Best Practice Scorecard Templates
- for call center professionals

These Scorecard Templates have been built from years of experience helping call centers to take the quality of their customer experience to the next level.

Every organisation and product offering is different and so these scorecards are to be used as a guide only.

Scorebuddy
QUALITY SCORING SYSTEM

Our customer success team have gathered what we think are best practice examples of how some of our clients have designed their QA scorecards, you can see that they address different channels and priorities. These samples are intended as guides, your business requirements will be different but we hope they give you direction and food for thought.

Most interactions with customers follow a typical flow, you can identify segments in the process and treat them as sections in your card, alternatively you can use sections as attributes or behaviours, perhaps soft skills. With Scorebuddy what you measure is your choice and it should reflect your customers and business priorities.

You will also notice that some of the questions are broad, Scorebuddy allows detail to be added at a question level when evaluating, trapping the comment for the agent and the root cause of the poor result for review and analysis later.

Please feel free to take a trial of Scorebuddy and the team will help you if you have any questions.

Derek Corcoran
Founder & CEO, Scorebuddy

Scorecard Templates
Customer Experience

This is an example of a customer experience focused email scorecard, it is what we all a 'Success Card' as it is looking at pass and fail percentages, it has blind scoring switched on and displays the outcomes as the percentage in each category Yes/No. It rewards, soft skills, adaptability, ownership, efficiency and compliance.

https://www.cloud.scorebuddyqa.com/scorebuddy

DASHBOARDS   SCORE ▾   STAFF   SCORECARDS   CALIBRATION   REPORTS   ANALYTICS   INBOX **1**   YOUR NAME ▾

Scorecard: **Customer Experience (Success Scorecard)**

	QUESTION	COMMENT / CAUSES	ANSWERS
	Compliance		
1	Did the advisor comply and inform customer about GDPR ?		◉ Yes ○ No
2	Did the advisor comply with data protection ?		◉ Yes ○ No
	Customer Experience		
3	Did the advisor use the relevant soft skills?		◉ Yes ○ No
4	Was the advisor professional during the interaction with the customer?		◉ Yes ○ No
5	Did the advisor customize the communication?		◉ Yes ○ No
6	Was accurate and clear information provided?		◉ Yes ○ No
7	Did the advisor take ownership of the interaction?		◉ Yes ○ No
	Internal Process		
8	Did the advisor comply with our internal call handling procedure?		◉ Yes ○ No
9	If there was an escalation, was it correct process followed?		◉ Yes ○ No
10	Did the advisor handle the interaction in a time efficient manner?		◉ Yes ○ No
11	Were the relevant case notes logged?		◉ Yes ○ No
12	Did the advisor use correct grammar and/or etiquette?		◉ Yes ○ No

Sections	Yes	No	Yes %	No %
Compliance	2	0	100%	0%
Customer Experience	5	0	100%	0%
Internal Process	5	0	100%	0%

Scorecard Templates
Phone

This scorecard is designed to assess a phone call, you can see that the behaviours being looked for are enthusiasm, politeness and respect, ownership, confidence, good communication, and ability to follow procedure. The skills being sought are; ability to deescalate a problem, operate within the SLA and record appropriate after call notes. It gives a numeric score with each question weighted for importance resulting in a total % of the maximum available score.

https://www.cloud.scorebuddyqa.com/scorebuddy

DASHBOARDS   SCORE ▾   STAFF   SCORECARDS   CALIBRATION   REPORTS   ANALYTICS   INBOX 1   YOUR NAME ▾

Scorecard: Phone

ID	QUESTION	COMMENT / CAUSES	ANSWERS	SCORE
	Call Etiquette			
1	The agent is positive and enthusiastic?		◉ Yes ○ No	5
2	Agent is polite and respectful?		◉ Yes ○ No	5
	Communication Skills			
3	Communicates with empathy		◉ Yes ○ No	5
4	Demonstrates ownership and confidence		○ Yes ◉ No	0
5	Applies effective de-escalation skills		○ Yes ◉ No	0
6	Communicates clearly and professionally		◉ Yes ○ No	5
7	Avoids long silences or hold time		◉ Yes ○ No	4
	Call and Case Procedures			
8	Was the call handled within SLA?		◉ Yes ○ No	10
9	Clear and accurate data captured on the case.		◉ Yes ○ No	10
10	Did the agent follow account verification procedures?		◉ Yes ○ No	20
	Product Competencies			
11	Correctly identifies the root of the issue through full investigation. (Open ended q's)		○ Yes ◉ No	0
12	Used effective troubleshooting and proper resources. Ex (Tools,KB)		◉ Yes ○ No	6
13	Provided accurate and relevant information		◉ Yes ○ No	6
14	Offered correct resolution		◉ Yes ○ No	7
Pass		Numeric 83	Percentage	83%

