

Half-Full Bottling, Inc. - Support Team QA Checklist - Guidance



Did Agent State Their Name?

- **Corresponding Value:** Customer-Centric Approach
- **Yes/No?:**
- **Explanation:** The agent's self-introduction sets the stage for a personal and engaging interaction.
- **Gauging Compliance:**
 1. Review call recordings to check if the agent introduced themselves.
 2. Look for customer acknowledgments of the agent's name in the conversation.
 3. Check for consistency in agent introduction across multiple calls.
 4. Monitor customer feedback mentioning agent personalization.
 5. Include a question in post-call surveys about the clarity of agent introduction.
 6. Audit chat transcripts for agent's name introduction.
 7. Evaluate the warmth and friendliness of the introduction during the call.
 8. Assess if the agent reintroduces themselves after a hold or transfer.
 9. Listen for a professional and clear enunciation of the name.
 10. Confirm if the agent also provides their direct extension or contact information if applicable.

Did Agent State Their Dept?

- **Corresponding Value:** Customer-Centric Approach
- **Yes/No?:**
- **Explanation:** Stating the department helps the customer understand the agent's expertise.
- **Gauging Compliance:**
 1. Check recordings for specific department mentions at the beginning of calls.
 2. Evaluate customer responses for signs of understanding the agent's role.
 3. Look for department references when transferring calls.
 4. Verify if email correspondence includes the agent's department signature.
 5. Analyze the context in which the department is mentioned for appropriateness.
 6. Monitor if the department is stated clearly and confidently.
 7. Review if agents are stating the correct department for their specialization.

8. Ensure department mention is part of the standard script in calls and emails.
9. Survey customers to see if they felt they spoke to the right department.
10. Examine if the department is stated upon customer request or confusion.

Ask or Verify Business Phone Number and Business?

- **Corresponding Value:** Innovation and Proactivity
- **Yes/No?:**
- **Explanation:** Accurate business details are critical for follow-up and customer validation.
- **Gauging Compliance:**
 1. Assess if the agent asked for or confirmed the phone number early in the call.
 2. Monitor if verification is done politely without making the customer feel interrogated.
 3. Look for callbacks made to the verified number to confirm issue resolution.
 4. Check if customer records are updated with the verified number.
 5. Review calls to ensure the agent repeats the number for confirmation.
 6. Examine if verification steps are done each time, even with repeat customers.
 7. Verify that agents are trained to handle situations where the customer cannot confirm their details.
 8. Analyze the process followed when discrepancies in business details are found.
 9. Ensure that verification is done in compliance with privacy standards.
 10. Look for confirmation in writing for email or chat support where the customer provides their number.

Check to See if There is Existing Ticket?

- **Corresponding Value:** Innovation and Proactivity
- **Yes/No?:**
- **Explanation:** Checking for an existing ticket helps in providing continuous support.
- **Gauging Compliance:**
 1. Verify through ticketing systems if the agent checked for an existing ticket.
 2. Confirm that agents ask customers about previous interactions or ticket numbers.

3. Ensure that agents use the customer's phone number or email to search for tickets.
4. Review if agents document the check in their call or support notes.
5. Examine if agents link new issues with pre-existing tickets where relevant.
6. Check for agent follow-up on open tickets mentioned during the call.
7. Assess the ease with which agents navigate the ticketing system.
8. Audit if agents mention existing tickets when escalating issues.
9. Monitor the protocol for merging or updating tickets to avoid duplication.
10. Ensure that agents are verifying ticket details against customer provided information for accuracy.

Confirm Callback Number if Call Drops?

- **Corresponding Value:** Customer-Centric Approach
- **Yes/No?:**
- **Explanation:** A confirmed callback number ensures the conversation can continue without interruption.
- **Gauging Compliance:**
 1. Check for the agent's confirmation of a callback number at the start of each call.
 2. Evaluate if the agent reconfirms the number any time they suspect a call may drop.
 3. Listen for a professional and respectful request for the callback

number.

4. Review cases where calls were dropped to see if customers were promptly called back.
5. Monitor if agents document the confirmed callback number in the system.
6. Ensure that agents are trained to handle situations when a customer is hesitant to provide their number.
7. Verify if callback procedures are followed in case of a dropped call.
8. Review if customers are informed about the callback procedure during the initial call.
9. Check if agents are verifying the callback number against the existing records for discrepancies.
10. Ensure callbacks are made on priority when a call drop occurs, showing customer respect and efficiency.

