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1-CALL INTRODUCTION

1.1 Greeting

POINTS: 1

Scoring:

Yes/No

What:

Did the officer greet the customer using an engaging tone?

Why:

- First impressions count
- An energetic engaging greeting shows that the officer is eager to help
- Promotes a consistent and professional approach to answering calls
- Initiates the rapport building process with the customer

How:

- A clear, professional, customer oriented greeting delivered with positive tone, modulation and enthusiasm

Example:

- "Good morning/afternoon..."
- "Hello, this is..."

1.2 Name

POINTS: 1

Scoring:

Yes/No

What:

Did the officer provide their name at the beginning of the interaction?

Why:

- Allows the customer to feel comfortable that they can address the agent on a first name basis thereby building trust and personalizing the interaction
- Gives the customer confidence that the officer is willing to be held accountable for their service

How:

- The officer provides their first name when greeting the customer

Example:

- "... this is James"
- "You're speaking with Mia"

1.3 Offer of Assistance

POINTS: 1

Scoring:

Yes/No

What:

Did the officer ask how they could help the customer?

Why:

- Promotes the officers willingness to assist the customer
- Is the first question designed to probe the customer's needs

How:

- Officer asks a clear open question during the greeting that invites the customer to advise the reason for their call

Example:

- "...how can/may I help you?"
-

1.3**Clear Statement of Ownership****POINTS: 2****Scoring:**

Yes/No

What:

Did the officer make a clear ownership statement?

Why:

- Customer's want reassurance that their issue is important and that someone will take ownership in helping them resolve it
- Puts the customer at ease that they have come to the right person and re-enforces the intention for first contact resolution

How:

- Officer clearly confirms that they can help the customer with an affirmation statement after the customer has had the opportunity to outline their query
- Must be provided with confidence. If officer is hesitant, unwilling, unenthusiastic then this is not a *clear* offer of ownership

Example:

- "No problem, I can help you with that"
- "Sure, I can sort that out for you"
- "Let me look into that for you"

1.2**Asked for Customer's Name****POINTS: 2****Scoring:**

Yes/No

What:

Did the officer ask for the customer's name at the start of the call for the purpose of engagement?

Why:

- Simple and effective way to instantly personalise the interaction and promotes easy and natural rapport

How:

- Prior to proceeding into the body of the interaction the officer asks for the customer's name as a rapport building mechanism
- Is not scored a yes when the customer's is asked purely for transactional purposes

Example:

- "Before we begin, do you mind if I ask you your name"
- "Can you tell me your name please"

2-NEEDS IDENTIFICATION & CLARIFICATION**2:1****Clearly Listened****POINTS: 4****Scoring:**

Yes/No

What:

Did the officer demonstrate that they carefully listened throughout the call?

Why:

- Demonstrates the officer's attentiveness to the customer
- Avoids the customer having to repeat information that they already provided
- Listening to the caller is the first step in identifying the customer's needs

How:

- The officer is clearly attentive to the caller and does not sound/seem distracted
 - The officer does not go off on a tangent because they haven't been listening
 - The customer does not have to constantly repeat the same information
 - The customer does not have to bring the officer back on track
-

2.2	Asked Appropriate Questions	POINTS: 8
Scoring:	Yes/No/NA	
What:	Did the officer use an appropriate mix of open and closed questions related to the query and when necessary asked the right questions to clarify/uncover the key motive for the call?	
Why:	- Establishing the customer's requirements is essential in providing a resolution - Asking appropriate questions helps the officer to focus on the reason for the call and allows them to resolve it in an efficient, structured and organised manner - Sometimes customers have difficulty expressing themselves or are unsure of what they need to ask for. Asking appropriate questions helps the officer to narrow in on the customer's needs by exposing the key motive for the call - Avoids offering solutions based on assumptions or incomplete information - Avoids unnecessary callbacks and complaints due to assumption based solutions	
How:	- The officer asks questions directly relevant to the call - The officer asks relevant questions and correctly identifies the customer's needs - The officer asks enough relevant questions to enable other business units within council to fulfill/act on the customer's request appropriately eg: for service requests - May be marked NA only when the call is of a simple nature and the reason for the call is unambiguous	

