



# GENERAL CALL HANDLING AND QUALITY GUIDELINES

**QA is done via live monitoring and post contact, through call recordings and transcript captures. Follow up actions are dependent on the contact scoring and the management team will work closely with your team to resolve any quality issues that may be found via coaching or retraining.**

## Metrics we use to measure call quality

Selecting the Agent:

- Any agent who receives a low NPS
- Any agent with a client reported customer service issue
- Any Agent with Corrective action and follow-up required.
- Any Agent with consistently long talk times.
- Any Agent with a high percentage of escalations
- New Agents within their 90 Day probation
- Agents randomly chosen



## Information used to monitor calls using out internal QA Document: Account knowledge

Agent should make the customer comfortable and have confidence in the agent's ability to troubleshoot.

Too many pauses and putting the caller on hold for long periods of time are indicators that there may be an issue with the agent's knowledge level for that account.

On the opposite side of the spectrum, at no time should the caller feel as though they are not intelligent enough to own or operate the product.  
Talking "down" to the caller is never acceptable.

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## General Account Protocol Metrics

Was the proper greeting used?

Were the proper steps followed to assist the customer?

Was the issue resolved effectively?

If not resolved was the issue escalated properly?

Was the caller assured they would receive a callback within one business day?

Was the caller assured their issue would be resolved to their satisfaction?

Was the call closed properly with "Is there anything else I can help you with?"

## Speed and Efficiency

Was the agent quick to relay account information?

Was the information accurate?

Did the agent answer customer questions quickly and efficiently?

Did the agent know which step to take next in resolving the call or did they have to ask a supervisor and/or escalate the call?

(Asking for help is fine, but it allows us to understand where there are training opportunities with particular agents)

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## Our General Customer Service Expectations

The agent should have a professional tone of voice throughout the call.

If the caller is angry, the agent should be a calming influence and if the caller does not calm down then escalating the call may be the best /only option.

Being rude or short with the caller is not acceptable behavior.

Caller sounds satisfied with the customer service, even if their wishes cannot be met.  
Did the agent sound confident and control the call?

Was the caller put on hold or did the agent interact with the caller?

Did the agent say “Uh” or “Um” or pause silently too often on the call?

Did the agent close the call with: “Is there anything else I can help you with?”

Did the agent thank the customer for calling?

## QA Philosophy for Frontline

QA is performed as a means to be proactive with any call issues that might occur. We utilize this process to afford the agent training opportunities to better perform their job and in turn become better agents. To see our people become better agents is the end goal of the QA team, so any feedback that will allow for positive improvement is strong encouraged.

QA is performed as a means to focus on excellence in customer service, so any calls that meet or exceed this standard should be highlighted and sent out as well as those who need improvement.