this out with your team
- Use during huddles to reinforce meaning
- Incorporate recognition into dashboards or team meetings

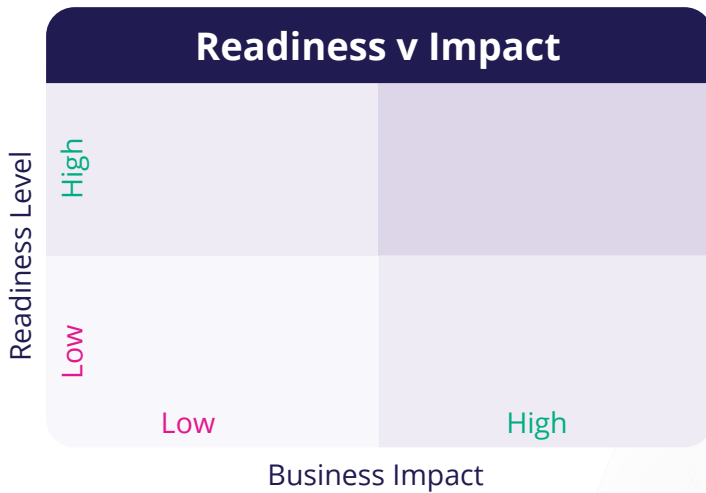
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Prioritization Matrix

