



Call Handling Standards

for Agents to Deliver Great Customer Service

February 2022

A black and white photograph of several call center agents wearing headsets and working at their desks. The image is partially obscured by a yellow banner on the right side of the slide.

About SQM Group

"Specializing in helping call centers improve FCR, Csat, and cost – one agent at a time."

Software

mySQM™ FCR Insights software helps call centers measure, benchmark, track, and improve First Call Resolution. It features Personalized Intelligence™, an automated suite of tools that discovers effective opportunities for FCR improvement.

Research

SQM specializes in capturing, analyzing, benchmarking and reporting call center CX and EX. Our research team includes doctorate level researchers, and software engineers to help with any of your survey questions, data capture, interpretation of results and how-to action.

Awarding

SQM FCR Awards recognize top-performing organizations and agents for demonstrating customer experience excellence. Our awards are unique because they are based on feedback from call center customers and employees.

Facts About SQM Group

Our knowledge of customer experience is unsurpassed and enables us to provide unique insights into developing and implementing world class customer service best practices

500+

The number of leading North American contact centers SQM benchmarks on an annual basis

1996

Founded in 1996, SQM is a leading North American research, consulting, and performance awarding firm for customer experience

1,500,000+

The number of surveys SQM conducts annually with customers who have used a call center, email, website, or IVR contact channel

25,000+

The number of surveys SQM conducts annually with employees who work in contact centers

Demographics

Benchmarking participation is
71% American
26% Canadian
3% International

Location

SQM does business in 15 countries around the globe including the US, Canada, Australia, India, Philippines, Chile, Mexico, Jamaica, Costa Rica, and Peru

Benchmarking

We can benchmark all your major contact channels against leading North American organizations

Satisfaction

SQM operates a 100+ seat call center with World Class Esat in Coeur d'Alene, Idaho and Vernon, British Columbia



Call Handling

Customer Experience Research

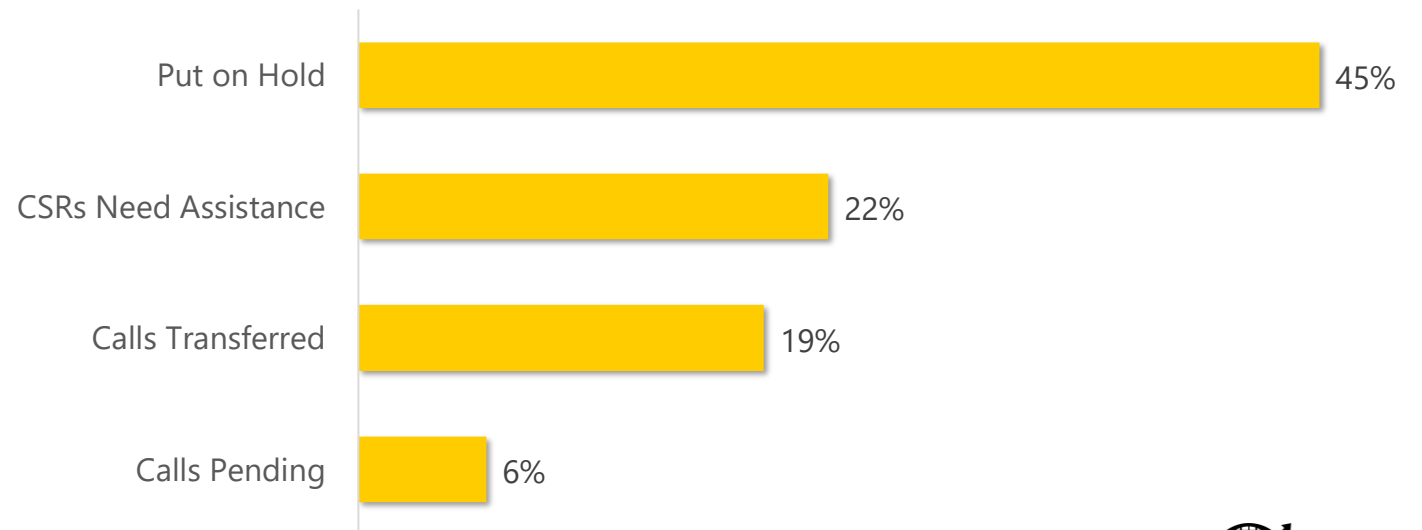
Call Handling CX Research is Based
on Benchmarking over 500 Leading
North American Contact Centers