3-NEEDS RESOLUTION

3.1	Answered All Customer Questions	POINTS: 5
Scoring:	Yes/No	
What:	Did the officer answer all of the customer's questions including the query as initially posed and any additional questions that arise throughout the interaction? Did the officer attempt to assist with questions that are outside of Councils remit?	
Why:	- Is an important part of resolving all the needs of the customer - Even if the enquiry is outside of Council's jurisdiction the officer should offer assistance/advice on how to find the answer to the question - Avoids the customer having to callback	
In		
How:	- The officer provides the correct answer to the initial query - The officer answered subsequent questions that arose during the interaction - The officer displays good product knowledge and/or retrieved information quickly using relevant systems such as Council Assist - The officer endeavoured to assist with non-council related issues e.g. by trying to find who the customer may be able to contact by using Google etc.	

3.2	Provided Appropriate Outcome	POINTS: 8
Scoring:	Yes/No	
What:	Did the officer provide the appropriate solution to resolve the customer's query?	

Why:

- Receiving an appropriate solution to their query is the fundamental reason the customer calls
- Even if the customer is not necessary happy with the outcome the solution provided is the correct solution for the situation
- Any follow-up actions required by the customer are clearly explained to avoid further issues

How:

- The officer has provided the appropriate outcome based on the customers stated needs but also on any unstated needs that were the key motivation for the call
- If a request was entered into merit the information in the merit was clear, accurate, relevant and provided enough detail to ensure that the request could be actioned efficiently
- The officer didn't resolve the enquiry due to circumstances outside their control but the actions taken were appropriate to the enquiry
- The information/solution provided to the customer was clear, complete, accurate and relevant to their enquiry
- The officer avoided offering personal opinion/advice

3.3	Explained Process	POINTS: 4
Scoring:	Yes/No/NA	
What:	Did the officer explain what if any action the customer needs to take and what action the Council or a 3 rd party will take to resolve the issue?	

Why:

- Explaining what is going to happen is key to managing the expectations of the customer
- Prevents customer confusion and misinterpretation
- Gives the customer the opportunity to clarify their understanding
- Allows the officer to resolve any confusion or misinterpretation as they occur

How:

- Officer explicitly explains to the caller what steps will be taken to resolve their query, including timeframes that an issue can be expected to be resolved by (if applicable) and any follow-up actions that may be required
- Is not required if the enquiry and response is very basic in nature

Example:

- "the bin will be replaced within 3-5 working days"
- "when we receive your appeal you infringement will be put on hold..."

3.4	Provided Further Relevant Information	POINTS: 3
Scoring:	Yes/No/NA	
What:	Did the officer provide relevant info such as merit request number, receipt or offer to email a form	

Why:

- Assures the customer that their query has been logged and will be actioned
- Is a reference for the customer to use in case they need to call back saving them the inconvenience of having to explain the situation again
- Provides the customer confidence that the payment has been correctly processed
- Saves the customer the hassle of having to look for forms on the website

How:

- By quoting the correct Merit/receipt number to the customer
 - By advising the caller what the Merit number is for
 - When possible/appropriate forms are emailed to the customer rather than being referred to the website
-

4 – ENGAGEMENT

4.1 Used Customer Name POINTS: 2

Scoring:

Yes/No/NA

What:

Did the officer refer to the customer by name during the call?

Why:

- Demonstrates to the customer that the officer is interested in them as a person
- Helps communication proceed on a more personal level
- When a caller voluntarily provides their name, using during conversation confirms that you have been listening to them

How:

- The officer used the customer's name at least once during the conversation
- When asking a question
- When taking the customer off hold

Note:

1 – Simply using the customer's name at the end of the call is not enough to pass this criteria as it has no impact on the reasons why we use the name in the first place- see why above...

