

# CALL CRITERIA

## Greeting

### 1. Answer Phrase

How complete your answer phrase was.

- a. Complete with Genuine Interest and Positive Attitude (5 Points)  
Includes all of the words in the answer strip as well as the agent's name, and the agent's tone was pleasant and sounded interested and helpful. **Points are often lost here when an agent says "how may I help you?" at the end of an answer phrase, but it sounds scripted instead of being a genuine question.**
- b. Complete (4 Points)  
Includes all of the words in the answer strip as well as the agent's name, but sounded rushed, disinterested, tired, robotic, etc.
- c. Partially Complete (3 Points)  
Includes the client's name and the agent's name, but omits other words that were printed in the answer phrase (like "Good Morning" or "Thank you for calling")
- d. Not Complete (0 Points)  
Either did not include the client's name, or did not include the agent's name.

### 2. Voice During The Greeting

The agent's tone and pronunciation during the answer phrase

- a. Clear, and the Entire Answer Phrase Could Be Understood (5 Points)  
Entire answer phrase was enunciated clearly and at a listenable rate.
- b. Mostly Clear, and the Company Name Could Be Understood (3 Point)  
The client's name was acceptable, but some other part of the answer phrase was stumbled over, enunciated poorly, too fast, or too slow. **It's usually the phrases we say the most often that turn into an unintelligible mess – don't let 'may I help you' come out 'maelpyoo'.**
- c. Poor or Unacceptable (0 Points)  
The client's name was difficult to understand. The client's name is the most important part of the answer phrase, so **even if the rest of the phrase was fine, you can still get a 0 if the client's name wasn't enunciated clearly.**

## Message

### 1. Offer to Assist The Caller

The agent's offer to take a message

- a. Good, agent advised the caller they were taking a message promptly, and before requesting any information (**10 Points**)  
**We always need to offer to take a message before we ask for any information.** An offer can be as simple as "I can take a message for the office" or as detailed as "I can contact the plumber on call if this is an emergency, or I'll be glad to leave your information for the office when they open" but in both cases we're making clear that we'll take their information, and give it to the client.

# CALL CRITERIA

- b. Poor, agent did not promptly offer to take a message, or requested information before informing the caller why (0 Point)

Usually this means the agent asked a question like "Can I ask who's calling, please?" without first telling the caller they're taking a message, or told them "They're not in yet" or "They've already left" without *immediately* offering to take a message. **If you need to tell a caller that the office is unavailable, in that same breath you also have to tell them that you can take a message** – "The office won't be open until 8:30, but I'd be happy to ask them to call you".

## 2. Confirmed the spelling of the caller's surname

The agent read aloud the full and complete spelling of the caller's last name.

- a. True (5 Points)

It's important to note that if the caller corrects you, you have to read again the full spelling of the name – **partial or incorrect spellings don't count**, and this is a true/false criteria, meaning there's no partial points awarded.

- b. False (0 Points)

## 3. Confirmed the caller's telephone number

The agent read aloud the caller's full and complete phone number, all 7 digits for local numbers of 10 digits for long distance

- a. True (5 Points)

Like the last name, if the caller corrects you, you have to repeat the full correct number, and this is also a true/false criteria. **Getting an accurate name and number is one of the most important parts of our job**, which is why these two criteria are some of our most strict.

- b. False (0 Points)

## Customer Service

### 1. Call Control

How well the agent led the caller

- a. Good, agent guided the caller throughout the call with appropriate questions (5 Points)

Agent didn't leave dead air, and asked the caller for most of the needed information rather than having them just offer it.

- b. Acceptable, agent maintained control through most of the call with minimal dead air (3 Points)

"Minimal" is at the reviewer's discretion based on the overall pace of the call.

- c. Poor or unacceptable, caller leads the call and rambles on, or dead air is heard (0 Points)

Dead air is bad for call control because a caller will naturally seek to fill the empty space – after they give you information, if you don't respond quickly and ask another question, callers will often start offering unnecessary information, or give

# CALL CRITERIA

you information you're not ready for that you'll have to ask them for again. At that point you've lost control of the call.

## 2. Attitude

How pleasant and helpful the agent seemed

- a. Good, choice of words and tone of voice were pleasant and helpful (5 Points)
- b. Acceptable, agent sounded interested and helpful through most of the call (3 Points)
- c. Poor or unacceptable, agent did not convey a pleasant helpful attitude (0 Points)

The agent gave a pleasant impression, from start to finish.