Call Handling Metrics

Average Call Length is 6 minutes 45 seconds

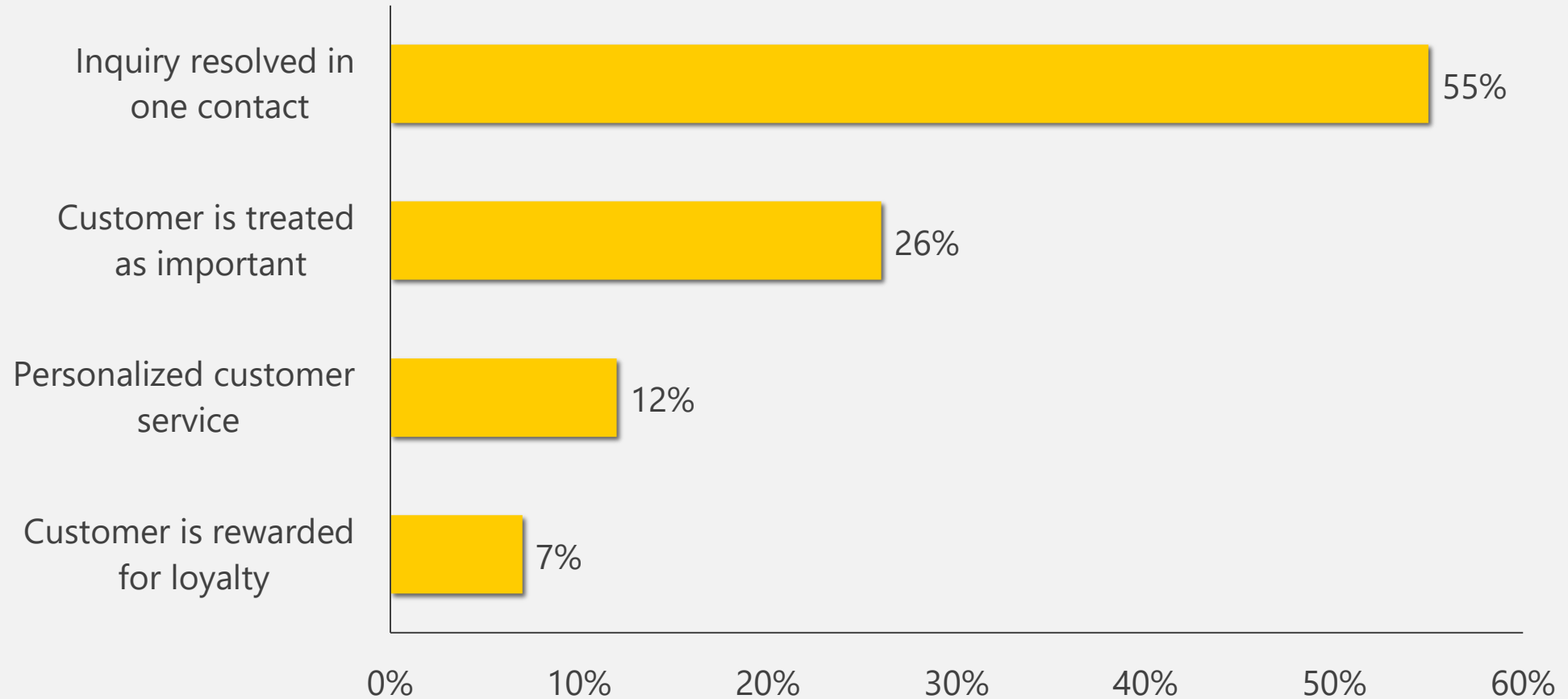
When the call is unresolved **40%** of customers felt the Agent could have done more to help

When FCR is not achieved the Agent is the source of error **39%** of the time



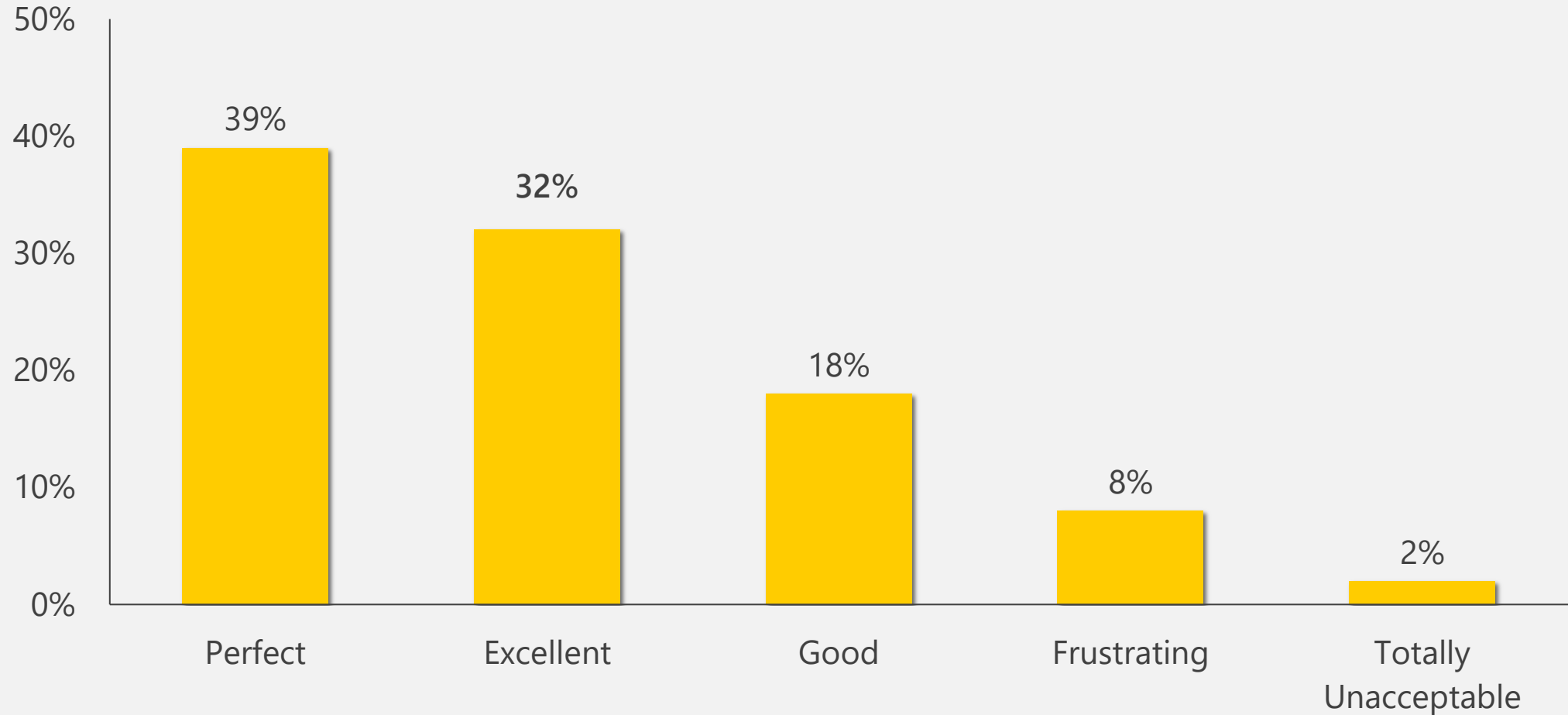
Most Important to Customers

What is Most Import to Customer's Interacting with a Contact Center?



