POLICY DOCUMENT: CUSTOMER SERVICE STANDARDS & GUIDELINES

Organization: NA Telecommunications & Internet Services
Department: Call Center Operations
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1.0 Objective

To establish uniform standards for customer interaction within the call center, ensuring security, efficiency, and a superior customer experience. All agents are required to adhere to these guidelines to maintain Quality Assurance (QA) compliance.

2.0 Call Opening Protocol

The first 30 seconds of the interaction set the tone for the entire call.

2.1 Standard Greeting Script
Agents must answer calls immediately upon connection with enthusiasm and clarity.

- **Script:** "Thank you for calling [Company Name] Broadband and Support. My name is [Agent Name]. Who do I have the pleasure of speaking with today?"

2.2 Privacy & Recording Notification

- **Requirement:** Immediately following the greeting, the agent must inform the caller that the line is recorded for quality purposes (unless played by IVR previously).

2.3 Purpose Acknowledgment

- **Requirement:** Once the customer states their reason for calling, the agent must acknowledge it to confirm understanding.
- **Script:** "I understand you are calling regarding [briefly repeat issue]. I can certainly help you with that."

3.0 Identity & Account Verification (ID&V)

To protect customer data and prevent fraud, strict authentication is required **before** discussing account specifics or making changes.

3.1 Verification Steps

Agents must successfully verify the customer using **three** of the following four methods:

1. **Full Account Holder Name:** Must match the CRM exactly.
2. **Account Number:** The unique customer identifier.
3. **Security Question/PIN:** The pre-set security answer.
4. **Last 4 Digits of Payment Method:** Credit card or bank account on file.

3.2 Authorization for Changes

- **Protocol:** No plan upgrades, downgrades, cancellations, or address changes may be processed without completing the Verification Steps above.
- **Third-Party Callers:** If the caller is not the account holder, they must be listed as an "Authorized User" on the account.

4.0 Active Listening & Empathy Standards

Agents must adapt their tone to the customer's emotional state. Validating feelings is as important as fixing the technical issue.

4.1 Emotional State Handling

Customer Emotion	Agent Goal	Required Phrasing / Action
Angry	De-escalate & Validate	"I completely understand why you are angry. That sounds incredibly frustrating, and I am going to make this right."
Frustrated	Empathize & Assure	"I can see how this service interruption has disrupted your day. Let's get this fixed immediately."
Anxious	Calm & Clarify	"Please don't worry. We can resolve this step-by-step together. You are in good hands."
Neutral	Professional & Efficient	"I appreciate you providing those details. Let's proceed with the check."
Hopeful	Encourage & Confirm	"I am glad to hear that! It looks like we are moving in the right direction."

Happy	Match Energy & Thank	"That is fantastic news! I am so happy we could get your connection back up to speed."

4.2 Tone Expectations

- Voice should remain calm, warm, and professional.
- Avoid robotic or monotone delivery. Match the customer's pace (mirroring) without mimicking anger.

5.0 Operational Communication Standards

5.1 Talk Ratio Guidelines

- **Target:** 40% Agent / 60% Customer.
- **Monologue Policy:** Agents must avoid long, technical monologues. Break explanations into digestible chunks.
- **Pacing:** Pause for 1–2 seconds after explaining a technical step to allow the customer to process or ask a question.

5.2 Response Time Standards

- **Average Response Time:** Agents must respond to a customer's statement or question within **3 seconds**.
- **Dead Air Policy:** There should be no "dead air" (unexplained silence) lasting longer than **5 seconds**.
- **Filler Acknowledgments:** If searching for data, use verbal fillers to maintain connection:
    - "I see that here..."
    - "I understand, let me pull up those details..."
    - "One moment while I access the router logs..."

5.3 Interruption Policy

- **Standard:** Agents must allow the customer to finish their thought before speaking.
- **Maximum Allowance:** A maximum of **2 interruptions** per call is acceptable only if necessary to steer a wandering conversation back to resolution. Ideally, interruptions should be zero.

5.4 Silence Management

- **Extended Silence:** If a task requires silence (e.g., running a line test), the agent must not remain silent for more than **10 seconds** without re-engaging.

- **Re-engagement Script:** "I am still here with you; the diagnostic test is at 50% complete. Thank you for your patience."

6.0 Resolution & Closing Protocol

6.1 Root Cause Explanation

- **Requirement:** The agent must explain *why* the issue occurred (e.g., "The modem was outdated," "There was a local outage") to build trust.

6.2 Resolution Summary

Before closing, the agent must recap the interaction.

- **Format:** The Issue + The Fix + Follow-Up Actions.
- **Script:** "Just to recap, you called about slow WiFi speeds. We reset the channel on your router to alleviate congestion. You should now see full speeds. I have also noted this on your account."

6.3 Offering Additional Assistance

- **Mandatory Question:** "Is there anything else I can help you with today?"
- **Escalation:** If the issue is not resolved, the agent must offer supervisor escalation or a Tier 2 callback window.

6.4 Call Closing Script

- **Reference Number:** Provide the unique Case/Ticket ID.
- **Closing:** "Thank you for choosing [Company Name]. Your Case Reference Number is [12345]. Please stay on the line for a brief 1-minute survey about my service today. Goodbye."

7.0 Documentation Requirements

Accurate record-keeping is vital for technical support continuity.

7.1 Post-Call Work (ACW)

- **Timeline:** Case notes must be completed and saved within **5 minutes** of the call ending.
- **Content:** Notes must include:
    - Verified Identity Method.
    - Issue Reported.

- Troubleshooting Steps Taken.
- Resolution Status.
- Customer Sentiment.

APPENDIX A: QA Compliance Checklist

Quality Assurance analysts will utilize the following checklist to grade call performance.

Compliance Item	Requirement Description	Pass/Fail
1. Greeting & Intro	Proper greeting used; Agent name clearly stated.	[ ]
2. Privacy Disclaimer	Call recording/privacy disclaimer stated (if not automated).	[ ]
3. Identity Verification	3 of 4 identifiers verified successfully.	[ ]
4. Account Security	Account verified *before* any changes/disclosures made.	[ ]
5. Cause Explanation	Explained the root cause of the issue to the customer.	[ ]
6. Resolution Summary	Summarized the issue, the fix, and next steps before closing.	[ ]
7. Additional Help	Asked "Is there anything else I can help you with?"	[ ]
8. Escalation Offer	Offered Supervisor/Tier 2 support if immediate fix failed.	[ ]
9. Documentation	Case notes completed accurately within 5 minutes.	[ ]
10. Closing & Survey	Case Reference provided; Survey offered; Professional closing.	[ ]

Approved by: Quality Assurance Department
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