

METHOD • AIL-MF-2026-01

Coaching Trigger Architecture

A Framework for Precision AI Coaching Interventions

Gregg Collins • Brandon Dickens • February 2026

The value of AI coaching is not merely availability — it is timing. An AI coach that is always on is not the same as an AI coach that knows when to engage. This paper proposes a taxonomy of five coaching-trigger categories — Events, Changes, Goals, Opportunities, and (Bad) Outcomes — that connect the signals already flowing through enterprise systems to specific coaching interventions. For each category we identify the operational data sources that generate the signal (ACD, CRM, QM, LMS, HRIS, BI platforms), the detection logic, and the appropriate coaching response, whether a direct conversation with an AI coach or a mediated recommendation of existing training content. We outline a phased deployment starting with Bad Outcomes, a measurement framework that closes the loop using the same metric that fired the trigger, and the relationship to existing compliance and CAPA processes in regulated industries.

Coaching Triggers

When Should an AI Coach Engage — and What Data Makes the Decision?

Introduction

An AI coach that is always available is not the same as an AI coach that knows when to show up. The value of AI coaching depends on timing — reaching the right person at the right moment with the right intervention. Too early and it's noise. Too late and the mistake has already compounded. The question is: what should trigger an AI coach to initiate contact with a learner?

The answer is already sitting in enterprise systems. Every organization generates a continuous stream of data about what its people are doing, how they're performing, what's changing around them, and what's coming next. ACD logs, CRM records, QA

scores, LMS completions, HRIS transitions, BI dashboards — these systems already detect the moments that matter. What's missing is the systematic connection between a signal in the data and a coaching response.

This paper defines a taxonomy of coaching triggers — the specific categories of data signals that indicate when someone needs help. For each category, it identifies the enterprise data sources that generate the signal, the detection logic, and the appropriate coaching response. The trigger fires; the system responds. The goal is a concrete, implementable framework that connects operational data to coaching interventions.

The taxonomy covers five categories: Events, Changes, Goals, Opportunities, and (Bad) Outcomes. Together they span the full range of coaching-relevant moments — from something that just went wrong to something that's about to happen. Each trigger category answers a different version of the same question: is now the right time to coach this person, and on what?

The Five Trigger Categories

Category	What It Detects	Trigger Timing	Definition
Events	Something notable happened	Immediate	Discrete occurrences — incidents, escalations, complaints, near-misses
Changes	The landscape shifted	Proactive	Environmental shifts — policy updates, new products, role transitions
Goals	Performance drifted	Threshold-based	Metrics crossing defined boundaries — quota misses, KPI breaches
Opportunities	A high-stakes moment approaches	Anticipatory	Forward-looking prep — upcoming meetings, certifications, new assignments
(Bad) Outcomes	Something went wrong	Retrospective	Measurable negative results — churn, deal losses, compliance failures

These are not theoretical categories. Each one maps directly to data signals already flowing through enterprise systems.

1. Event Triggers — Something Happened

A customer escalates to a supervisor. A compliance flag fires during an interaction. A near-miss incident gets reported. An agent requests help mid-call. Events are discrete occurrences — something notable happened, and the system recorded it. The

coaching question is: does this person need a debrief, a refresher, or practice handling this situation better next time?

Trigger Examples and Data Sources:

Trigger	Data Source	Detection Logic
Customer escalation to supervisor	ACD — transfer to supervisor queue	Any supervisor transfer event
Compliance violation flagged	QM — compliance_flags triggered	Any compliance flag on an interaction
Customer complaint filed	CRM — case_reason = “complaint”	Complaint case created and linked to agent
Agent requests supervisor help	ACD — consult/conference event	Real-time assist request during interaction
Security or data handling error	Ticketing — security event logged	Security incident attributed to employee

Where the data lives:

Event triggers are detected from ACD systems (transfers, escalations, real-time events), QM platforms (compliance flags, auto-scored evaluations), ticketing systems (incident reports, security logs), and speech analytics (keyword alerts, sentiment shifts). These are generally the most structured and accessible data sources in an enterprise — event data is already being captured; it just isn’t connected to coaching.

What fires:

When an Event trigger fires, the response is typically a coaching debrief on what happened, followed by targeted practice on the relevant skill. For a compliance flag,

that might mean an immediate refresher on the specific procedure. For a supervisor escalation, it might mean a practice scenario built around the situation type that caused the escalation.

2. Change Triggers — The Landscape Shifted

A new policy takes effect. A product gets updated. An employee moves to a new role. A regulatory requirement changes. A system migration launches. Changes create coaching needs before mistakes happen — the environment shifted, and people need to adapt. The coaching question is: has this person been prepared for the change, and if not, what do they need before the gap manifests as an error?