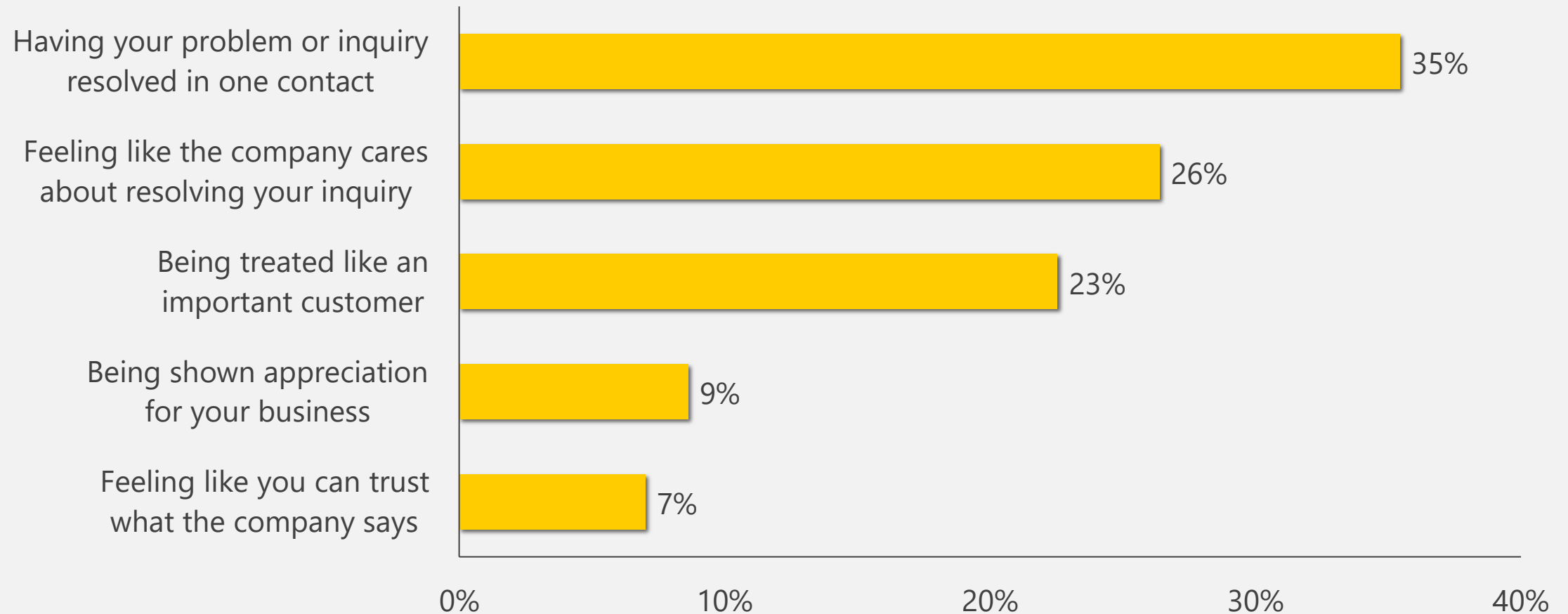
Customer Emotion Experience

Customer's Emotion Experience Using a Contact Center



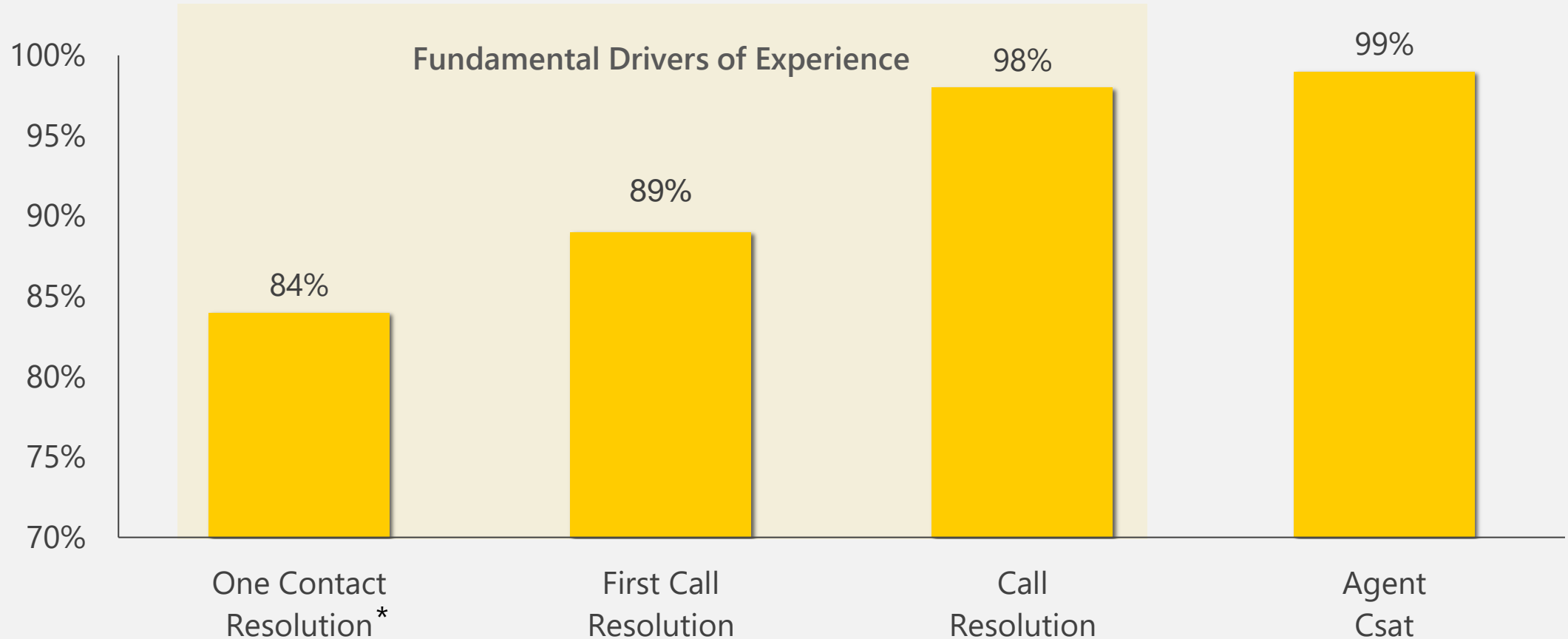
Customer Emotion Experience

Call Handling Practices that Create Positive Emotion Experience



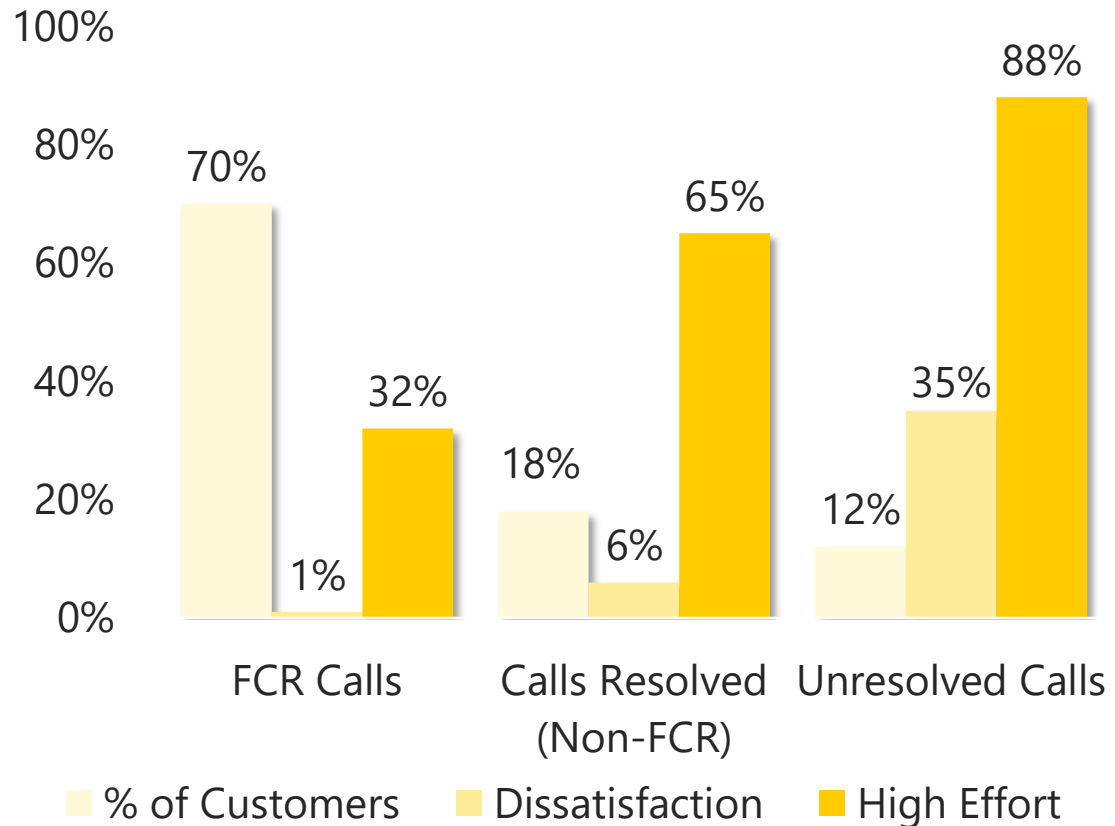
Customer Emotion Experience

What Creates a Perfect Emotional Experience?



* Customer used only one contact channel to resolve their issue on the first contact

Call Handling Impact on CX



For Every Additional Call Csat Goes Down 15%

Unresolved Calls Create a 23% Customer Defection Rate

Agent Call Handling is Fix 1st Targeted Opportunities for CX Improvement

Dissatisfaction: % of customers who are somewhat dissatisfied or very dissatisfied with their call center experience

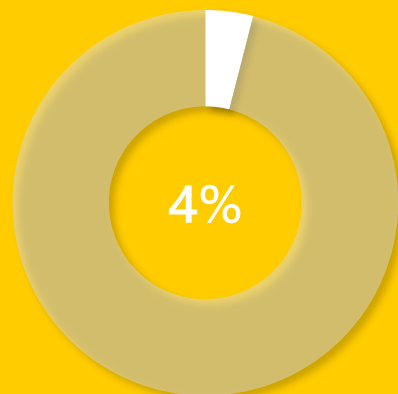
High Effort: % of customers who put forth moderate, high or very high effort to resolve/trying to resolve their inquiry



