

# Call Center **Call Scoring** **Evaluation Form** Items

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Enhance **transparency** and **regularity of quality assurance practices** within your **call center**.



Greeting



Account Verification



Contact Information  
Confirmation



Call center managers are increasingly utilizing call scoring evaluation forms to analyze live and recorded calls and reaping incredible benefits as a result. For example, call scoring evaluation forms have quickly become an invaluable tool for enhancing the transparency and regularity of quality assurance practices in the call center.

These forms have also helped enrich feedback provided to agents during coaching sessions and increased agent motivation to improve performance. As a result, call scoring evaluation forms have become a mainstay in many high-performing call centers.

A sample call scoring evaluation form can be found below. Print it out and begin using it to monitor calls. Engaging in this process will help you quickly identify areas for improvement, which will enable you to build out a data-driven action plan.





## Greeting - Did your agent...

- Adhere to the greeting script?
- Identify themselves to the customer?
- Mention your company name?
- State that the call was being recorded?
- Ask for the caller's name?
- Thank the customer for calling?



## Account Verification - Did your agent...

- Verify the customer's account using the appropriate information (e.g. spelling of first and last name, account number, etc.)?
- Easily access the customer's account with the information provided?
- Adapt their account verification questions accordingly if the call was transferred?



## Contact Information Confirmation - Did your agent ask for...

- The caller to spell their name?
- The caller's company name?
- The caller's telephone number?
- The caller's email address?





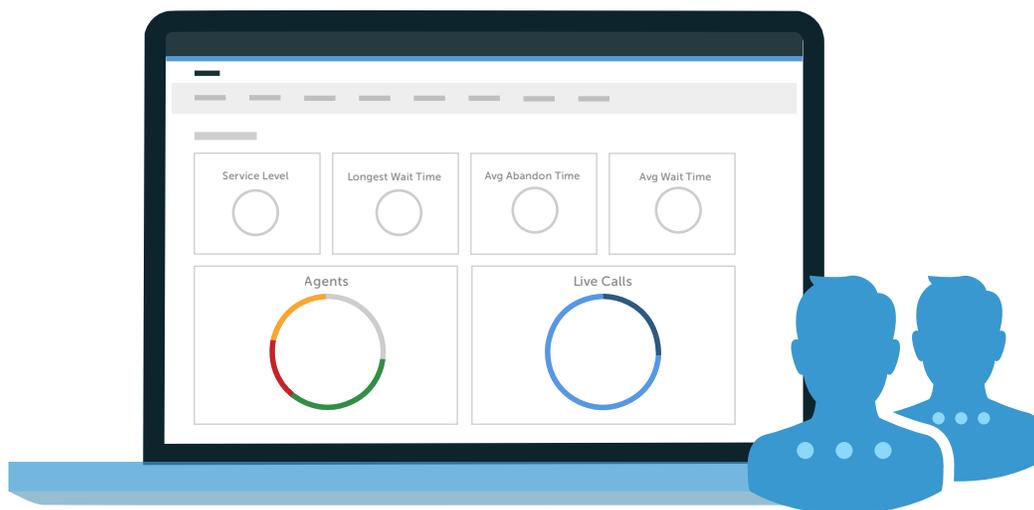
## Problem-Solving Abilities - Did your agent...

- Apologize for the issue and inconvenience associated with the problem?
- Take ownership of the problem?
- Ask pertinent questions to accurately diagnose the problem?
- Request the error code message from the caller?
- Use appropriate resources to address the issue?
- Provide the most appropriate solution?
- Inform the customer of the estimated timeline for resolving their issue?
- Inform the customer of relevant supporting documentation to help resolve the issue?
- Confirm that the issue was resolved or the transaction was complete?
- Address the caller's issue sufficiently?
- Provide a reference number to the customer after resolving their issue?



## Protocol Compliance - Did your agent...

- Document important information in the notes of the call?
- Receive prior authorization when negotiating prices, offering discounts or giving refunds?
- Quote the customer with the correct price for the product or service?
- Recommend the most appropriate product, service or pricing plan?
- Leverage upselling and cross-selling opportunities?
- Inform their colleagues of a new bug, issue or product defect?





## Call-Handling Skills - Did your agent follow correct procedures for...

- Placing the customer on hold?
- Transferring the call?
- Conferencing in a colleague?
- Escalating the call to a manager?



## Customer Service Quality - Did your agent...

- Use the caller's name throughout the call?
- Summarize the customer's main points before troubleshooting or offering a solution?
- Receive the caller's permission to place them on hold before doing so?
- Limit the duration of hold time to an appropriate amount?
- Mute the caller when appropriate?
- Answer the customer's question correctly?
- Transfer the call to a colleague, when necessary?
- Conference in a colleague, when appropriate?
- Adequately address the caller's needs?
- Transfer the call to a manager when the customer requested for them to do so?





## Call Center Etiquette - Did your agent...

- Use the proper pronunciation of the caller's name?
- Maintain proper tone, pitch, volume and pace throughout the call?
- Use courteous words and phrases?
- Adapt their approach to providing service to the customer based on the customer's unique needs, communication style and problem?
- Avoid long silences during the call?
- Avoid interrupting or talking over the customer?
- Remain confident throughout the call?
- Refrain from using complicated jargon?
- Have a friendly, polite and professional demeanor?
- Use active listening skills?



## Script Compliance - Did your agent...

- Adhere to the script?
- Adequately adapt their approach to interacting with the customer, within the scripts guidelines, when necessary?
- Deviate from script when necessary?



## Closure - Did your agent...

- Adhere to the call closure guidelines?
- Adhere to the call closure script?
- Set a follow-up appointment, if necessary?
- Ask the customer if they had any additional questions or issues before ending the call?
- Ask the caller if the service they were provided met their standards?
- Ask the caller if there was anything they could do to enhance their quality of service?
- Thank the customer for calling?



## Follow-Up - Did your agent...

- Follow up with customer within the agreed upon timeframe?
- Introduce themselves to the customer and provide the reason for their call?
- Adequately address the customer's questions?
- Adequately resolve the customer's issue(s), or provide a timeframe for resolution?

The above items should serve to guide you when developing quality monitoring scorecards for your call center. When careful consideration is taken in developing your call scoring evaluation form items, the reliability and validity of the form will be enhanced. This will result in more accurate data for evaluating call center agent performance and will improve the overall effectiveness of your quality monitoring practices.

### **How did you score?**

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