

Customer Service QA Evaluation Form

Agent: Name Evaluated By: Evaluator Name Date of Evaluation: Date CQA Evaluation Score: 100 Great

Customer Experience Section - 60 Points

Metric	Point Value	Evaluation
1. Customer Assessment		
A. Call Resolution (Subtotal: 30 Points)		
Resolved Call	<input type="text" value="30 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No Note: Choose One "Yes"
Unresolved Call, Org/Cust SoE	<input type="text" value="20 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Unresolved Call, Agent SoE *Critical Error*	<input type="text" value="0 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
B. Agent Csat (Subtotal: 20 Points)		
Very Satisfied	<input type="text" value="20 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No Note: Choose One "Yes"
Somewhat Satisfied	<input type="text" value="10 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Somewhat/Very Dissatisfied	<input type="text" value="0 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
C. Positive Experience (Subtotal: 10 Points)		
Positive CX	<input type="text" value="10 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Customer Experience Points Earned:		/60

Call Compliance Section - 40 Points

Metric	Point Value	Evaluation
2. Agent Ownership of Customer Issues		
A. Information Sharing (Subtotal: 8 Points)		
All key information was provided	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Asked pertinent questions to understand the issue accurately	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Use online knowledge management tool	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Made notes or tags reason of why the customer called	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Agent took clear and complete notes and entered them in CRM	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
B. Call Handling (Subtotal: 6 Points)		
Adhered to customer transfer or escalation guidelines	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Used appropriate resources and approach to address call reason	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Adhered to customer hold guidelines	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Maintained adherence to the script or guidelines	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Was efficient in handling the call (e.g., appropriate call length)	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
C. Customer Service Quality (Subtotal: 17 Points)		
Asked and confirmed if the call resolved	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Accurate information provided (prevented customer call back) *Critical Error*	<input type="text" value="3 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
All customer questions were answered correctly	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Summarized call main points (after-call work not required)	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Provided the most appropriate solution	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Thanked the customer for their business and told them they were valued	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Used the customer's name throughout the call	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Expressed empathy for the issue, inconvenience, or cost related to the issue	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Took ownership for resolving call reason	<input type="text" value="3 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
3. Agent Ownership of Business Issues		
A. Security (Subtotal: 5 Points)		
Verified call access to account information *Critical Error*	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Updated or confirmed account information (e.g., email, phone #, address)	<input type="text" value="1 Point"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Adhered to government laws (e.g., HIPAA) *Critical Error*	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
B. Selling of Products and Services (Subtotal: 4 Points)		
Leveraged upselling and cross-selling opportunities	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Charged correct fees (did not waive fees or under-charge) *Critical Error*	<input type="text" value="2 Points"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Call Compliance Points Earned:		/40

Customer Service QA Scoring Range:

Great: 100 Points Good: 90-99 Average: 70-89 Needs Improvement: 50-69 Unacceptable: 0-49

Critical Error - If an agent makes a critical error, they receive 0 points for their entire Customer Service QA.