Note: Agents are the last line of defense

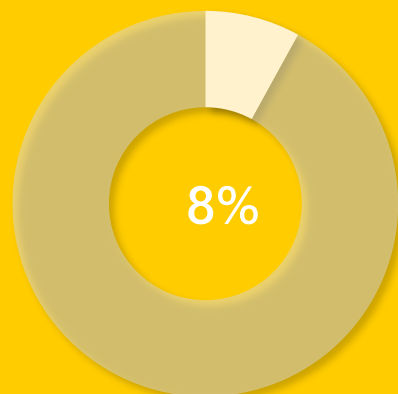
Agent Csat Performance

Impact on Customer Defections



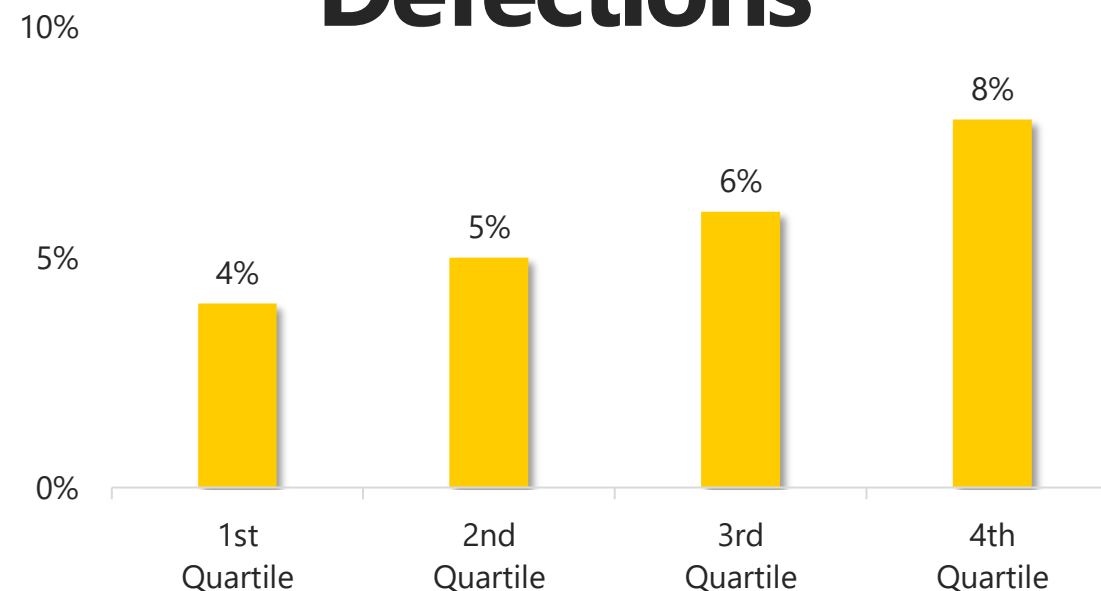
The Best Agents

The top 15% of Agents have an average of 4% customer defections.



The Worst Agents

The bottom 15% of Agents have an average of 8% customer defections.

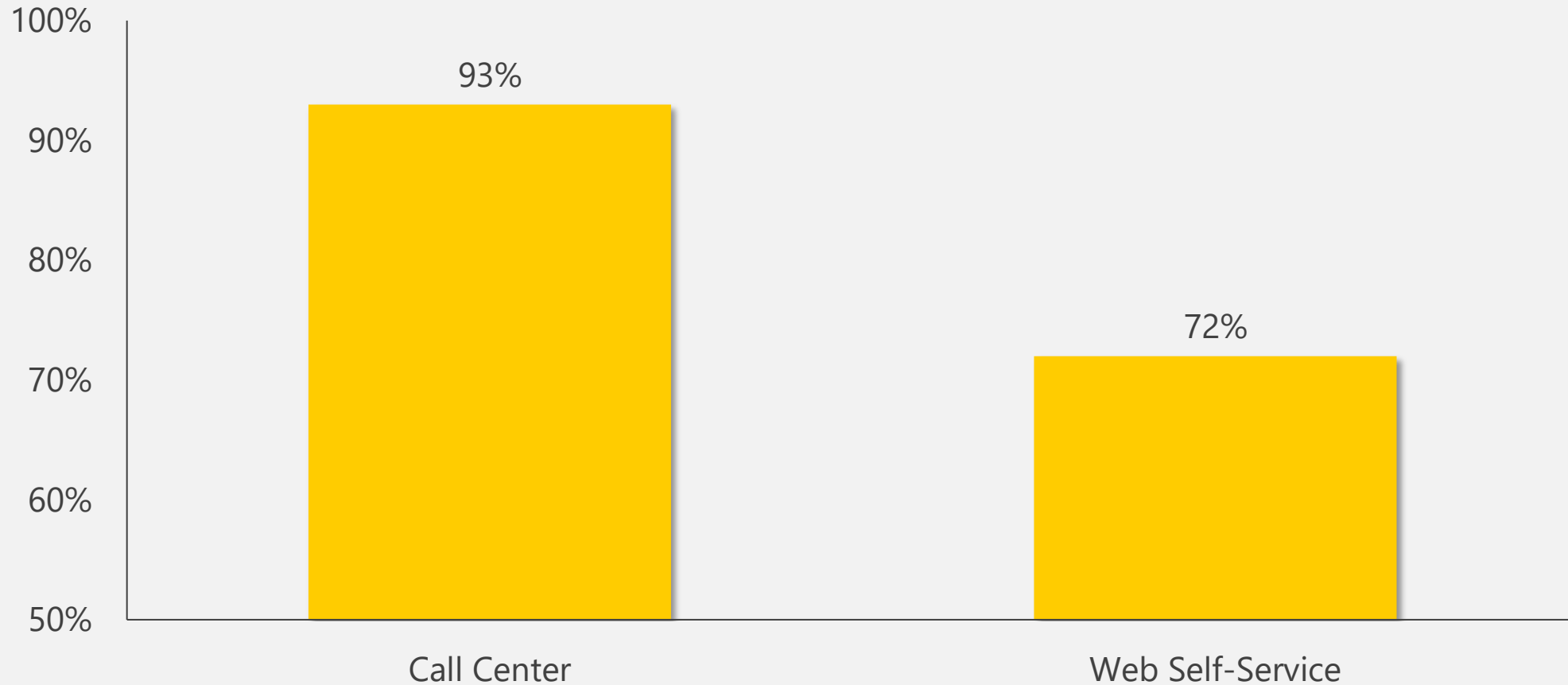


Agent Csat Performance Ranking

There is a **4% gap** between the top Agents and bottom Agents for customer defections.