Confirm Email Address is Correct?

- **Corresponding Value:** Customer-Centric Approach
- **Yes/No?:**
- **Explanation:** A valid email address is crucial for sending service updates or follow-up information.
- **Gauging Compliance:**
 1. Observe if the agent requests the customer to spell out their email address for accuracy.
 2. Verify if the agent sends a confirmation or test email while on the call.
 3. Check for the agent's confirmation of receipt when sending information to the customer's email.
 4. Ensure that email addresses are verified against customer records for accuracy.
 5. Review if agents ask for alternate contact methods if the email is incorrect or bounces back.
 6. Look for documentation of the verified email address in customer interaction notes.
 7. Assess the agent's protocol in updating email information in the CRM system.
 8. Monitor for any customer corrections or updates to their email during the interaction.
 9. Check if agents clarify common mistakes in email addresses, like .com versus .net.
 10. Ensure that any change to the email address is confirmed with the customer for authorization.

Record the Caller's Name?

- **Corresponding Value:** Excellence and Quality Focus
- **Yes/No?:**
- **Explanation:** Using the caller's name during the interaction fosters a connection and personalized service.
- **Gauging Compliance:**
 1. Listen for the agent's use of the customer's name at least twice during the call.
 2. Review if the customer's name is correctly noted in the system for future reference.
 3. Check if the agent asks for the correct pronunciation of the customer's name.
 4. Ensure that agents use the customer's name to personalize the conversation.
 5. Review chat transcripts to see if the agent addressed the customer by name.

6. Verify that the use of the customer's name is natural and not overused.
7. Monitor if the customer's name is used respectfully throughout the interaction.
8. Check if agents confirm the spelling of the customer's name when it is uncommon.
9. Evaluate if the agent acknowledges and corrects themselves if they mispronounce the name.
10. Look for customer feedback that indicates they felt recognized and respected through the use of their name.

Checked to See if Caller Authorized to Make Change?

- **Corresponding Value:** Integrity and Transparency
- **Yes/No?:**
- **Explanation:** Ensuring authorization before making account changes is key for security and compliance.
- **Gauging Compliance:**
 1. Confirm that agents are asking for identification or security questions before proceeding with changes.
 2. Review calls for the agent's adherence to security protocols when authorization is in question.
 3. Look for agents' use of dedicated tools or systems to verify authorization status.
 4. Ensure agents note the authorization check and result in the customer's record.
 5. Audit interactions for consistency in performing authorization checks.
 6. Monitor agent training records to ensure they are updated on the latest security procedures.
 7. Verify that any discrepancies in authorization are handled delicately and according to protocol.
 8. Check for the agent's immediate escalation of issues when authorization cannot be confirmed.
 9. Evaluate how agents handle situations where the caller is not authorized to make changes.
 10. Review if agents explain to customers why authorization checks are necessary for transparency and trust-building.

Did Agent Actively Listen?

- **Corresponding Value:** Excellence and Quality Focus
- **Yes/No?:**
- **Explanation:** Active listening is essential for understanding and accurately addressing the customer's needs.
- **Gauging Compliance:**
 1. Evaluate if the agent paraphrased customer concerns to demonstrate understanding.
 2. Review calls for moments when the agent allowed the customer to speak without interruption.
 3. Monitor if the agent asked follow-up questions based on the customer's statements.
 4. Check if the agent offered solutions or summaries that align with the customer's initial problem.
 5. Listen for empathetic responses or acknowledgment of the customer's feelings.

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- . Assess if the agent avoided jumping to conclusions or making assumptions.
- 7. Verify that the agent's responses are relevant and on-topic, showing they're engaged.
- 8. Look for pauses in the conversation that give the customer time to think or add more information.
- 9. Review the agent's tone for signs of patience and attentiveness.
- 10. Evaluate customer feedback for mentions of feeling heard and understood.

Was the Agent Courteous?

- **Corresponding Value:** Excellence and Quality Focus
- **Yes/No?:**
- **Explanation:** Courtesy is the cornerstone of positive customer interaction and reflects professionalism.
- **Gauging Compliance:**
 1. Listen for polite language and a respectful tone throughout the interaction.
 2. Review if the agent used proper greetings and closings in the call.
 3. Check if the agent expressed gratitude for the customer's business or patience.
 4. Monitor if the agent remained polite even when dealing with difficult situations.
 5. Evaluate if the agent showed respect for the customer's time by addressing issues efficiently.

