Call Quality Monitoring Scorecard

Score each behavior Yes (full points), Partial (half points) or No (zero). Mark N/A only when the behavior could not apply to this call, and remove its points from the total possible. Any auto-fail item marked No sets the final score to 0 regardless of other sections. Quote the call (with timestamps) in the comments so the agent can find the moment.

CALL DETAILS

Agent name

Agent ID / employee number

Team / supervisor

Site / location

Evaluator name

Evaluation date

Call date

Call or interaction ID

Call length (mm:ss)

Channel

☐ Inbound voice ☐ Outbound voice ☐ Chat ☐ Email ☐ Social / messaging

Call type / contact reason

Evaluation type

☐ Random sample ☐ Targeted (low CSAT / complaint) ☐ Calibration call
☐ New hire / nesting review ☐ Side-by-side (live)

SECTION 1: OPENING AND VERIFICATION (10 POINTS)

Answered with the approved greeting, own name and company name within [3] seconds of connect (3 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Verified the caller's identity using the required [number] data points before discussing the account (5 pts, auto-fail if No)

☐ Yes ☐ No ☐ N/A

Used the customer's name at least once after verification (2 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

SECTION 2: DISCOVERY AND UNDERSTANDING (20 POINTS)

Let the customer explain the issue without interrupting (5 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Asked clarifying questions to find the real reason for the call (8 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Summarized the issue back to the customer and got agreement before acting (4 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Reviewed account history and prior contacts instead of asking the customer to repeat them (3 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

SECTION 3: RESOLUTION AND ACCURACY (30 POINTS)

Gave correct information consistent with current policy and the knowledge base (10 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Resolved the issue on this contact, or took every step available to the agent's role (10 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Set clear expectations on next steps, timelines and what the customer will receive (5 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Followed the correct transfer, escalation or callback process when needed (5 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

SECTION 4: COMPLIANCE (AUTO-FAIL ITEMS)

Read required disclosures word for word: [list, e.g. call recording notice, mini-Miranda, terms of sale]

☐ Yes ☐ No ☐ N/A

Handled payment card or sensitive data per PCI and privacy procedure (paused recording, no read-back of full numbers)

☐ Yes ☐ No ☐ N/A

Did not make promises, guarantees or statements outside policy

☐ Yes ☐ No ☐ N/A

Honored do-not-call, opt-out or cancellation requests as required

☐ Yes ☐ No ☐ N/A

Was professional throughout: no rude, dismissive or discriminatory language, no intentional disconnect

☐ Yes ☐ No

SECTION 5: COMMUNICATION AND SOFT SKILLS (25 POINTS)

Acknowledged the customer's situation with a specific empathy statement where appropriate (6 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Used clear, plain language with no unexplained jargon (5 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Kept a confident, friendly tone and controlled the pace of the call (5 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Asked permission before hold, gave a time estimate, and checked back within [60] seconds (5 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Avoided dead air longer than [10] seconds without explanation (4 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

SECTION 6: CLOSING AND DOCUMENTATION (15 POINTS)

Confirmed the issue was resolved or the next step was understood (4 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Offered further help and closed with the approved closing (3 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

Logged accurate disposition code and complete, readable notes (5 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

After-call work kept within the target of [__] seconds (3 pts)

☐ Yes ☐ Partial ☐ No ☐ N/A

SCORE SUMMARY

Points earned

Points possible (100 minus N/A items)

Final QA score % (points earned / points possible x 100)

Auto-fail triggered

☐ No ☐ Yes: final score set to 0

Result band

☐ Exceeds (90-100%) ☐ Meets (80-89%) ☐ Needs improvement (70-79%)

☐ Below standard (under 70%)

COACHING NOTES

What the agent did well (with timestamp)

One behavior to change first (with timestamp and the better phrasing)

Root cause of any miss

☐ Knowledge gap ☐ Skill / practice gap ☐ Process or tool issue ☐ Policy unclear
☐ Behavior / will

Coaching session date

Agent comments

Agent acknowledgement

Date

Evaluator signature

Date