

Outbound Sales Scorecard			0 - 5
#	Question	Comment	Score
	Customer Service		
1	Greeted the caller and thanked them for calling		
2	Established rapport		
3	Followed procedural compliance		
4	Transferred the caller to the incorrect department/person (Deduct 10 points)		
5	Followed legal regulations		
	Selling		
6	Educated the caller about additional features and benefits		
7	Appropriately followed the company script		
9	The agent picked up on any buying signals and used an assumptive close		
	Customer Handling		
10	Properly responded to the customer and remained attentive		
11	Correctly applied transitional phrases		
12	Avoided interrupting or speaking over the customer		
	Call Etiquette		
13	Maintained a professional tone and pace when speaking		
14	The message delivered was clear and concise		
	Wrap-Up		
15	Reviewed all actions that were taken with the customer		
16	Assisted the customer with any additional questions they had		

AVOXI®

Total:

/ 75

Inbound Sales Scorecard			0 - 5
#	Question	Comment	Score
	Greeting		
1	Used the proper introduction		
2	Confirmed that the caller is a qualified lead		
3	Confirmed the contact information for the caller is correct		
	Selling		
4	Discussed add-on features and benefits		
5	Built rapport with the caller		
6	Accurately used probing questions		
7	Created a need for new products with the caller		
8	Used a presumptive close		
	Accuracy and Compliance		
9	Accurately answered all the caller's questions		
10	Discussed the correct pricing information		
11	100% legal compliance		
12	Discussed any disclosures		
13	Verified that the customer's order is correct		
	Call Etiquette		
14	Highlighted important key words		
15	Used an appropriate tone and pace when speaking		
16	Upheld a professional, confident attitude		
17	Used proper grammar and refrained from using jargon		
	Wrap-Up		
18	Offered to further assist the customer with any additional questions		
19	Thanked the customer for calling		

Technical Support Scorecard			0 - 5
#	Question	Comment	Score
	Greetings		
1	Properly greeted the caller and introduced themselves		
2	Accurately identified the caller and verified their account		
3	Incorrectly transferred the caller (Deduct 10 points)		
	Problem Solving		
4	Took responsibility for the problem at hand		
5	The agent assured the customer that they were there to help		
6	Sought out clues and asked relevant questions		
7	Created an accurate action plan		
8	Limited the amount of time the caller was on hold		
9	Displayed proper diagnostic skills		
	Resolution		
10	Resolved the issue swiftly and immediately if possible		
11	Set a realistic time frame for a resolution		
12	Explained the solution to the caller		
	Call Etiquette		
13	Remained attentive to customer comments/concerns		
14	The agent never interrupted the customer		
15	No long/ silent pauses occurred		
16	The agent spoke highly of all the company's departments		
17	The agent spoke out of line/was rude to the customer (Deduct 15 points)		
	Wrap-Up		
18	Offered to assist the customer with anything else they needed		
19	Thanked the customer for calling		

Customer Service Scorecard			0 - 5
#	Question	Comment	Score
	Greetings		
1	Introduced themselves and the company		
2	Retrieved the customer's account number and accurately identified the caller in the system		
3	Incorrectly transferred the caller (Deduct 10 points)		
	Problem Solving		
4	Asked relevant questions when retrieving information		
5	Displayed empathy and took fault for the problem		
6	Gave the customer an appropriate time frame for the problem to be resolved		
7	Followed the company's hold procedures		
	Call Etiquette		
8	Interrupted the caller (Deduct 10 points)		
9	Spoke confidently with patience and used proper mannerisms		
10	Refrained from using any type of slang or jargon		
11	Spoke clearly and with the proper tone		
12	Went the extra mile for the customer (Add 5 points)		
	Wrap-Up		
13	Reviewed all the actions taken with the customer		
14	Asked the customer if they had any other questions and thanked them for calling		

Chat Scorecard			0 - 5
#	Question	Comment	Score
	Greetings		
1	Punctually answered the customer with a proper greeting		
2	The agent asked follow-up questions to ensure they understood the problem		
3	Informed the customer of the steps being taken to solve the problem		
4	Thanked the customer for chatting		
	Resolution		
5	The correct information was used		
6	The question asked was accurately and efficiently answered to the agents best ability		
7	Built rapport		
8	Used proper chat etiquette		
9	Proper spelling, grammar and punctuation was used		
10	Used compassionate responses		
	Process		
11	Took time to explain the process to the customer		
12	Relevant records were pulled up to assist the customer		
13	Correctly followed the guidelines for answering questions		
14	Mentioned new products/services		
	Wrap-Up		
15	Offered assistance with anything else the customer needed		
16	Thanked the customer for chatting		
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Phone Scorecard			0 - 5
#	Question	Comment	Score
	Communication Skills		
1	There were no silent pauses		
2	The agent de-escalated the issue		
3	The agent spoke clearly		
4	The agent displayed confidence		
5	Used empathetic phrases/words		
	Process		
6	The agent followed procedures		
7	Retrieved the accurate information needed to solve the conflict		
8	The call was incorrectly transferred to a different agent (Deduct 10 points)		
	Product Competencies		
9	The agent effectively got to the root of the problem		
10	Administered all relevant information to the customer		
11	Resolved the customer's issue		
	Call Etiquette		
12	Positive, energetic and enthusiastic tone was used		
13	Proper mannerisms was used along with a polite and patient attitude		
	Wrap-Up		
14	The agent reviewed all the actions taken with the customer		
15	The agent offered to assist the customer with anything else they needed		
16	Thanked the customer for chatting		