Customer Expectation

Customers who Expected to Resolve their Inquiry in One Contact



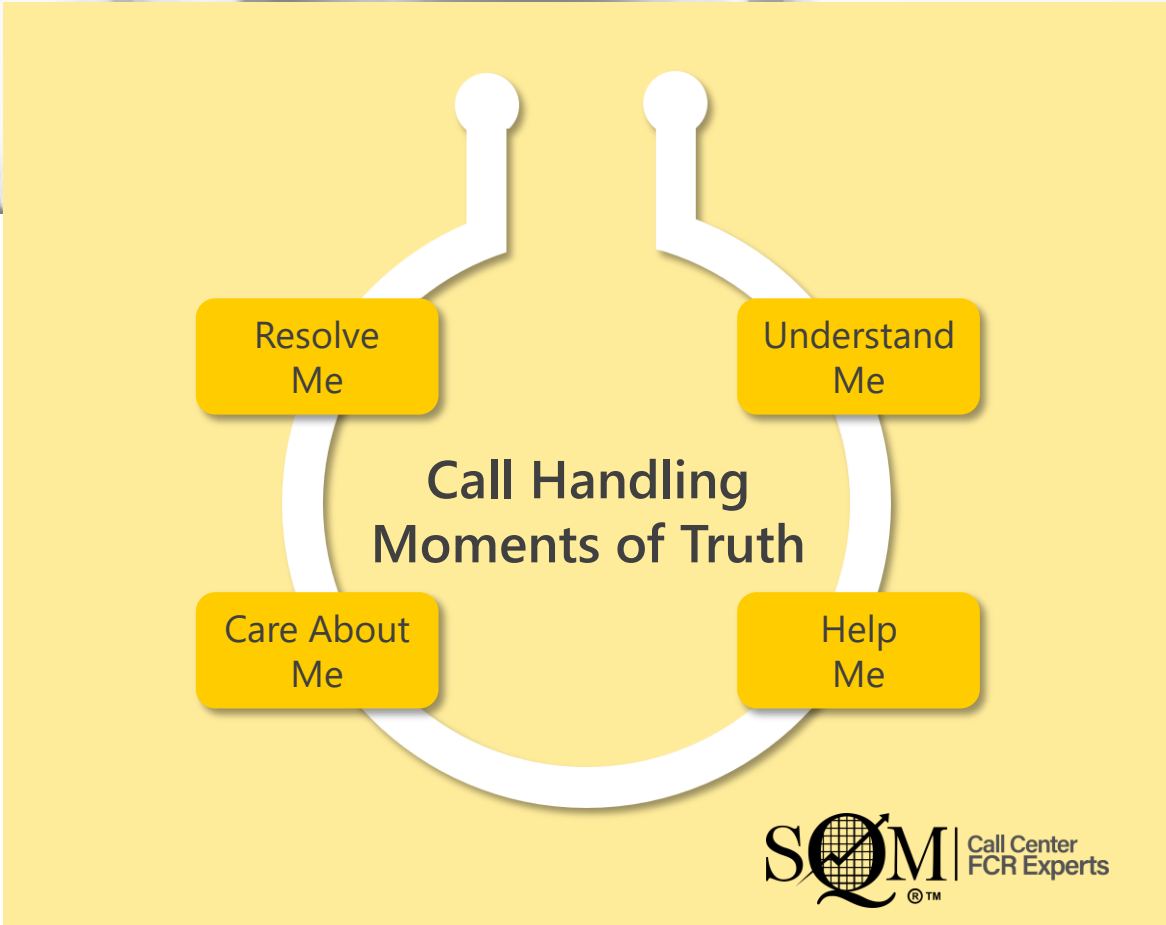


Call Handling Moments of Truth

Customer Most Important MoT Ranking

Ranking			
1	Resolve Me	0.64*	More Important ↓ Less Important
2	Help Me	0.60	
3	Care About Me	0.55	
4	Understand Me	0.35	

*Statistical Correlation for Importance



Call Resolution Delivery

Call Handling Standards Overview

- Agents and supervisors should do everything in their power to resolve a customer's call
- The Call Resolution Delivery (CRD) is modelled on four basic moments of truth that a customer wants an Agent to demonstrate on every call – Understand Me, Help Me, Care About Me and Resolve Me
- CRD are Agent call handling behavioral standards that a customer should experience for resolving an issue
- CRD defines the customer experience and suggests word choices that an Agent should use in order to be successful at resolving customer calls at world class level
- By understanding the moments of truth and call handling standards, an Agent is in a better position to deliver world class call resolution



Call Handling

Moments of Truth



Understand Me – Agent determines and confirms the reason(s) for the customer's call by actively listening, probing, and clarifying in order to ensure understanding as well as acknowledging call history and documenting the conversation



Help Me – Agent expresses and demonstrates willingness to help customer by letting them know that they can help them, providing accurate and complete information, keeping them focused on the inquiry, taking the necessary time to help the customer, and educating them with solution options



Care About Me – Agent uses a friendly, enthusiastic and warm voice tone, builds rapport, shows empathy for customer's situation, is patient and honest, and expresses appreciation for the customer's business



Resolve Me – Agent resolves customer's inquiry or problem by answering questions, solving problems, using authority and taking ownership, provides fair treatment, summarizes call, communicates next steps and confirms that the call is resolved





Call Handling Standards

for Agents to Deliver Great Customer Service

We define call handling standards, share associated behaviors, and we provide word choices and phrases for agents to deliver great customer service.