Trigger Examples and Data Sources:

Trigger	Data Source	Detection Logic
New policy or procedure effective	Policy management system — publish event	Policy published with affected role mapping
New product launched	CRM / product catalog — catalog update	New product added with customer-facing flag
Employee role transition	HRIS — role_change event	Role change within last 30 days
Regulatory or compliance rule change	Compliance management system	Regulatory update published with training flag
Seasonal business shift	Calendar / WFM — seasonal flag	Date-based seasonal trigger

Where the data lives:

Change triggers come from HRIS (role changes, new hires, return from leave), policy management systems (version updates, effective dates, affected-role mappings), CRM and product catalogs (product launches, pricing updates), IT change management (system migrations, tool updates), and compliance management systems (regulatory changes). Some of these integrations are straightforward; others — particularly HRIS and policy systems — may start semi-automated, with an admin entering “new policy effective 3/1” while deeper integration is built. The trigger framework works the same regardless of whether the signal is fully automated or manually entered.

What fires:

Change triggers call for proactive coaching — preparation for the new reality before errors begin. For a new product launch, that might mean a practice simulation covering key features and common customer questions before the agent takes a live call. For a role transition, it might mean an onboarding sequence tailored to the specific competency gaps between the old role and the new one.

3. Goal Triggers — Performance Drifted

An agent’s handle time is trending above the team average. A sales rep is behind quota at the quarter’s midpoint. A team’s CSAT is declining week over week. A certification is approaching expiration. Goal triggers connect coaching to the metrics the organization already tracks. The coaching question is: is this person’s performance slipping in a way that targeted coaching can address?

Trigger Examples and Data Sources:

Trigger	Data Source	Detection Logic
Sales quota miss at midpoint	CRM — pipeline vs. quota	Attainment < 80% at period midpoint
QA score below acceptable range	QM — evaluation scores	3+ consecutive scores below threshold
Handle time consistently high	ACD — handle_time trend	Rolling avg > 2σ above team mean for 7+ days
Certification expiring	LMS — certification_expiry	Certification expires within 30 days
Team KPI anomaly	BI platform — anomaly alert	Automated anomaly detection fires

Where the data lives:

Goal triggers are detected from BI and reporting platforms (anomaly alerts, threshold monitors), CRM (pipeline metrics, quota tracking), ACD (handle time, after-call work, availability), QM (evaluation score trends), and LMS (certification tracking, assessment scores). Many organizations already have BI dashboards with alert thresholds configured — Power BI, Tableau Pulse, Looker. The trigger system can subscribe to those existing alerts rather than building detection from scratch.

What fires:

Goal triggers call for diagnostic coaching — identifying the specific area where performance is slipping and targeting the intervention there. For a rep behind on quota, the system should look at which stage of the sales process is weakest and focus coaching on that stage, not deliver a generic sales refresher. For declining QA scores,

the coaching should address the specific evaluation criteria that are pulling the score down.

4. Opportunity Triggers — Something Important Is Coming

A rep has a high-stakes client meeting tomorrow — and it involves the objection type they struggled with last quarter. An agent is about to take a call from a customer with an open complaint. An employee just got assigned their first case of a type they've never handled. Opportunity triggers are the system's proactive capability. They scan upcoming context and match it against known gaps. The coaching question is: can we prepare this person for success before the moment arrives?

Trigger Examples and Data Sources:

Trigger	Data Source	Detection Logic
High-stakes meeting tomorrow	Calendar + CRM (deal size)	Meeting with account > \$X value threshold
Customer with complaint history calling	ACD + CRM (customer match)	Returning customer with low CSAT or open complaint
First time handling specific case type	CRM + LMS (competency map)	No prior handling experience or training record
Audit period approaching	Compliance calendar	Audit scheduled within 30 days
Return from extended leave	HRIS — return_date	Returning from 14+ day absence

Where the data lives:

Opportunity triggers require cross-source matching — combining what's coming up (calendar, pipeline, schedule) with what this person's gaps are (LMS competency

maps, historical performance data, QM scores). Data sources include calendar systems (upcoming meetings, scheduled events), CRM (deal pipeline, customer history, account risk flags), LMS (competency maps, training completion records), WFM (seasonal forecasts, schedule assignments), and HRIS (leave/return dates, role assignments). This cross-matching makes Opportunity triggers the most complex category to implement, but also the most valuable — every other trigger category is reactive in some sense. Opportunity triggers are anticipatory.

What fires:

Opportunity triggers call for preparation coaching — practice on the specific challenge that's coming. For a high-stakes QBR, that might mean a practice simulation using actual account context drawn from CRM data. For an agent about to handle an unfamiliar case type, it might mean a just-in-time coaching session covering procedures and common pitfalls for that case type.

