



# Asking the Right Qualitative Questions with Your QA Scorecard

Your quality assurance scorecard directly influences your [customer satisfaction](#). To ensure you are providing exceptional service at every touchpoint, you must make sure your employees are performing to expectation. Once you've set and trained your agents on your quality standards, it's time to evaluate and reinforce those performance expectations with [quality review and coaching sessions](#).

These sessions can be made especially productive by utilizing a scorecard that dives into the qualitative specifics of how an agent's behaviors and actions influenced the customer experience. Direct, collaborative, and improvement-focused quality coaching can only be achieved when a comprehensive scorecard is available to drive the conversation across the evaluation points that matter.

While every organization is unique, there are a series of universal critical quality indicators sure to move customer service in the right direction. **Does your quality assurance scorecard consider these qualitative measures?**

## Customer Greeting

Was the customer greeted in a way that set the interaction up for success? Regardless of channel, first impressions are everything. Establishing a friendly relationship at the start of the conversation is critical to building the trust and brand loyalty you want to emerge from the interaction.

### Areas to Consider:

- Soft skills
- Customer reaction
- Self-introduction
- Script adherence

## Agent Response Quality

Did your agent use the customer's name in conversation? Did they acknowledge the customer's feelings, and did they take all possible measures to provide everything the customer needed? Was the concern resolved and did the agent provide additional product or service recommendations to further improve the customer's experience with current products? Swift, friendly, effective, and revenue driving responses are the key to reaching your QA goals.

### Areas to Consider:

- Personalization
- Empathy
- Transparent communication
- Effectiveness
- Articulation (spoken & written)
- Upselling
- Active Listening (call-specific)
- Time to response (chat & email-specific)

## Communication Comprehension and Efficiency

An agent may have the perfect solution to a customer's needs, but if that solution is not communicated effectively, the agent's efforts will be for naught. Did the employee fully understand what the customer needed and summarize the customer's questions or request? Did the agent use appropriate language and depict the company's tone of voice? Was the agent able to de-escalate points of tension in the interaction? Were questions asked clearly and services provided with all details required to reach solutions?

Across all channels, confirming that the customer and agent are on the same page and making the customer feel heard and understood before taking the next steps will ensure efficiency for time savings and an [improved customer experience](#).

## Process & Resource Utilization

To accurately evaluate your agent's process and resource utilization, you must first be sure you have developed comprehensive quality delivery resources, such as quality training, call scripts, an [effective knowledge management system](#), etc. You cannot gauge performance in this realm if you have not provided the foundation required.

With the right resources in place, you should be able to answer, "Yes" to these questions: Did the agent follow appropriate processes and research the customer to track applicable case history? Were user verifications carried out, escalations managed, and ticket directed appropriately? If you have done the work to build an efficient foundation for your agents, you should consistently see good scores across these measures.

## Interaction Outcome

We have arrived at the most highly anticipated point in the quality assessment: the outcome. Was the customer interaction successful, will the customer contribute to a positive NPS, and remain loyal to your organization? The answers to these questions will heavily rely on whether the agent took ownership of the interaction and the customer's concerns, their level of proactivity, and the time to and success of the resolution.

### Areas to Consider:

- Clarity
- Grammar
- Tone of voice
- [De-escalation technique](#)
- Customer connection
- Engagement

### Areas to Consider:

- Process adherence
- User verification
- Ticket & information log accuracy
- User case history
- Escalation management

### Areas to Consider:

- Interaction ownership
- Proactivity
- Resolution

Learn more about how quality affects [customer satisfaction](#) in your call center and request [more information](#) about how to improve your quality assurance program.

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