2 – Must be done with a positive friendly tone

3 – Overuse of customer's name can sound forced and insincere

4 – Must use customer's preferred title once it has been established

4.2 Customer Focus POINTS: 6

Scoring:

Yes/No

What:

Was the focus of the officer on resolving the customers query at all times throughout the call?

Why:

- Is that basic expectation of the customer
- Demonstrates to the customer that the officer has their full and undivided attention
- Ensures that the customer doesn't have to be on the phone for any longer than necessary

How:

- The agent is entirely focused on resolving the customers call
 - The agent is not distracted by anything unrelated to resolving the call e.g. gets involved in an unrelated conversation with a colleague while the customer is on hold
 - The call is not unduly extended for reasons outside any activity required to resolve the call
-

4.3 Maintained Contact POINTS: 3

Scoring:

Yes/No

What:

Did the officer keep the customer maintain contact with the customer during the call?

Why:

- Avoids long periods of awkward silence
- Keeps the customer engaged in the process
- Gives confidence to the customer that they haven't been forgotten
- Avoids confusion

How:

- Officer responds immediately when the call drops in
 - Officer responds by actively listening using phrases such as "I see", "ok" etc.
 - Officer informs customer of their actions "...I'm just looking up that request now for you to find out what the status is"
 - Ensure that not more than 10secs pass before advising a customer what is happening
 - Officer did not putting customer on hold unnecessarily
-

4.4	Avoided Interrupting	POINTS: 3
Scoring:	Yes/No	
What:	Did the officer avoid interrupting or talking over the customer throughout the call?	
Why:	• Suggests that the officer is more focused on the process than the customer • Avoids the officer making assumptions about the needs of the customer • Interruptions can convey that the officer doesn't have the time or is uninterested in helping the customer	
How:	• The officer avoids interrupting and lets the customer finish speaking before talking • The officer avoids talking over the top of a customer • At times it may be necessary for the officer to politely interrupt to control the call i.e. when the customer is repeating information unnecessarily	

4.5	Avoided Frustration/Impatience	POINTS: 6
Scoring:	Yes/No	
What:	Did the officer avoid conveying any signs of anger, frustration or impatience throughout the call?	
Why:	• Anger, frustration and impatience on the officer's part can alienate and anger the customer. • Shows that the officer is fully engaged with the customer • Promotes a positive experience for the customer	
How:	• There were no instances of the officer sighing, talking too fast or over the top of the customer • The officer avoids phrases that clearly show frustration or impatience i.e. "...now listen to me!", "...you're not listening to me!", "you've already told me that!"	

4.6	Respectful Tone	POINTS: 8
Scoring:	Yes/No	
What:	Did the officer maintain a respectful to the customer throughout the call?	
Why:	• A respectful tone is fundamental to engaging and building rapport with customers on an emotional level • In the absence of visual cues the officer's tone of voice is the equivalent to body language when assisting customer's face to face • Treating people with respect is a core component of CGD's REACH values and a fundamental right of the customer	
How:	• In assessing the tone of voice it is imperative to only reward that which has clearly influenced a positive customer experience throughout the call • When assessing the tone, if there is any doubt as to if it was positive or appropriately businesslike then it should not be rewarded • Customer Service Officer avoided negative tones/phrases that objectively sound abrupt, confrontational, rude, disinterested, sarcastic etc.	

4.7	Professional / Courteous Language	POINTS: 4
Scoring:	Yes/No	
What:	Did the officer avoid using slang, profanity or inappropriate words? Did the officer use polite and respectful language throughout the call?	

Why:

- Is a basic right of a customer to be treated in a respectful way
- Avoids alienating or upsetting the customer
- Promotes confidence that the officer is attending to the customer's needs appropriately
- Promotes the positive image of the organisation as professional and approachable

How:

- The officer does not use slang, profanity or inappropriate language, phrases or expressions (i.e. "... no worries love/dear)
- Officer avoids excessive casual language such as yep, yeah etc.