5. (Bad) Outcome Triggers — Something Went Wrong

A customer churned after their last interaction. A deal was lost at a late stage. A case got reopened. CSAT came back below 3 out of 5. An SLA was breached. Bad Outcomes are measurable negative results — the data proves something went wrong. The coaching question is: what happened, and how can this person handle it differently next time?

Trigger Examples and Data Sources:

Trigger	Data Source	Detection Logic
Customer churned after interaction	CRM — account_status = churned	Churn within 30 days of interaction
Deal lost at late stage	CRM — closed-lost + stage ≥ 3	Late-stage deal loss
Case reopened (FCR failure)	CRM — reopen_count > 0	Case reopened within SLA window
Low CSAT on interaction	CRM — csat_score $<$ threshold	CSAT below 3/5 on evaluated interaction
Quality audit failure	QM — total_score $<$ threshold	Score below calibrated minimum

Where the data lives:

Bad Outcome triggers come from CRM (case outcomes, CSAT, churn events, deal results, account health scores), QM (evaluation scores, audit results), ticketing systems (rework, reopened cases, SLA breaches), VoC platforms (NPS, survey results), and LMS (assessment failures). This is the most data-rich and immediately deployable trigger category. Any organization with a CRM and a QM platform can begin detecting Bad Outcome triggers immediately.

What fires:

Bad Outcome triggers call for retrospective coaching — understanding what went wrong and practicing the corrective skill. For a late-stage deal loss, that might mean coaching focused on the specific objection type or sales stage where the deal stalled. For a case reopen, it might mean practice on resolution quality for the specific issue

type. The key is connecting the outcome to the root behavior, not just flagging that something went wrong.

What Happens When a Trigger Fires

Triggers detect the moment. The next question is: what intervention does the learner receive? There are two pathways, and they work together.

Pathway 1: The AI Coach Engages Directly

The AI coach initiates a conversation with the learner based on the trigger context. What happens next is not predetermined — the coach reads the situation and decides how deep to go.

A trigger might warrant nothing more than a brief, conversational check-in: “You missed the disclosure requirement on today’s call — here’s what to watch for and why it matters.” That might be enough. But if the conversation reveals confusion about the underlying procedure, the coach escalates naturally — asking questions, probing understanding, surfacing where the gap actually is. If the gap is significant, the coach can move into guided practice: building a scenario on the spot that lets the learner work through the specific situation they struggled with. For a repeated pattern or a compliance-critical issue, that practice might become a full simulation — an immersive role-play with realistic pressure and a structured debrief afterward.

The point is that the coach operates along a continuum, not in discrete tiers. A coaching interaction that starts as a quick nudge can deepen if the coach determines the learner needs more. One that begins with the intention of serious practice might resolve quickly if the learner demonstrates competence early. The trigger provides the occasion and the context; the coach determines the depth in real time, the same way a skilled human coach would.

Pathway 2: Existing Training Content

Not every trigger requires a live coaching interaction. Sometimes the right response is to surface a specific piece of existing training — a module, a reference document, a recorded session, a certification course — that addresses the gap the trigger identified.

This pathway is particularly relevant for:

- Compliance and regulatory triggers where approved, versioned training content is required
- Certification expiry where an established prep course already exists
- New product or policy changes where the organization has already developed training materials
- Low-severity, well-understood gaps where a reference document or short module is sufficient

The Coach as Mediator

The strongest implementation uses the AI coach as the mediating layer for both pathways. Rather than the system sending a learner a link to a course, the AI coach delivers the recommendation with context: *Here's why this is relevant to you right now, here's what to focus on, and I'm here to practice with you afterward.* The coach frames the training, connects it to the trigger event, and follows up on whether the gap closed.

This mediated approach has several advantages. The learner understands why they're being directed to a specific resource. The coach can assess after the training whether comprehension actually occurred. And the system avoids the dead-end of “training assigned, completion tracked, behavior unchanged” that plagues most LMS-driven interventions.

Organizations can implement either pathway independently. The direct coaching pathway works without an existing content library. The content recommendation pathway works without AI coaching capabilities. But the combination — the coach as the intelligent layer connecting triggers to both coaching conversations and existing content — is where the model is most effective.

Audience Targeting: Who Gets Coached

When a trigger fires, the system must determine the scope of the response:

Scope	Detection Logic	Response
Individual	One person shows the pattern	1:1 coaching tailored to the trigger
Cohort	3+ people share the same trigger within a time window	Group intervention; identify shared characteristics (team, tenure, role)
Organization-wide	Pattern affects 15%+ of population, or root cause is systemic	Org-wide intervention + management notification

Not every problem is a training problem. When triggers consistently co-occur with environmental factors — system outages during compliance failures, understaffing during quality dips, unclear documentation during procedure errors — the system should flag these for operations review rather than routing to coaching. A simple trainability check, even a manual one in early deployment, prevents spending coaching resources on problems that require process or system changes.