6. Observe if the agent's body language (in video calls) reflected a courteous demeanor.
7. Review if the agent avoided interrupting the customer and waited their turn to speak.
8. Check for the consistent use of 'please' and 'thank you' in interactions.
9. Assess if the agent handled customer frustration with grace and professionalism.
10. Ensure that customer complaints about discourtesy are addressed immediately and effectively.

Was the Agent Empathetic?

- **Corresponding Value:** Excellence and Quality Focus
- **Yes/No?:**
- **Explanation:** Empathy builds rapport and trust, showing customers that Half-Full Bottling, Inc. cares about their experience.
- **Gauging Compliance:**
 1. Look for verbal cues that the agent is understanding the emotional context of the customer's issue.
 2. Review if the agent acknowledged the customer's feelings and frustrations.
 3. Monitor for active responses that align with the customer's emotional state.
 4. Check if the agent offered genuine apologies or consolation when appropriate.
 5. Evaluate if the agent's solutions were presented with consideration for the customer's situation.
 6. Observe if the agent provided extra assistance to customers expressing distress or confusion.
 7. Verify if empathy was conveyed consistently, not just as a reaction to escalated situations.
 8. Assess if the agent used empathetic language to connect with the customer on a personal level.
 9. Look for follow-up actions that show the agent took the customer's situation seriously.
 10. Review customer feedback for specific mentions of feeling supported and understood by the agent.

Did the Agent Avoid Blaming Others?

- **Corresponding Value:** Excellence and Quality Focus
- **Yes/No?:**
- **Explanation:** Responsibility and accountability in resolving issues positively impact customer trust.
- **Gauging Compliance:**
 1. Evaluate if the agent focused on solutions rather than assigning blame for the issue.
 2. Monitor conversations for language that maintains the company's responsibility.
 3. Review if the agent took ownership of resolving the issue within their capacity.
 4. Check if the agent refrained from negative comments about other teams or individuals.
 5. Assess if the agent communicated any necessary explanations without defensiveness.
 6. Verify that the agent addressed the root cause of the problem, not just the symptoms or errors made by others.
 7. Look for the agent's initiative in coordinating with other departments for issue resolution.
 8. Ensure that any inter-departmental issues are handled internally and not exposed to the customer.
 9. Observe if the agent acted as the face of Half-Full Bottling, Inc., regardless of where the issue originated.
 10. Review if the agent reassured the customer that the issue would be resolved regardless of its origin.

Asks Probing/Pertinent Questions?

- **Corresponding Value:** Innovation and Proactivity
- **Yes/No?:**
- **Explanation:** Asking the right questions is crucial to identify the customer's issue and resolve it effectively.
- **Gauging Compliance:**
 1. Evaluate if the questions asked led to a better understanding of the problem.
 2. Review if the agent avoided generic questions and tailored their approach to the individual case.
 3. Monitor the flow of the conversation to see if questions were asked at appropriate times.

4. Check if the agent asked open-ended questions that prompted detailed responses.
5. Assess if the agent's questions were direct and relevant to the customer's concerns.
6. Verify that questions helped clarify the situation rather than causing further confusion.
7. Observe if the agent used the answers to guide their troubleshooting process effectively.
8. Ensure

that the agent asked for all necessary information upfront to avoid back-and-forth.

9. Review if the agent was able to ask follow-up questions based on the customer's responses.
10. Evaluate customer feedback for any comments on the helpfulness and relevance of the agent's questions.

Uses Appropriate Wikis?

- **Corresponding Value:** Humbly Confident/Continuous Improvement
- **Yes/No?:**
- **Explanation:** Accessing and applying information from Wikis effectively showcases agent knowledge and resourcefulness.
- **Gauging Compliance:**
 1. Monitor if the agent referred to Wikis or knowledge bases during the call to provide accurate information.
 2. Review if the agent used technical terms from Wikis correctly and with understanding.
 3. Check if the agent was able to quickly find relevant information in the Wiki.
 4. Assess if the agent applied the information from Wikis to resolve the customer's issue.
 5. Verify that Wiki resources are up-to-date and that agents are trained on their usage.
 6. Observe if the agent's use of Wikis reduced the need for call transfers or escalations.
 7. Ensure that agents are contributing to the Wikis when they encounter new issues or solutions.

8. Review the appropriateness of the Wiki content used in the context of the customer's problem.
 9. Check if the agent explained complex Wiki information in a way that the customer understood.
 10. Evaluate if the agent provided additional Wiki resources or articles to the customer for self-help.
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