Call Resolution Delivery - Understand Me

Definition	Call Handling Behavior Standards	Word Choices or Phrases
Understands Reason For the Call – Agent determines the reason(s) for customer’s call	<ul style="list-style-type: none">• Agent starts the conversation with identifying the organization and themselves• Agent actively listens by probing, clarifying and confirming to ensure understanding• Agent confirms the reason why customer called by restating key words that the customer used• Agent uses closed-ended or open-ended questions to ensure the correct understanding• Agent probes to see if there are other issues that can be addressed on the call• Agent recognizes and acknowledges if the customer has called in previously for the same issue, especially if the caller volunteers that information• Agent makes a note of the reason why the customer called and, at the end of the call, uses that information to ask the customer if they have resolved the reason for their call	<ul style="list-style-type: none">• I can help you with the reason why you called• Open-ended questions begin with the 5 W's (why, who, what, where and when)• Closed-ended questions begin with words such as do, did, is, can, will and would• Is there anything else I can help you with?• I see that you have called in before about the same issue• Let me confirm my understanding of your specific issue...
Communication – Agent speaks clearly by using appropriate speed, volume and effective grammar	<ul style="list-style-type: none">• Agent uses terminology that the customer understands and avoids industry or organization-specific jargon• Agent speaks clearly by using appropriate speed, volume and effective grammar• Agent takes ownership to ensure proper communication	<ul style="list-style-type: none">• I am sorry• I don’t understand• Can you provide more information?
Listening – Agent actively listens to what customer says without interrupting	<ul style="list-style-type: none">• Acknowledges the customer's statement by repeating some of the key words they have mentioned• Uses interpretive listening with customers• Uses active listening with customers	<ul style="list-style-type: none">• I completely understand the reason why...• I completely understand your situation...• It sounds like you are unhappy with our billing• Use words to acknowledge listening (yes, okay, I see, I understand, hmmm and uh-huh)• You’re absolutely correct
Language – Agent speaks in the language that the customer understands	<ul style="list-style-type: none">• Agent speaks in the language the customer can understand• Agent speaks in the customer’s chosen language• Agent speaks clearly so customer can understand verbal communication	<ul style="list-style-type: none">• Which language would you like this conversation to be conducted in?• One moment, let me transfer you to a Agent that can speak (language)• It sounds like you may prefer to speak to a Agent that can speak (language)• Can you understand me?• Would you like me to speak more slowly, so that you can understand me better?

Call Resolution Delivery - Help Me

Definition	Call Handling Behavior Standards	Word Choices or Phrases
Helpful – Agent expresses and demonstrates willingness to help customer	<ul style="list-style-type: none"> Agent finds information customer is looking for Agent demonstrates willingness to help the customer Agent does everything they possibly can to resolve customer’s inquiry or problem Agent asks customer if there is anything else that they can do for them Agent uses KMT on every call Agent checks the background of previous calls Agent uses positive language in helping customer 	<ul style="list-style-type: none"> The information you are looking for... I am going to look up that information I am going to check with an expert to assist I will do everything I possibly can to resolve your issue I will ensure that... Is there anything else that I can do for you today? I am going to check your previous calls for information
Knowledge – Agent provides accurate and appropriate information	<ul style="list-style-type: none"> Agent is knowledgeable (e.g., provides accurate and/or appropriate information) Agent provides consistent and complete information Agent educates the customer and offers alternatives Agent is an expert on products and services 	<ul style="list-style-type: none"> These are some possible alternative solutions to your inquiry I can provide you with the answers to your questions
Call Length – Agent keeps customer focused on resolving the inquiry or problem	<ul style="list-style-type: none"> Agent takes necessary time to handle customer’s inquiry or problem Agent effectively manages call flow (e.g., screen navigation and use of proper sequencing of call-handling steps) Agent keeps customer focused by letting customer know when enough or the right information has been provided 	<ul style="list-style-type: none"> Did you...? Have you...? Thank you for providing the information I understand that you are very busy... I will quickly...
Confident – Agent sounds confident in what they are saying to the customer	<ul style="list-style-type: none"> Agent sounds confident in what they are saying to the customer Agent assures the customer that they made a good decision or choice Agent uses positive language 	<ul style="list-style-type: none"> I definitely can do that for you I will absolutely do that for you That sounds fantastic I will certainly get that done for you
Transfer – Agent transfers customer to the appropriate Agent in order to resolve customer’s inquiry or problem	<ul style="list-style-type: none"> Agent transfers customer upon their request to the appropriate Agent who can help them Agent provides the customer a reason why the call needs to be transferred Agent tells customer they are transferring them to a Agent who can help them Agent does a warm transfer to the appropriate Agent, or finds the appropriate Agent, and tells that Agent the customer's situation and then transfers customer 	<ul style="list-style-type: none"> I am going to transfer you to a Agent that can assist you Is it okay that I transfer you to a Agent that can assist you? I need to transfer you for this reason... I am transferring you to this Agent who can best meet your needs
Sales – Agent earns the right to sell and makes offers accordingly	<ul style="list-style-type: none"> Agent earns the right to sell and makes offers accordingly Customer is delighted to have been presented with an offer and believes that it is an extension of outstanding customer service Agent is selling on a needs basis not per quota basis 	<ul style="list-style-type: none"> I would like to make an offer that best meets your needs I see that you have... may I recommend... Will this meet your needs?

