POLICY DOCUMENT: CALL QUALITY SCORING & EVALUATION CRITERIA

Organization: NA Telecommunications & Internet Services
Department: Quality Assurance (QA)
Document ID: QA-POL-2025-01
System: VocalMind AI Analytics
Version: 1.0
Effective Date: 10/2/2026

1.0 Overview

This document outlines the methodology used by the **VocalMind AI** system to evaluate agent performance. VocalMind analyzes 100% of recorded calls, transcribing audio into text and assessing compliance, sentiment, and behavioral patterns. This objective scoring model ensures fairness, consistency, and high standards of customer service.

2.0 Overall Call Score (0 – 5.0)

The **Overall Call Score** is the primary metric for agent performance. It is a weighted average calculated from five core competency sub-scores and the mandatory compliance checklist.

Rating Bands:

Score Range	Classification	Definition
4.5 – 5.0	**Excellent**	Flawless execution. High empathy, perfect compliance, and efficient resolution.
3.5 – 4.4	**Good**	Meets expectations. Minor coaching opportunities (e.g., filler words), but issue resolved professionally.

2.5 – 3.4	Needs Improvement	Below standard. Missed empathy cues, slow resolution, or minor policy errors.
< 2.5	Critical	Failure. Major compliance violation, rudeness, or inability to solve basic issues.

3.0 Sub-Score Breakdown

3.1 Compliance Score (0 – 100%)

This is a binary checklist. The AI listens for specific required phrases or actions. There are 10 items, each worth 10%.

Scoring Tiers:

- **Green (Pass):** ≥ 90%
- **Amber (Warning):** 70% – 89%
- **Red (Fail):** < 70% (Automatically flagged for Supervisor Review)

The 10-Point Checklist:

1. **Proper Greeting:** ("Thank you for calling...", Agent Name).
2. **Recording Notification:** ("This call may be recorded...").
3. **Identity Verification:** (3-point check completed).
4. **Privacy Disclaimer:** (Stated before accessing account data).
5. **Empathy Statement:** (Acknowledged customer issue/emotion).
6. **Troubleshooting Protocol:** (Followed standard diagnostic steps).
7. **Hold Protocol:** (Asked permission before hold/transfer).
8. **Resolution Summary:** (Recapped issue and fix).
9. **Additional Assistance:** ("Is there anything else I can help with?").
10. **Professional Closing:** (Branding script & Survey offer).

3.2 Sentiment Score (0 – 100%)

VocalMind tracks the customer's emotional trajectory from the start (0:00) to the end of the call.

- **Calculation:** Measures the *delta* (change) in sentiment.
- **Goal:** The score is high if the customer ends the call in a "Neutral," "Hopeful," or "Happy" state, regardless of how "Angry" they were at the start.

3.3 Core Competencies (0 – 5 Scale)

The AI evaluates five specific skill pillars based on natural language understanding (NLU):

1. **Empathy (0-5):**
   - *Criteria:* Verbal acknowledgment of feelings ("I understand why that is frustrating"). Matching the customer's tone.
2. **Clarity (0-5):**
   - *Criteria:* Explaining technical concepts simply. Avoidance of internal jargon. Clear articulation of next steps.
3. **Problem Solving (0-5):**
   - *Criteria:* Asking probing questions. Identifying the root cause. Achieving First Contact Resolution (FCR).
4. **Product Knowledge (0-5):**
   - *Criteria:* Accuracy of plan details, pricing, and technical specs provided. Correct usage of Knowledge Base scripts.
5. **Policy Adherence (0-5):**
   - *Criteria:* Staying within refund limits ($25 vs $75). Following escalation rules. Not sharing forbidden data.

4.0 Behavioral Metrics

These metrics are measured automatically by the telephony integration.

Metric	Target	Definition
Talk Ratio	**40% Agent / 60% Customer**	Agents should listen more than they speak. Avoid monologuing.
Interruptions	**≤ 2 per call**	Instances where the agent speaks over the customer.
Silence %	**< 10%**	Total duration of "dead air" (excluding hold time).
Avg Response Time	**< 3 seconds**	Time taken to respond after the customer stops speaking.
Avg Handle Time (AHT)	**Benchmark**	Varies by call type (e.g., Billing: 6 min, Tech: 12 min).

5.0 Emotion Detection Categories

VocalMind categorizes every "utterance" (sentence) into one of six emotional states based on pitch, volume, and keywords.

1. **Angry:** High volume, rapid pace, aggressive keywords ("cancel," "lawsuit," "incompetent").
2. **Frustrated:** Negative keywords, repetition of issue ("I already told you," "ridiculous").
3. **Anxious:** Hesitant speech, concern about consequences ("worried," "urgent," "please").
4. **Neutral:** Informational exchange, steady pitch.
5. **Hopeful:** Positive acknowledgment of steps ("okay," "that makes sense," "try that").
6. **Happy:** Gratitude, relief ("thank you," "perfect," "great job").

6.0 Automatic Flagging & Risk

Calls meeting specific criteria are immediately flagged for manual Quality Assurance review.

6.1 Flagging Triggers

- **Compliance Failure:** Compliance Score < 70%.
- **Extended Hostility:** Customer emotion detected as "Angry" for > 2 consecutive minutes.
- **Legal Risk:** Missing "Recording Notification" or "Privacy Disclaimer" (Automatic Fail).
- **Process Failure:** Keyword "Supervisor" or "Manager" detected, but no transfer occurred.
- **Sentiment Crash:** Customer sentiment drops > 30% from start to finish.

6.2 Call Outcomes & Risk Levels

- **Outcomes:**
  - *Resolved:* Issue fixed, case closed.
  - *Follow-up Required:* Ticket open, callback pending.
  - *Escalated:* Transferred to Tier 2/3.
- **Risk Levels:**
  - *Low:* Minor coaching needed.
  - *Medium:* Procedural error; written warning potential.
  - *High:* Significant dissatisfaction; retention risk.
  - *Critical:* Legal liability or major abuse; immediate intervention.

7.0 Scoring Examples

Example A: The "Excellent" Call (Score: 4.8)

Scenario: Customer calls about a $10 billing discrepancy.

- **Compliance:** 100% (All scripts read).
- **Empathy:** Agent said, "I can see how that charge is confusing, let's clear that up." (5/5).
- **Problem Solving:** Identified it was a prorated tax, explained it clearly. (5/5).
- **Behavioral:** Talk ratio 35/65. 0 Interruptions.

Sentiment: Started "Frustrated" → Ended "Happy."

- **Result:** A near-perfect interaction.

Example B: The "Needs Improvement" Call (Score: 2.9)

Scenario: Customer calls about slow WiFi speeds.

- **Compliance:** 80% (Forgot to ask "Is there anything else?").
- **Empathy:** Agent ignored customer's complaint about working from home; jumped straight to "Unplug the router." (2/5).
- **Problem Solving:** Followed steps but didn't explain *why*. (3/5).
- **Behavioral:** Interruptions: 4. Dead air: 15 seconds.

Sentiment: Started "Anxious" → Ended "Neutral."

- **Result:** The issue was fixed, but the experience was robotic and rude.

Approved by: Head of Quality Assurance
Date: 7/2/2026