

Section A–Call Answer Time

CPS requires call to be answered by Live Agent in _____ Seconds

This information is specified by the Call Centre to meet each client's requirements. Call time is counted from the first ring and includes any auto answer or pre-screened message time.

5 - Call was answered within required time

0 - Call was not answered within required time

N/A Option

Section B - Answer Phrase

B1 Did the agent use proper / complete answer phrase? The answer phrase must contain all required words from CPS but may be modified in order of phrasing. The answer phrase was clear and understood.

5 - Agent completed answer phrase requirements

0 - Agent did not complete answer phrase requirements

Section C - Call Quality

C1 Pace & Enunciation

5 - Agent is fluid throughout the call and speaks at a pace that is easily understood

Enunciation is excellent throughout the entire call

3 - Agent is fluid throughout most of the call; somewhat understandable pace and/or enunciation was poor at times throughout the call

0 - Agent leaves long pauses, speaks too quickly or rushes the caller

Enunciation was poor throughout the entire call

C2 Brand for Customer / Tone of Voice

Tone of voice is to be evaluated based on the information provided by the Call Centre on the CPS for each client. Examples are: clinical...showing little or no emotion, friendly & interested. Customer Brand is Hip, Trendy, Ultra Professional

5 - Agent showed appropriate mood and genuine interest throughout the call

3 - Agent showed appropriate mood and genuine interest some of the time

0 - Agent did not show appropriate mood or genuine interest throughout the call

C3 Attitude

5 - Agent was proficient and professional throughout the call, appropriate to the account type.

3 - Agent remained composed and professional until conversation moved outside of agent's comfort zone.

0 - Agent was not proficient and professional throughout the call, inconsistent with account type

C4 – Grammar

NOTE: examples of slang: Yup, Yep, Nope, ya/yeah (instead of yes), Gonna/Gunna, Lemme, Okey Dokey, Ya (instead of you), All Righty, Uhhhh, Cool, Ain't, like (when used as a filler), bye-bye now, bu-buy, speak'in

"The CSR overused a word" means they repeated it to the point of distraction. Examples: Okay, Um, Alright, no problem, no worries, K, thanks, mmmmmm. Crutch words such as: so, well.

5 – CSR used proper business phrasing throughout the call, without slang, unprofessional verbiage or overuse of a particular word to the point of distraction.

0 – CSR used any slang term, unprofessional verbiage OR CSR overused a particular word to the point of distraction.

C5 Confidence

5 - Agent demonstrated confidence and appeared comfortable navigating the call

3 - Agent demonstrated a degree of confidence and appeared comfortable some of the time navigating the call

0 - Agent demonstrated little confidence or comfort in navigating the call

C6 Call Control: On some account types, the CSR must concentrate and look up information while also avoiding idle 'chit chat' with the caller. The CSR should let the caller know what they are doing so that it does not constitute 'dead air' to the judges.

5 - Agent guides the caller throughout ensuring that all appropriate questions are answered in a fluid manner

3 - Agent guides the caller throughout some of the call appropriately in a fluid manner

0 - Agent allows caller to take control, lead conversation, and ramble on or does not get answers to appropriate questions

Section D - Hold Management (If no hold, X is placed through this section)

D1 Were you asked politely / Did they wait for an answer?

2 - Agent asked caller politely to hold AND waited for the caller's reply

0 - Agent did not ask caller politely OR did not wait for the caller's reply

D2 Polite return from hold

2 - Agent returned to the call politely recognizing the hold

0 - Agent did not thank caller or recognize the hold

Section E - Call Management / Per Campaign / New List to be created for each

SEE New Section at bottom

E Transaction Requirements

The CPS form must be filled out specifically for every client, identifying fields that must be filled in and those that may be optional and/or identifying all information that must be relayed to caller.

5 - Agent completed CPS requirements

0 - Agent did not complete CPS requirements

Section F - Re-Assuring Close

The CPS form should contain the close criteria or a closing script. How do you want your agent to close the call?

F1 Did the agent follow the close criteria from the CPS meeting the client's expectations?

5 - Agent followed the close criteria

0 - Agent did not follow the close criteria

F2 Did you feel confident the transaction would be handled correctly?

5 – Overall, the agent made you feel confident that you were in good hands and that any actions required after taking the call would have been done correctly had this been a real call.

3 – Overall, the agent made you feel somewhat confident that you were in good hands and that any actions required after taking the call would have been done correctly had this been a real call.

0 - Agent did not make me feel confident that the correct actions would be taken.

Overall Customer Service Experience

1) Did the CSR sound engaged with the caller? (*Did the CSR sound appropriately concerned or compassionate or did they sound mechanical*)

5 – consistently engaged with the caller throughout the call

3 – engaged with caller through part of the call

0 – sounded mechanical or scripted

2) Did the CSR personalize by referring to the caller by name once during the call
Referring to the caller by name can be: first name, last name with Mr./ Mrs. / Ms, Doctor, Sir, Ma'am

5 – referred to the caller by name once during the call

0 - did not refer to the caller by name

3) How would you rate the overall 'impression' the CSR left with the caller? (*Did the CSR remain professional and interested at all times, leaving the caller to feel confident that their needs would be met?*)

5 – 100% confident needs would be met, CSR sounded professional, in control, and interested in the caller

3 – Reasonably confident, CSR sounded professional for the most part, maintained control some of the time, and demonstrated reasonable interest some of the time

0 – Not confident, CSR sounded unsure of themselves, or lost professional edge, or left the impression they were disinterested in the caller.

Each Account Type will provide a pick list for the participant to choose from regarding the specific information that the agent needs to gather in the CPS form.

Account Types:

- **Order Entry**
- Information needed:
 - first name
 - last name
 - telephone number
 - product number

- product description
 - delivery address
 - pick up address if applicable
 - payment method
 - email address
 - Other information as required
- **Help Desk / Tier One / Trouble Tickets**
- Information needed:
 - first name
 - last name
 - employee phone number
 - department
 - description of problem
 - description of solution
 - email address
 - Other information as required
- **Information Referral**
- Information needed:
 - first name
 - last name
 - telephone number
 - inquiry type
 - email address
 - Other information as required
- **National to regional mapping / dealer locate**
- Information needed:
 - first name
 - last name
 - current location
 - ending location
 - update time
 - telephone number
 - email address
 - Other information as required
- **Government / Utilities**
- Information needed:
 - first name
 - last name
 - address
 - telephone number
 - problem
 - email address

- time of day to call back
 - Other information as required
- **Crisis**
- Information needed:
 - caller information
 - description of situation/incident
 - call back number
 - escalation process
 - Other information as required
- **Property Management**
- Information needed:
 - first name
 - last name
 - telephone number
 - address
 - type of emergency
 - Other information as required
- **Incident Report**
- Information needed:
 - first name
 - last name
 - telephone number
 - location of incident
 - date & time of incident
 - description of incident
 - Other information as required