

parrot - checklist for call center agents in between calls:

Pre-Call

- **Review Customer Information** : Quickly glance over the customer's information on the CRM system to familiarize with their account history, past interactions, and any relevant details about customer's inquiry.
- **Check for Notes**: If there are any notes left by previous agents who may have interacted with the customer. This can provide valuable context and avoid asking repetitive questions.
- **Prepare for the Call**: Based on the customer information and the reason for the call, anticipate the customer's needs and have any necessary resources readily available (e.g., product manuals, troubleshooting guides, knowledge base articles).

Post-Call

- **Document the Call**: Summarize the key points of the conversation, including the customer's inquiry, the resolution provided (if any), and any follow-up actions required.
- **Update Customer Information**: If there are any changes to the customer's account information, update the CRM system accordingly.
- **Submit Call Disposition**: categorize the call based on its outcome (e.g., resolved, transferred, pending).

Customer Service

- **Personalize the Greeting**: Address the customer by name and use a friendly and professional tone of voice.
- **Actively Listen**: Pay close attention to what the customer is saying and avoid interrupting.
- **Empathize with the Customer**: Acknowledge the customer's frustration or concerns and show that their situation is being understood.
- **Use Positive Language**: Focus on finding solutions and use reassuring language to build trust with the customer.

Call Efficiency

- **Mute When Not Speaking**: This avoids background noise being transmitted to the customer.
- **Avoid Placing the Customer on Hold**: Explaining why and ask for customer permission first, before putting on hold.
- **Use Call Transfer Effectively**: Ensure they are transferred to the appropriate department or agent who can handle their inquiry.

Professionalism

- **Maintain a Professional Demeanor:** Even if the customer is rude or irate, remaining calm, collected, and courteous.
- **Adhere to Company Policies:** Following all company policies and procedures regarding customer interactions.
- **Take Breaks:** Taking short breaks throughout the shift to avoid burnout and maintain a positive attitude.
- **Stay Up-to-Date on Products and Services:** Familiarize with the latest company products, services, and promotions to provide accurate and helpful information to customers.