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## Quality Call Monitoring Form

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**Employee:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Customer:** \_\_\_\_\_

### Point Scale:

1. Unacceptable 2. Needs Improvement 3. Approaching Expectations 4. Meeting Expectations 5. Mastery

#### A. OPENING ON A POSITIVE NOTE

**35% Weight**

**1 2 3 4 5**

- Uses American West Standard Greeting with energy and enthusiasm
  - “Thank you for calling American West (spoken with energy and enthusiasm) My name is Michelle. How may I help you?”
    - Answered the call ready to serve and offered assistance, “How may I help you?”
    - Identified self by name
    - Asked for customer’s name “May I ask who I am speaking with?” or “I can certainly help you with that. May I ask who I’m speaking with? Great, Lauren, do you happen to have a tracking number?”
    - Spoke with energy and enthusiasm

*Multiply rating by “7” to get total score* **Score** \_\_\_\_\_

#### B. PROFESSIONAL ETIQUETTE

**35% Weight**

**1 2 3 4 5**

- Used the customer’s name at least once
- Says “please” and “thank you”
- Speaks in complete sentences
- Avoided sounding distracted and thinking out loud
- Proper hold procedure:
  - Asked for permission to place caller on hold
  - Said, “Thank you for holding.”
  - Kept customers apprised during extended hold times
  - Worked to keep hold to a minimum. (Hold times cannot exceed 3 minutes)
  - After no more than 3 minutes, checked back with the customer, thanked them and provided an update: “Thank you for holding Michelle. I’m trying to reach an agent...”
- Yielded to customer to avoid over speaking/allowed caller to finish statement before further speaking
- Avoided using casual language
- Maintained fluidity during the call

*Multiply rating by “7” to get total score* **Score** \_\_\_\_\_

**C. EMPATHY, ACKNOWLEDGMENT, ASSURANCE**      **15% Weight**      **1 2 3 4 5**

- Demonstrated empathy when appropriate
- Used empathic listening skills
- Offered acknowledgement statements when appropriate: "I see." "I understand your concern." "I am happy to check the status of your shipment for you."
- Assured customer to establish trust when appropriate
- Established a friendly interaction to enhance customer experience and give a sense of connection
- Spoke in a friendly, courteous and helpful tone throughout call

*Multiply rating by "3" to get total score*      **Score** \_\_\_\_\_

**D. SERVICING THE CALL**      **10% Weight**      **1 2 3 4 5**

- Employee demonstrated knowledge of offerings and clearly explained offerings
- Spoke specifically (i.e. instead of "it" will arrive on June 12<sup>th</sup>." Says something similar to "Your shipment will arrive in Tulsa on June 12<sup>th</sup>.")
- Breaks bad news to customer in a positive manner ("This is no more acceptable to us than it is to you." Or "I know you were looking forward to getting this today...")
- Established time expectations of 20 minutes to return a call (or kept customer in the loop when a 20 minute answer is not possible)
- Proactively assisted customer considering all segments of the supply chain (Not giving out agent phone number to customer, but calling agent for customer, verifies contact information, address, tractor trailer accessible, receiving hours, put notes in of all important information, etc.)
- Avoided industry jargon and terms
- Used partnership language. Instead of saying, "I don't know" say something similar to, "The best person to answer that question is dispatch. May I place you on hold while I try to reach them?"

*Multiply rating by "2" to get total score*      **Score** \_\_\_\_\_

**E. ENDING ON A POSITIVE NOTE**      **5% Weight**      **1 2 3 4 5**

- Assertively brought the call to a close; didn't wait for the customer to close the call
- When relevant, recapped and provided any next steps with details so that customers are clear and feel confident in company's ability to ship quickly and accurately
- Thanked customer for their business
- Closed the call with warmth and friendliness in vocal tone
- Closing similar to:
  - "Have I answered all your questions? Thank you for your business. My name is Michelle and it was my pleasure serving you today."
  - "Is there anything else I can do for you today? Well, the only thing left is for me to wish you a great day!"

*Multiply rating by "1" to get total score*      **Score** \_\_\_\_\_

**Total Score** \_\_\_\_\_

**COMMENTS:**

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