4.8	Appropriate Modulation / Energy	POINTS: 4
Scoring:	Yes/No	
What:	Did the officer appropriately modulate their energy (ie: pace and volume of their voice) to suit the nature of the call?	

Why:

- Fundamental to creating and maintaining caller engagement
- Using an appropriate energy level reassures customers that their query is important
- Failure to use an appropriate level of energy with angry callers may contribute to their agitation
- Not using an appropriate energy levels may make it difficult for the caller to understand you eg: talking too quickly or quietly may make it hard for a customer to hear what is being said

How:

- The officer was audible throughout the call
- Officer used an energy level that was appropriate to the personality and/or nature of the call by modifying pace and volume accordingly
- When dealing with an agitated or angry customer, officer did not match caller energy but used an energy that was calm and non-confrontational

4.9	Spoke Clearly	POINTS: 4
Scoring:	Yes/No	
What:	Did the officer have good diction and spoke and intelligibly?	

Why:

- To be able to convey what at times can be complex or detailed information the officer must speak clearly and not mumble, sound hesitant or confused
- Promotes confidence in the information/service provided
- Avoids customer becoming frustrated due to not understanding the officer

How:

- The officer used clear diction and their speech was clear and intelligible throughout the call
 - The officer delivered information in a systematic, logical and coherent flow
 - The officer did not mumble, sound hesitant or unsure of information provided
 - The officer got to the key points of the query quickly and didn't waffle on or repeat information needlessly
-

4.10	Avoids Jargon	POINTS: 2
Scoring:	Yes/No	
What:	Did the officer avoid using or explain any jargon used by them during the call?	

Why:

- Use of jargon can alienate customers and make them feel stupid
- Can create misunderstandings with the customer as officers may assume that the customer understands what they are talking about
- Most customers will not ask for clarification of any jargon used and therefore may not have a complete understanding of the information provided

How:

- Officer avoids jargon that is clearly specific to the organisation with no explanation to the customer
 - Customer sounds confused by the language the officer is using
-

4.11	Empathy	POINTS: 5
Scoring:	Yes/No/NA	
What:	Did the officer clearly acknowledge any concerns/feelings the customer had and empathise with them?	

Why:

- People expect their feelings to be validated which is why they will express negative emotions
- Failure to acknowledge a complaint may further inflame the situation
- Acknowledging customers concerns/feelings demonstrates that the officer is listening
- The ability to understand the emotional state of others by looking at the problem from their perspective is an important part of resolving complaints and effectively managing calls

How:

- The officer provides a strong and clear statement validating how the customer feels about the failure of the service without judgment
- The officer provides a strong and clear empathy statement validating how the customer feels as a result of the product/service failure

Example:

- "...I can see how that would be frustrating for you"
 - "...I can understand that you're clearly unhappy with this situation"
 - "...I'm sorry to hear that"
-

4.12**Scoring:****What:****Developed Rapport**

Yes/No/NA

Did the officer attempt to build rapport with the customer?

POINTS: 3**Why:**

- Creates a positive connection with a customer and is an important element in developing trust
- Contributes towards a customer feeling that their needs have been heard and that they have been treated as an individual
- Developing rapport with a caller can help deflect anger from being personally directed to the Customer Service Officer when the customer is upset. This is because psychologically it is difficult for a person to direct anger to someone they have already engaged with on a personal level

How:

- There is clearly a friendly tone and the "vibe" of the call is positive throughout
- If the customer seeks to engage the officer during the call the officer clearly reciprocates the gesture (i.e. Customer: "...how's it going?" Officer: "I'm well thanks, yourself?")
- Officer has consistently dealt with the call in a way that the caller clearly appreciates through verbal queues eg: by stating "Thanks for your help" or "...you've been great" etc.
- Not required if customer is clearly upset and the officer feels that to attempt to develop rapport will exacerbate the situation
- Not required if enquiry is of a very short nature and an opportunity to build rapport is not present

Example:

- "How are you today?"
- "Looking forward to the weekend?"
- Responding to queues from the caller Eg: if a caller is ringing to register an animal you may be able to make a personal connection such as "...aren't pets great to have around?"