Getting Started

The trigger system is designed for phased deployment. Not all five categories or all data sources are required to start.

Timeline	Milestone	What's Active
Weeks 1-2	Connect to one data source (QM auto-scores or CRM outcomes). Configure Bad Outcome triggers.	Bad Outcomes triggers firing; coaching nudges or content recommendations deploying
Weeks 3-4	Add Events triggers from ACD (escalations, supervisor transfers) and QM (compliance flags).	Events + Bad Outcomes active
Month 2	Add Goals triggers from BI dashboards or CRM metrics. Begin cohort detection.	3 categories active; individual + cohort targeting
Month 3	Add Changes triggers (HRIS role changes, policy updates — may start semi-automated).	4 categories active
Months 4-6	Add Opportunities triggers (calendar + CRM cross-matching). All 5 categories active.	Full trigger system operational

The recommended starting point is Bad Outcomes — it uses the most structured and universally available data (CRM outcomes, QM scores), and it connects coaching to measurable business results from the first trigger fired. Events is the natural second category, as the data sources overlap significantly. Goals follows once BI integration is in place. Changes and Opportunities require broader system integration and are best added once the core trigger infrastructure is proven.

Measurement

The trigger system creates a natural measurement framework. Each trigger has a corresponding operational metric — the same metric that caused the trigger to fire in

the first place. The question after coaching is simple: did the trigger stop firing?

Level	What It Measures	Role in Trigger System
Reaction	Did the learner find the intervention useful?	Tracked for quality improvement, not as a success gate
Learning	Did knowledge or skill change during coaching or training?	Necessary but not sufficient — simulation scores, comprehension checks
Behavior	Did real-world performance change?	The primary measure — did the operational metric improve?
Results	Did business outcomes improve?	Tracked for ROI; aggregated across triggers

The strongest signal is at the behavior level: the same data source that generated the trigger provides the measurement. If QA scores triggered the coaching, QA scores measure whether it worked. If escalation rates triggered it, escalation rates tell you whether behavior changed. This closes the loop without requiring any additional measurement infrastructure.

Data Source Summary

Data Source	Trigger Categories Served	What It Provides
ACD (Automatic Call Distributor)	Events, Goals	Escalations, transfers, handle time, real-time assist requests, availability metrics
CRM	Events, Goals, Opportunities, Bad Outcomes	Case outcomes, deal results, pipeline data, customer history, CSAT, churn, account health
QM (Quality Management)	Events, Goals, Bad Outcomes	Auto-scored evaluations, compliance flags, calibrated quality scores
LMS (Learning Management System)	Goals, Opportunities	Certification tracking, competency maps, assessment scores, training completion
HRIS	Changes, Opportunities	Role changes, new hires, leave/return dates, org structure
BI Platform	Goals	Anomaly detection, threshold alerts, trend monitoring, KPI dashboards
Speech Analytics	Events	Keyword alerts, sentiment detection, topic identification
Policy Management System	Changes	Policy version updates, effective dates, affected-role mappings
Calendar	Opportunities	Upcoming meetings, scheduled reviews, event timelines

Data Source	Trigger Categories Served	What It Provides
WFM (Workforce Management)	Changes, Opportunities	Staffing levels, schedule assignments, seasonal forecasts
Ticketing / Service Management	Events, Bad Outcomes	Incident reports, rework, reopened cases, SLA tracking, security events
VoC (Voice of Customer)	Bad Outcomes	NPS scores, survey responses, feedback themes

Considerations for Regulated Industries

The five trigger categories map to existing compliance frameworks. Pharma's CAPA (Corrective and Preventive Action) process is already trigger-based: deviations trigger investigations, investigations drive corrective actions, corrective actions trigger retraining. Financial services operates similarly — audit findings, regulatory changes, and compliance violations trigger mandated training under established regulatory frameworks.

The Coaching Trigger Architecture extends this logic from quality management to people development. For organizations already operating CAPA or similar compliance trigger systems, the infrastructure and organizational muscle for trigger-based interventions already exists. The extension is connecting those triggers to AI coaching and targeted content rather than only to generic retraining assignments.

Data privacy requirements (HIPAA, PCI, GDPR) can be addressed through ephemeral data processing — retaining only derived trigger signals and coaching outcomes, not raw interaction data. Organizational privacy and security review should be part of deployment planning.