Use this basic call evaluation form as a model

The question put to Customer Service Newsletter’s “Ask the Panel” team in the February issue was, “What are some ways in which we can improve our reps’ average handle time without diminishing the service we provide to customers?” Here’s some additional advice on evaluating monitored calls to improve handling from one of our panelists.

One way to promote consistent call quality and thus a consistent handle time among customer service reps is to create a call evaluation form that can be easily incorporated into a training and evaluation program. According to Jeanne O’Brien of Mile Hi Foods, “This will ensure that call movement is fluid, and questions and conversation are purposeful.” Following is an example of a call evaluation form that covers five basic call points.

**Point One: The Greeting.** A positive greeting provides immediate personal identification, when followed by an immediate action question it will provide forward momentum.

- “How may I assist you today?”
  Because the question requires a response other than “yes” or “no” from the caller. It provides the CSR with the immediate information.

**Point Two: The Initial Response Statement.** Using the information in Point One, the CSR is able to restate the customer’s stated purpose for the call with appropriate empathy or energy, followed by a probing question or resolution question.

- “I am sorry that your September invoice is incorrect. Let’s take a look at your latest statement and determine what has happened. May I have your account number please?”
  - “I am sorry that your magazine did not arrive on Tuesday. May I send a replacement to your home?”
  Again, questions move the call forward and lessen the opportunity for escalation as a result of anger or misunderstanding.

**Point Three: Scripted Clarifying/Probing Questions.** Having a few prepared questions, based on typical call types, assists CSRs to more clearly understand a customer’s opening statement and will prevent misunderstandings and reduce discovery times.

- “Tom, I apologize that your widget arrived damaged. I will certainly take care of this for you. Would you have the invoice number from the packing slip?”
- “Tom, I am sorry that your widget arrived damaged. I know you needed this item for your January Seminar. I will overnight a replacement to you if that will assist. Tom, was the box damaged as well as the widget inside the box?”

**Point Four: Resolution Statement and Question/Issue Closure.** Use a resolution statement to elicit customer acceptance or continued concern. This is particularly effective with difficult-to-satisfy callers to avoid unneeded escalation should the caller not be satisfied with the stated resolution.

- “Mr. Richards, if I reduce your payment by 10% in October and divide the balance into 3 monthly payments will you be able to handle the balance on schedule?”
- “Ms. Thompson, I have sent a replacement unit to the Livingston Store, with an acknowledgement of our responsibility to meet the deadline. Will this action be satisfactory for your company?”

**Point Five: Appreciation Statement.** Can’t get that caller off the line? Are your associates comfortable closing a call with a talker? Be sure to train on effective appreciation statements to end the call.

- “Mr. Robinson, it has been a pleasure talking with you today. I know you will enjoy your new service. Please call again if we can assist you further.”
- “Mrs. Brios, I appreciate the information you have shared. I will research the events you have questioned and contact you on Wednesday by 4:30 p.m. Have a nice afternoon. Thank you for calling.”

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