Notice that the 0 point option doesn't say anything about being "rude". Being rude would be a 0, of course, but being "neutral" can also be a 0. **If you sound bored, tired, or in a hurry, that can be a 0** as well. Remember, you're a paid actor – even when those things are true, you can't let it come through in your tone of voice.

## 3. Grammar

The professionalism of the agent's choice of words

- a. Good, proper business language was used throughout the call (5 Points)
- b. Acceptable, but agent used "Okay" when a "Thank You" would have been more appropriate (3 Points)
- c. Poor or unacceptable, agent misused grammar or used a slang term (0 Point)

Agent didn't use any slang terms, and didn't overuse or misuse any words or phrases.

For instance, when we ask for information and the caller gives it to us, we should always respond with "thank you", not "okay".

Note that 'slang term' and 'misuse' are up to the discretion of the reviewer. There are no hard and fast rules about what constitutes slang words or usage. Some things (like "okie-dokie") are obviously slang, other things ("Will do", "You got it") are up to the reviewer. For that reason, **you should always strive to use your most professional language**, and leave no room for doubt.

## 4. Confidence and Knowledge

How confident the agent sounded

- a. Good, agent appeared knowledgeable and gave appropriate responses (5 Points)
- b. Acceptable, agent appeared to have some knowledge, but was inconsistent (3 Points)

Agent continually responded to the caller in a way that made them sound knowledgeable.

# CALL CRITERIA

Agent usually responded in a way that made them sound knowledgeable, but not always.

- c. Poor or unacceptable, agent did not sound confident (0 Points)

Note that this says *appears* knowledgeable and *sounds* confident – as an answering service, there’s lots of things we don’t know. There’s simply no way for us to be familiar with all the industry jargon for the companies we work for, or for us to have the answer to every caller’s questions, and we don’t expect you to. However, **there are ways to communicate to a caller that we don’t know something without sounding uninformed or unsure of ourselves** – if a caller asks “When is my appointment?”, instead of saying “I don’t know, I’m just the answering service”, say “I don’t have access to their appointment schedule, but I’d be happy to ask someone that does to give you a call back”.

## 5. Voice Quality

How well the agent enunciated and adhered to a listenable rate of speech

- a. Good, agent enunciated clearly, didn’t mumble, and spoke at an appropriate pace (5 Points)

A listenable rate of speech according to professional speakers is between 140 and 160 words per minute – it’s been described as about the speed you’d use when reading a Dr. Seuss book to a small group of children. As for enunciation, we try to provide some leeway for people’s natural accents, but ideally, your voice should be clear and devoid of any accent. Think of news reporters on national cable news networks for example (CNN, etc) – if a regional accent is present, it’s generally only slight. We try to hire people with better-than-average voices to begin with, but there’s always room for improvement. There’s lots of exercises available for free online designed to improve your enunciation, and Chuck Bauer has several videos dedicated to listenable rate of speech.

- b. Acceptable, agent did not consistently enunciate clearly, or spoke too quickly or slowly (3 Points)

Agent’s voice was clear most of the time, or was less than ideal but the caller didn’t seem to have trouble understanding them.

- c. Poor or unacceptable, agent was difficult to understand (0 Points)

Agent’s voice was difficult to understand, or caller needed to ask the agent to repeat themselves for reasons within their control.

## Closing

### 1. Closing

How well the agent closed the call

- a. Good, agent sounded confident and advised caller who would receive their message, and when (**10 Points**)

A good closing will let the caller know what you’re doing with their information, and give them some idea of when to expect a call back – it will always have a *who* and a *when*. We can’t promise on behalf of the client, of course, but **we should**

# CALL CRITERIA

**always tell the caller what we're going to do.** "I'll send this information to the plumber on call immediately" or "I'll ask the office to call you back as soon as they return" are both good phrases, because they let the caller know where their message is going, and when.

- b. Agent sounded confident, but gave a vague closing that did not include a who and a when (e.g. "I'll let them know") (5 Points)

A phrase like "I'll make sure they get this" would only get half points, because you've given the caller only a vague idea of what you're doing, and no idea when they can expect the person they're trying to reach to get their message.

