

CSR quality monitoring sample scorecard – phone contact

1. Information handling and knowledge - 35%

Expertise	Demonstrates knowledge about products and services; has a solid understanding of call center policies and procedures	Yes	No
Accuracy of information	Verifies caller identity, provides accurate information to the customer, correctly enters account changes and notes, and properly codes call for tracking	Yes	No
System use and adherence to processes	Demonstrates good procedural skills, effectively uses systems and tools, and follows call guidelines or scripts	Yes	No

2. Telephone etiquette (opening, body and closing the call) - 35%

Call opening	Uses proper greetings and introductions	Yes	No
Demeanor	Displays a friendly, courteous, and professional attitude	Yes	No
Language and tone	Uses appropriate tone of voice and phrasing, speaks clearly, avoids jargon, and uses correct grammar	Yes	No
Contact skills	Uses appropriate contact handling procedures, including use of the customer's name and transfer/hold requirements	Yes	No
Call closing	Uses appropriate closing; confirms information and actions taken	Yes	No

3. Customer interaction and relationship - 25%

Listening skills	Listens to and empathizes with customers; acknowledges customer concerns	Yes	No
Problem-solving	Gathers appropriate information to determine customer's needs, applies problem-solving skills, resolves the inquiry effectively and follows up with customer	Yes	No
Communication skills	Communicates information about the resolution of the inquiry to the customer clearly and completely	Yes	No
Call approach	Controls the pace and flow of the conversation	Yes	No
Customer relationship management	Maintains up-to-date customer data and follows customer relationship management processes; utilizes up-selling techniques	Yes	No

4. Efficiency - 5%

Overall call handling efficiency	Efficiently handles the customer's request; manages call time effectively	Yes	No
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Total score out of 100% = (Section 1 number of yes answers / 3) x 35% + (Section 2 number of yes answers / 5) x 35% + (Section 3 number of yes answers / 5) x 25% + (Section 4 number of yes answers) x 5%

Table 1 - Quality monitoring sample scorecard – phone contact