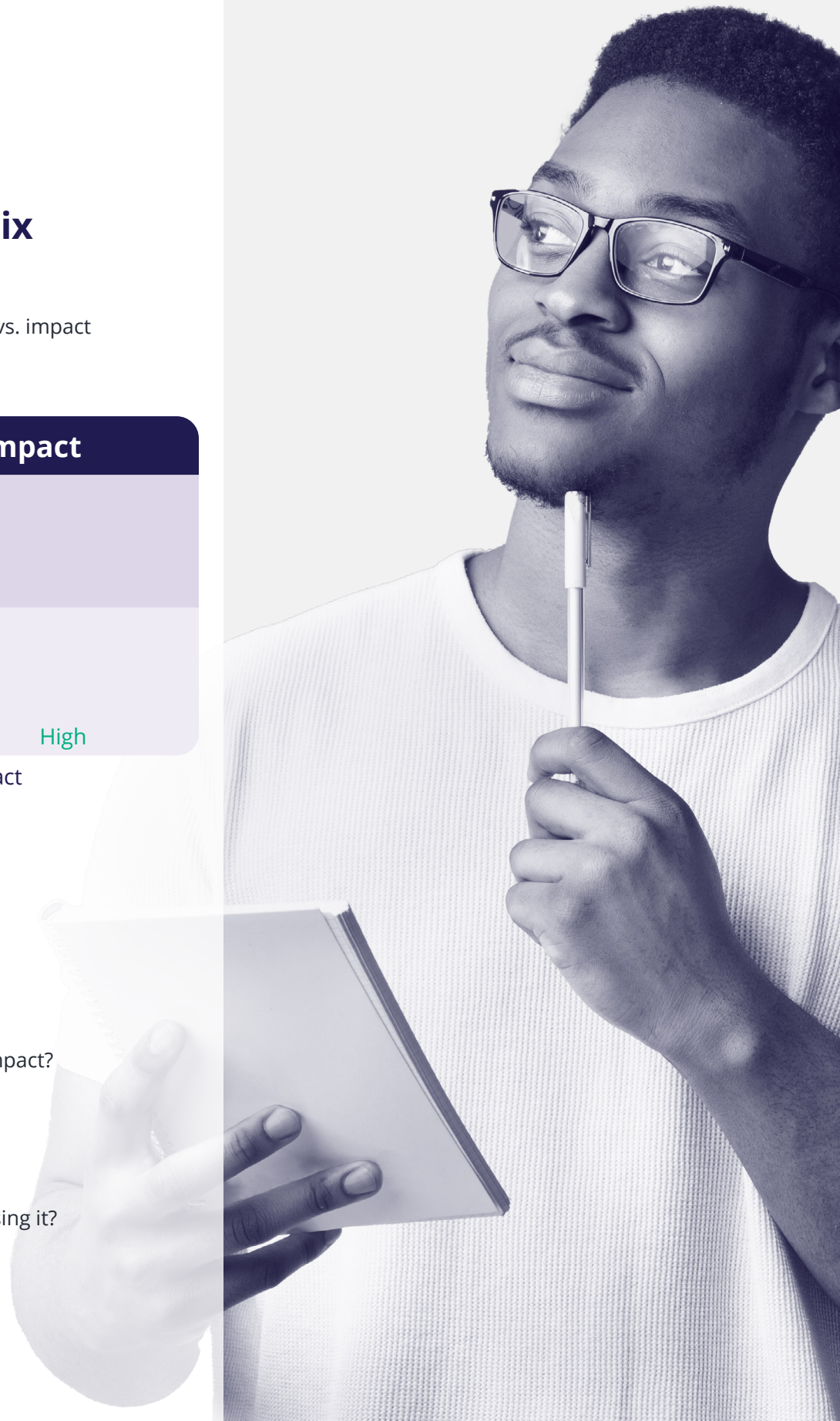
Instructions

Plot each pillar using the readiness vs. impact matrix below.



Prompt:

- My biggest priority is:
- If I fix this, what's the potential impact?
- What's blocking me from addressing it?





30-Day Commitment Plan

What Will You Move First?

- I will start by...
- I will involve...
- I will get buy-in from...
- The signal I'll use to measure progress is...
- If I hit resistance, I will...
- First action step (within 72 hours):



Conversation Starter Template

Take This Back to Your Team

Instructions:

Use this one-page script to run a 30-minute team discussion next week.

Intro:

"We just did a readiness session. I want your view. Let's talk about how we're doing on the four pillars."

Questions:

1. What's getting in your way right now?
2. What's one thing we could fix that would make your job easier?
3. What part of your role feels disconnected from the big picture?
4. What training or support do you wish you had?

Follow-Up:

Use this to guide ops, enablement, and leadership discussions.





Monthly 1:1 Coaching Conversation Flow

Purpose: Move beyond performance management into strategic development.

Structure:

1. **Start with Wins:** What went well this month?
2. **Check the Pillars:**
 - **ACUMEN:** Are there any gaps in what you need to know?
 - **ABILITY:** What skills are you building? Where do you feel confident?
 - **ACTIVATION:** What's making the job harder than it needs to be?
 - **ALIGNMENT:** Do you understand how your work connects to the bigger picture?
3. **Set a Development Focus:** Pick one focus area for the next month
4. **Support Plan:** What resources or help do you need?
5. **Close with Recognition and Intent:** Highlight effort and set one goal





Team Huddle Plug-In Kit

Use Case: Equip team leads to reinforce the pillars weekly without needing new materials.

Week	Focus Pillar	Huddle Prompt	Activity/Follow-Up
1	Acumen	“What’s one thing you learned this week?”	Share one KB article update
2	Ability	“What’s one thing you coached someone else on?”	Call out peer coaching
3	Activation	“What slowed you down most this week?”	Add to Friction Log
4	Alignment	“Who made an impact beyond their numbers?”	Nominate for value recognition



30-Day Self Check-In

Book Time With Yourself.

- What did I take action on?
- What signals of change am I seeing?
- What still needs attention?
- Who do I need to follow up with?
- What's my next 30-day move?





60-Day Team Transformation Sprint

Purpose: For leaders ready to pilot a focused upgrade across all four pillars.

Week 1-2: **Diagnose**

- Run team feedback sessions
- Fill out Friction Log, Skills Matrix, and Acumen Audit

Week 3-4: **Prioritize**

- Identify one initiative per pillar
- Assign owners, success metrics, and timelines

Week 5-6: **Activate**

- Launch quick wins (e.g., peer learning pod, system tweak, OKR clarity session)
- Begin recognition program based on values/impact

Week 7-8: **Evaluate + Expand**

- Host a playback session with the team
- Ask: What changed? What worked? What next?





About Central: Central's AI Performance Experience Platform gives employees real-time performance visibility, along with the knowledge, skills, and motivation to succeed—while empowering managers with the insights and tools to coach more effectively. By driving both frontline and manager success, you build a more engaged, high-performing team that delivers better business results.



About Metric Sherpa: Metric Sherpa is the next-generation analyst firm CX leaders rely on for clear, independent insight. We deliver original research, strategic guidance, and content that drives real decisions. Founded by CX expert Justin Robbins, we bridge the gap between strategy and execution with practical, experience-backed analysis. Our work helps CX tech companies and business leaders understand the market, sharpen their message, and lead with confidence. Learn more at metricsherpa.com.