

EVALUATION CHECKLIST

Ensure Your Business Is Prepared With Our Call Quality Evaluation Checklist

Use the following list to guide you when developing your own Call Quality scorecards for your team. We recommend you start with a short list of “must have” items for each stage of calls and review performance on a regular basis to encourage improvement and add new items as employee confidence and skills are built over time.

Greeting -

- ☐ The employee adhered to the recommended greeting
- ☐ If the call was transferred, the employee adapted their greeting accordingly
- ☐ The employee identified themselves to the customer
- ☐ The employee mentioned your company name
- ☐ Optional: The employee stated that the call is being recorded (if using this feature)
- ☐ The employee asked for the caller's name
- ☐ The employee thanked the customer for calling
- ☐ The employee offered assistance to the caller

Customer Verification -

- ☐ The employee verified the customer's account using the appropriate information (e.g., first and last name spelling, account number, credit card number, transaction number, social security number, amount of previous bill or purchase, etc.)
- ☐ The employee accurately accessed the customer's account with the information provided
- ☐ If the call was transferred, the employee sufficiently adapted their account verification questions accordingly

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Contact Information Confirmation/Verification -

- ☐ The employee asked for the caller to spell their name
- ☐ The employee asked for the caller's company name
- ☐ The employee asked for the caller's telephone number
- ☐ The employee asked for the caller's email address

Problem Solving Abilities -

- ☐ The employee apologized for the issue, inconvenience or cost associated with the problem
- ☐ The employee took ownership of the problem
- ☐ The employee asked pertinent questions to accurately diagnose the problem
- ☐ The employee requested the error/issue details from the caller
- ☐ The employee used appropriate company resources to address the issue (prior to seeking manager involvement)
- ☐ The employee provided the most appropriate solution
- ☐ The employee informed the customer of the estimated time-line to resolve their issue
- ☐ The employee informed the customer of relevant supporting documentation to help resolve the issue
- ☐ The employee provided a reference number to the customer after resolving their issue
- ☐ The employee confirmed that the issue was resolved or the transaction was complete
- ☐ The caller's issue was sufficiently addressed

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Protocol Compliance -

- ☐ The employee updated the customer's contact information in the company's computer system (CRM) and relevant business tools
- ☐ The employee documented important information in the notes regarding the call
- ☐ The employee received prior authorization when negotiating prices, offering discounts or giving refunds
- ☐ The employee quoted the customer with the correct price for the product or service
- ☐ The employee recommended the most appropriate product, service, or pricing plan
- ☐ The employee leveraged up-selling and cross-selling opportunities to additional products/services
- ☐ The employee informed their colleagues of a new bug, issue, or product/service issue

Call Handling Skills -

- ☐ The employee followed correct procedures for placing the customer on hold
- ☐ The employee followed correct procedures for transferring the call
- ☐ The employee followed correct procedures for conferencing in a colleague
- ☐ The employee followed correct procedures for escalating a call to their manager

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Customer Service Quality -

- ☐ The employee used the caller's name throughout the call
- ☐ The employee summarized the customer's main points before troubleshooting or offering a solution
- ☐ The employee received the caller's permission to place them on hold before doing so
- ☐ The employee limited the duration of hold time to an appropriate amount
- ☐ The employee muted the caller when appropriate
- ☐ The employee answered the customer's question correctly
- ☐ The employee transferred the call to a colleague when necessary and/or appropriate
- ☐ The employee conferenced in a colleague when appropriate
- ☐ The employee adequately addressed the caller's needs
- ☐ The employee transferred the call to a manager when the customer requested for them to do so

Call Etiquette -

- ☐ The employee used the proper pronunciation of the caller's name
- ☐ The employee maintained proper tone, pitch, volume and pace throughout the call
- ☐ The employee used courteous words and phrases
- ☐ The employee adapted their approach to providing service to the customer based on the customer's unique needs, personality and issues
- ☐ The employee avoided long silences during the call
- ☐ The employee did not interrupt or talk over the customer
- ☐ The employee remained confident throughout the call
- ☐ The employee refrained from using industry or technical jargon
- ☐ The employee was friendly, polite and professional
- ☐ The employee used effective active listening skills

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Script Compliance (if used) -

- ☐ The employee maintained adherence to the script
- ☐ The employee adequately adapted their approach to interacting with the customer, within the script(s) guidelines, when necessary
- ☐ The employee deviated from script when necessary

Closure -

- ☐ The employee adhered to the call closure guidelines
- ☐ The employee adhered to the call closure script (if used)
- ☐ The employee set a follow-up appointment when necessary
- ☐ The employee asked the customer if they have any additional questions or issues before ending the call
- ☐ The employee asked the caller if the service they were provided met their expectations
- ☐ The employee asked the caller if there was anything they can do to enhance the service they provide them
- ☐ The employee thanked the customer for calling

Follow-up -

- ☐ The employee followed up with customer within the agreed upon time frame discussed
- ☐ The employee introduced themselves to the customer and the reason for their call
- ☐ The employee adequately addressed the customer's questions
- ☐ The employee adequately resolved the customer's issue, or provided a time frame for resolution