- c. Poor or unacceptable, did not advise caller what would be done with their message, or did not sound confident (0 Points)

Note that you can get a 0 here for not sounding confident - **even if you say the right thing, if you don't sound sure of yourself, you're not giving the caller the impression that you're a capable person and their issue is being handled.**

## Customer Experience

### 1. Interaction with the caller

How engaged the agent seemed with the caller

- a. Good, agent was consistently engaged throughout the call (5 Points)

Agent consistently sounded like the caller had their full attention, and their tone and demeanor were suitable to the call – enthusiastic with a happy caller or empathetic with an upset one, for instance.

- b. Acceptable, agent sounded engaged through most of the call (3 Points)

Agent sounded like the caller had their attention for most of the call, but seemed to get distracted briefly, or didn't maintain an appropriate tone.

- c. Poor or unacceptable, agent sounded disinterested, mechanical, or scripted (0 Points)

One of the things that's not immediately obvious is that "**sounding disinterested**" isn't always just a bored tone of voice. It can be, but it can also be if it sounds like you're involved in a side conversation with a coworker, busy typing or reading something (even if it's the mastercard), or if you have to ask a caller again for information they gave you earlier in the call. It's tough, because our jobs do require us to multitask, and very rarely is our conversation with our caller the only thing on our minds, but we have to *sound* like it's the only thing we're doing.

- d. Unacceptable, agent did not convey a tone appropriate to the call (0 Points)

We don't interact with hospice and funeral home clients the same way we would with someone calling in an order for milk. The most important part of engagement with your caller is conveying a tone appropriate to what they're calling for, and because of that, you can fail this one for not doing that.

# CALL CRITERIA

## Courtesy

### 1. Please

- a. At least two pleases (3 Points)

Note that if the answer phrase contains a please, it is not counted in your total.

- b. Only one please (2 Points)
- c. No pleases (0 Points)

### 2. Thank You

- a. At least one thank you (2 Points)

Like pleases, a thank you in the answer phrase is not counted in your total. Additionally, using "thank you" as a goodbye is currently counted, but that may change in the future, so if you're used to that being your only thank you, you may want to start incorporating them other places in the call.

- b. No thank yous (0 Points)

### 3. Caller's Name

- a. At least two uses of the caller's name (5 Points)
- b. Only one use (3 Points)
- c. No uses (0 Points)

## Agent-Initiated Hold

### 1. Agent's request to hold

How the agent put the caller on hold

- a. Good, agent politely asked the caller to hold and waited for their response (5 Points)

Part of asking politely is letting the caller know why they're being placed on hold. If you're connecting them to the on call, don't just say "Can you hold for a moment?", say "Can you hold while I contact the on call?".

- b. Mediocre, agent asked the caller to hold, but did not wait for a response (3 Points)
- c. Unacceptable, agent did not ask before placing the caller on hold (0 Points)

If you tell the caller to hold instead of asking them to hold, you'll score a 0. Don't ever say "Hold one moment, please", always *ask*.

### 2. Agent's return from hold

- a. Good, agent acknowledged the hold and thanked the caller for waiting (5 Points)

**Whenever you retrieve a caller from park, always thank them for waiting.** Never just say something like "go ahead" – always thank the caller for waiting.

- b. Poor, did not thank the caller or recognize the hold (0 Points)

# CALL CRITERIA

## A few notes on how calls are scored:

Your final score is the percentage of points earned compared to the total points available for that call. If the total points available for a call was 50, and you earned 40, that's an 80%. The total points available for each call depends on which criteria are applicable – for instance, if you never put a caller on hold, then the 10 points from Agent-Initiated Holds aren't applicable, so they're not calculated in your final score.

When scoring, we generally select calls that are 55 seconds or longer have a complete message. **However, any inbound call you take can be graded.** There is no requirement that the call must be a certain length, or that you had to have taken a message. **You could even be graded on even just the answer strip of a dead air call.** We haven't done that and don't currently plan to, however, don't think just because a call is short or the caller didn't leave a message that it's exempt.

Additionally, since scores are a percentage of points earned to total points available, the fewer criteria that apply to your call, the more 'valuable' the points from each one are. Losing 5 points out of a total 75 is only an 8% difference, but losing 5 points out of 15 is 33% – that means **not offering to take a message on a "will call back" could mean a failing call for the month.**

For those reasons, it's very important that you adhere to the criteria on every call. The only calls we won't grade monthly are nurses calling from hospitals, but that doesn't mean we never review them, and on those, we still expect professional language, clear enunciation, engagement, pleases and thank yous, and confirmation of the spelling of the patient's surname.