Agent Performance Scorecard

Complete once per review period from system reports, not memory. For each metric, enter the actual result, convert it to points using the target bands, and multiply by the weight. Weights must add up to 100%. Exclude time the agent spent in approved training, coaching or system outages from productivity metrics.

AGENT AND PERIOD

Agent name

Agent ID

Team lead / supervisor

Site / program / queue

Tenure band

☐ Nesting (0-30 days on floor) ☐ 31-90 days ☐ 91-180 days ☐ Over 180 days

Review period start

Review period end

Contacts handled in period

QA evaluations completed in period

POINTS SCALE (APPLY TO EVERY METRIC)

5 = Well above target (top band). 4 = Above target. 3 = At target. 2 = Below target. 1 = Well below target.

Set the bands for each metric before the period starts and publish them to agents. Example bands for QA score: 5 = 95% and above, 4 = 90-94.9%, 3 = 85-89.9%, 2 = 80-84.9%, 1 = under 80%.

For metrics where lower is better (handle time, absences), the bands run the other way.

QUALITY AND CUSTOMER METRICS

QA score average: target [85]% | actual | points 1-5 | weight [30]%

Customer satisfaction (CSAT) or NPS: target [__] | actual | points 1-5 | weight [20]%

First contact resolution (FCR) or repeat-contact rate: target [__]% | actual | points 1-5 | weight [15]%

Compliance auto-fails in period (any = 1 point): actual | points 1-5

EFFICIENCY AND RELIABILITY METRICS

Average handle time (AHT): target [__] sec, acceptable range +/- [10]% | actual | points 1-5 | weight [10]%

Schedule adherence: target [90]% | actual | points 1-5 | weight [15]%

Attendance (unplanned absences / occurrences): target [__] or fewer | actual | points 1-5 | weight [10]%

Optional program metric (sales conversion, collections, upsell): target | actual | points | weight

SCORE CALCULATION

Weighted score (sum of points x weight / 100), out of 5.00

Overall rating

☐ Outstanding (4.50-5.00) ☐ Strong (3.75-4.49) ☐ Meets (3.00-3.74)
☐ Developing (2.25-2.99) ☐ Below standard (under 2.25)

Rank within team (optional)

Trend vs previous period

☐ Improving ☐ Stable ☐ Declining ☐ First period

REVIEW CONVERSATION

Biggest strength this period (with data)

Priority metric to improve next period

Specific actions agreed (coaching, side-by-sides, refresher training)

Support the supervisor will provide

Context the agent wants on record (system issues, queue changes, leave)

Eligible for incentive / recognition this period

☐ Yes ☐ No ☐ Not applicable

Next review date

Agent signature (acknowledges review, not necessarily agreement)

Date

Supervisor signature

Date