FIELD GUIDE / QA & PEOPLE

From QA finding to a useful coaching conversation

A review creates value when it helps someone understand what to repeat or improve. Use this process to turn a call finding into specific feedback and a meaningful follow-up.

01 Confirm the finding in context

Start with the original communication and the criteria your agency uses. AI-assisted output can help direct attention, but the supervisor needs to understand what happened and why the behavior matters. Review the surrounding context before deciding what feedback to give.

- Identify the criterion and the specific observable behavior.
- Listen to the relevant communication, including enough context to interpret it.
- Separate a confirmed finding from an unanswered question.
- Check whether reviewers would interpret the criterion consistently.

02 Choose one useful development objective

A long list of weaknesses makes a conversation harder to act on. Choose a focused behavior and describe what good performance would look like. Include strengths worth reinforcing where they relate to the same skill.

- Behavior to reinforce or develop.
- Why the behavior matters in the role.
- Evidence from the communication.
- What the person should be able to demonstrate next.

03 Make the conversation collaborative

Describe the observed behavior and invite the dispatcher’s perspective. Explore what influenced the interaction. Keep the conversation grounded in evidence and the shared expectation, then agree on the next action.

- Explain the finding without substituting a score for the conversation.
- Ask how the employee understood the interaction.
- Clarify the expected behavior and any relevant procedure.
- Agree on a practical action the employee and supervisor can both describe.

04 Select development that matches the need

The right next action may be a coaching discussion, a learning activity, a simulation, or another supported practice opportunity. Match the activity to the behavior. Completing an assignment is a process milestone; it does not by itself show that performance improved.

- Activity and purpose.
- Person responsible for support or observation.
- Evidence the activity should produce.
- Follow-up task using the same criterion.

05 Return to comparable work

At follow-up, review a relevant example using the same expectation. Record whether the behavior was demonstrated and what context affected the result. Decide whether to reinforce progress, continue support, or revise the development plan.

- Original finding and the agreed action.
- Activity completed and feedback provided.
- Evidence from subsequent work.
- Next decision, owner, and review point.

PUT THE GUIDE TO WORK

Use this guide to shape your agency’s evaluation and working discussions. Confirm product availability and supported configurations with Equature.

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