5 – HOLD/TRANSFER PROCESS**5.1-CRITERION:****Sought Permission****POINTS: 1****Scoring:**

Yes/No/NA

What:

Did the officer get the customer's permission to put them on hold?

Why:

- Some customers may not like to be put on hold and would rather listen on the line to the officer investigating their enquiry
- Customers may not have time to hold and may need to call back

How:

- The officer clearly asks if it is okay to put the customer on hold and waits for an answer before doing so

5.2-CRITERION:**Advised Reason****POINTS: 1****Scoring:**

Yes/No/NA

What:

Did the officer advise the customer why they need to be placed on hold or transferred?

Why:

- Keeps the customer informed
- Lets the customer know that the officer is taking action to investigate the enquiry

How:

- The officer clearly advises the customer why they need to be put on hold or transferred
-

5.3-CRITERION: Updated Within 2 Minutes POINTS: 3

Scoring: Yes/No/NA

What: Did the officer get back to the customer within 2 minutes?

Why:

- To avoid confusion
- To reassure the customer that they have not been forgotten
- To ensure officer keeps the customer informed of what is happening
- The customer may not have the time to stay on hold too long and may require a callback

How:

- The officer gets back to the customer within 2 minutes
- If the officer requires more time to resolve the enquiry they get back to the customer within 2 minutes to advise them of this

6.2-CRITERION: Warm Transfer POINTS: 2

Scoring: Yes/No/NA

What: Did the officer complete a warm transfer?

Why:

- Avoids the customer becoming frustrated by having to repeat their enquiry to another person
- Helps the person who will take the call prepare to deal with the enquiry making for a more efficient service for the customer

How:

- The officer speaks to the person who will be taking the call, advises them who is calling and what the enquiry is about prior to putting the call through

5.4-CRITERION: Thanked for Holding POINTS: 1

Scoring: Yes/No/NA

What: Did the officer thank the customer for holding?

Why:

- Having to wait on hold is an inconvenience to the customer
- Lets the customer know that you appreciate that their time is important

How:

- The officer explicitly thanks the customer for being on hold/waiting
- The officer avoids expressions such as "...are you there?" etc

7 – CALL CLOSE (Not applicable to transferred calls)

7.1-CRITERION: Summary POINTS: 3

Scoring: Yes/No/NA

What: Did the officer summarise the key points of the call?

Why:

- Summarises key call outcomes and next steps for the customer
- Reinforces the value the officer has provided to the customer
- Promotes customer confidence in the process

How:

- The officer provides a clear summary highlighting the key outcomes of the call

Note:

- A summary is not required for basic calls that don't require further action from the customer

7.2-CRITERION:	Offered Further Assistance	POINTS: 2
Scoring:	Yes/No/NA	
What:	Did the officer ask the customer if there was anything else that they could help them with?	
Why:	• Prompts the customer to ask further questions thus avoiding potential callbacks from the customer • Customers often don't ask further questions even if they want to as they feel like they are being a nuisance • Makes the customer feel that their enquiries are welcomed	
How:	• The officer explicitly asks the customer if there are any other issues that they can help them with	
Example:	• "...is there anything else I can help you with today?"	

7.3-CRITERION:	Call Close	POINTS: 1
Scoring:	Yes/No/NA	
What:	Did the officer close the call appropriately?	
Why:	• Shows the customer that their call has been welcomed • Leaves the customer with a positive customer service experience	
How:	• The officer explicitly makes a positive statement thanking the customer for calling • The officer uses a positive salutation to close the call	