Scorecard Templates
Chat

This non numeric chat scorecard focuses on speed of response, preparation, concise communication, accuracy, courtesy and grammar along with adherence to process. Although there is a numeric value with weightings behind the scenes the agent and evaluator do not see the score, only that they have achieved an overall score within a scoring band. 'Getting there' and for each section.

https://www.cloud.scorebuddyqa.com/scorebuddy

DASHBOARDS   SCORE ▾   STAFF   SCORECARDS   CALIBRATION   REPORTS   ANALYTICS   INBOX **1**   YOUR NAME ▾

Scorecard: **Chat (Non-Numeric)**

ID	QUESTION	COMMENT / CAUSES	ANSWERS
	Chat Handling		
1	Was the advisor ready for the chat and promptly greeted the customer?		⦿ Yes ○ No
2	Did the advisor ask relevant probing questions ?		⦿ Yes ○ No
3	Was the chat handled in an effective and concise manner?		⦿ Yes ○ No
4	Did the advisor educate the chatter on relevant products or processes?		⦿ Yes ○ No
5	Did the advisor set correct expectations to the customer about next steps, if appropriate, including accurate time frames?		⦿ Yes ○ No
6	Did the advisor thank the customer and offer further assistance at the end of the chat?		⦿ Yes ○ No
	Resolution		
7	Did the advisor provide accurate information?		⦿ Yes ○ No
8	Did the advisor correctly answer the chatter's query?		⦿ Yes ○ No
	Rapport Building		
10	Was the advisor polite and courteous?		⦿ Yes ○ No
11	Did the advisor use the correct spelling, punctuation and grammar?		⦿ Yes ○ No
12	Did the advisor demonstrate empathy/willingness to help?		⦿ Yes ○ No
13	Soft Skills Superhero?		⦿ Yes ○ No
	Process		
14	Did the advisor escalate the query correctly and explain the process to the customer?		○ Yes ⦿ No
15	Did the advisor capture clear, concise & accurate information in the ticket including internal notes for next advisor?		○ Yes ⦿ No
16	Did the advisor use relevant tools?		⦿ Yes ○ No

<div align="right">Getting there</div>

Sections	Non-Numeric
Chat Handling	You're a **Quality Star**
Resolution	You're a **Quality Star**
Rapport Building	You're a **Quality Star**
Process	**Need Development**

Scorecard Templates
Compliance

This standard numeric scorecard focuses on compliance as the client is in a regulated industry, here process and accuracy are important to the business outcome and possible to the risk profile of the interactions.

---

https://www.cloud.scorebuddyqa.com/scorebuddy

DASHBOARDS   SCORE ▼   STAFF   SCORECARDS   CALIBRATION   REPORTS   ANALYTICS   INBOX **1**   YOUR NAME ▼

Scorecard: **Compliance**

	QUESTION	COMMENT / CAUSES	ANSWERS	SCORE
	Compliance adherence			
1	Account validation process was correctly complied with.		⦿ Yes ○ No	4
2	Properly completed product complaint process.		⦿ Yes ○ No	4
3	Followed GDPR.		⦿ Yes ○ No	4
4	Followed the complete internal process.		⦿ Yes ○ No	4
	Issue Resolution			
5	Cancellation completed as requested.		⦿ Yes ○ No	2
6	Understood and correctly managed the query.		○ Yes ⦿ No	0
7	Correctly completed all system processes.		○ Yes ⦿ No	0
8	Issue properly escalated (when necessary).		⦿ Yes ○ No	1
	Soft SKills			
9	Demonstrated appropriate communication skills.		⦿ Yes ○ No	4
	Call Management			
10	Handled customer interaction efficiently.		⦿ Yes ○ No	2
11	Properly documented the interaction.		○ Yes ⦿ No	0
	Business Intelligence			
12	Could the interaction have been avoided?		○ Yes ⦿ No	0

Below Target		Numeric	25	Percentage	83%

Sections	Total	Percentage
Compliance adherence	16	100%
Issue Resolution	3	50%
Soft SKills	4	100%
Call Management	2	50%
Business Intelligence	0	0%

Multichannel? Try Anychannel!

Use Scorebuddy to **Quality Assess** Calls, Chat, Email, Social Media, white-mail... anything.

www.scorebuddyqa.com

VISIT THE WEBSITE