Call Resolution Delivery - Care About Me		
Definition	Call Handling Behavior Standards	Word Choices or Phrases
Greeting – Agent identifies organization and self by first name	<ul style="list-style-type: none"> Agent uses customer’s name in the beginning and/or at the end of the call Agent greets customer with a cheerful voice tone and maintains a warm voice tone for entire call 	<ul style="list-style-type: none"> Thank you for calling [organization name], my name is... how may/can I help you?
Build Rapport – Agent uses a friendly, enthusiastic and warm voice tone	<ul style="list-style-type: none"> Agent uses a warm voice tone and is friendly, polite, and enthusiastic Builds rapport with friendly small talk and makes customer feel welcomed Agent gives customer full attention during call by actively listening 	<ul style="list-style-type: none"> Yes, I see, uh huh... Go ahead... I’m listening... You sound (happy, frustrated, sad, angry) So glad you’ve called...
Empathy – Agent empathizes with customer’s situation by verbally acknowledging customer’s point of view	<ul style="list-style-type: none"> Agent empathizes with customer’s situation Agent verbally acknowledges customer’s point of view Agent is calm and patient in dealing with customer's issue When Agent can not completely agree with customer, they seek selective agreement opportunities 	<ul style="list-style-type: none"> I do understand the inconvenience you have faced... I completely understand (the reason why/your situation) I’m (very glad/so sorry) to hear that... I agree with your specific point on...
Appreciation – Customer expresses appreciation about the Agent or vice versa	<ul style="list-style-type: none"> Customer expresses appreciation for what the Agent did for them Agent expresses appreciation for the customer’s business Agent expresses appreciation for customer’s patience (e.g., getting back to them later than expected or advised) 	<ul style="list-style-type: none"> Thank you for your feedback Thank you for providing the information I appreciate your patience We appreciate your business with...
Customer Emotional Experience - Agent creates a very positive emotional experience for the customer	<ul style="list-style-type: none"> Agent treats customer like they are very important Agent expresses that they care about resolving customer inquiry Agent resolves customer inquiry or problem in one contact Agent makes customer feel like they can trust what they say Agent expresses their appreciation for customer business 	<ul style="list-style-type: none"> I will gladly take care of that I care about helping you... I will resolve your inquiry I will send you verification Thank you for your business
Live Hold – When customer needs to be put on hold, Agent uses live hold (avoids using the mute hold button when possible)	<ul style="list-style-type: none"> Agent puts customer on live hold (avoids using the mute hold button when possible) Agent fills the dead air by informing customer what task they are doing Agent advises customer, when necessary, how long task will take 	<ul style="list-style-type: none"> While I am working on your inquiry, I will be placing you on hold, but you can talk to me at any time I will take X minutes to... I will quickly... These are the steps I am taking...
Trust – Agent tells the customer the truth	<ul style="list-style-type: none"> Agent tells the customer the truth Customer believes Agent trusts their side of the story Agent gives customer a straightforward answer Agent gives the customer the benefit of the doubt 	<ul style="list-style-type: none"> I can see where the problem is I trust what you are saying to me


Call Resolution Delivery - Resolve Me


Definition	Call Handling Behavior Standards	Word Choices or Phrases
Resolution – Agent resolves customer’s inquiry or problem	<ul style="list-style-type: none"> Agent answered customer’s questions and solved customer’s problem Agent provided options to resolve inquiry or problem Agent uses CRM checklist to ensure the call is resolved Agent takes accurate and complete notes 	<ul style="list-style-type: none"> Did I answer all of your questions? Did I provide all the options to resolve your inquiry?
Authority – Agent uses or seeks out the necessary authority to resolve customer’s inquiry	<ul style="list-style-type: none"> Agent uses their authority level to resolve customer’s issue Agent advises customer when request exceeds authority level Agent seeks out the person who has the appropriate authority to resolve the customer’s issue 	<ul style="list-style-type: none"> I have the authority to... I will get the authorization to... I will get the appropriate person for authorization so I can resolve your inquiry
Ownership – Agent takes ownership for resolving customer’s inquiry or problem	<ul style="list-style-type: none"> Agent personally makes sure customer’s issue is resolved Agent personally checks to make sure customer’s issue or problem is being worked on Agent acts as an advocate for the customer when dealing with other employees, departments, etc. Agent provides concierge service when required to resolve the call 	<ul style="list-style-type: none"> What I can do for you right now is... I will personally check to see that your issue is being worked on What I’m doing for you right now is...
Fair Treatment – Agent provides customer with a believable, rational explanation for treatment	<ul style="list-style-type: none"> Agent provides customer with a believable, rational explanation for treatment Agent checks with their supervisor to ensure that the customer is treated fairly 	<ul style="list-style-type: none"> Let me check with my supervisor to make sure I have done everything I can I have done everything possible...
Summarizes the Call – Agent summarizes key information pertinent to resolving inquiry	<ul style="list-style-type: none"> Agent summarizes key information pertinent to resolving inquiry (is specific about what the Agent did during the call or is going to do) Agent ensures that customer understands by asking customer if they are clear on what was done or what is going to be done (especially if complex) 	<ul style="list-style-type: none"> Are you clear on what I did to resolve your call? Do you understand what is needed to be done to resolve your inquiry?
Follow Through – Agent ensures that follow through commitments are done	<ul style="list-style-type: none"> Agent commits to mutually agreed upon follow-up when necessary (e.g., for unresolved issues) Agent sends an email or calls customer confirming what will be done or what was completed Agent documents in detail what had taken place on the call, what they did, and next steps Agent follows up on unresolved calls that required fulfillment or research to ensure that the organization delivers on their commitments 	<ul style="list-style-type: none"> I will... I will ensure... I will follow up... That’s now been done We’ll be in touch if there are any problems
Next Steps – Agent ensures customer understands next steps that are needed to resolve inquiry	<ul style="list-style-type: none"> Agent communicates the next steps that are required to resolve the customer’s inquiry or problem Agent ensures that customer understands next steps and Agent manages customer’s expectations properly (does not under-promise or over-promise) 	<ul style="list-style-type: none"> These are the next steps... Do you understand...?
Confirming Resolution – Agent confirms that the customer’s call is resolved	<ul style="list-style-type: none"> Agent confirms that the customer’s call is resolved Agent does call wrap-up while the customer is on the phone 	<ul style="list-style-type: none"> Did I resolve the reason for your call today? Did I give you clear next steps or options to resolve your call today? Will that meet your needs? What do you think about ...?





THANK YOU

To learn more about CX improvement with
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