QA scorecard template

If you're starting or overhauling a QA program, you'll need to create a scorecard. A QA scorecard helps you evaluate all agents on consistent criteria so you can track compliance, identify areas of opportunity, and provide actionable feedback.

Your QA scorecard should cover all parts of the customer-agent interaction and should ideally be kept to no more than 25 items.

The exact criteria will depend on your processes, goals, and service channel, but we've provided a general template below with ideas to get you started.

Script adherence:

- Used proper greeting
- Used proper hold request
- Asked if issue was resolved
- Used proper closing

Agent behaviors:

- Acknowledged the customer's concerns or issues
- Asked probing questions to diagnose the customer's issue
- Used advocacy statements
- Set expectations with the customer around next steps
- Offered proactive guidance
- Used proper tone and pace
- Offered further assistance before closing

Issue resolution:

- Used appropriate resources to assist the customer
- Answered all customer questions correctly
- Resolved the issue

Compliance:

- Read required disclosure statements
- Adhered to transfer or escalation guidelines
- Adhered to hold guidelines
- Verified customer identity using:
  - Card number
  - Contact info
  - DOB
  - Last 4 SSN
  - Mother's maiden name

Sales-specific QA:

- Leveraged upselling or cross-selling opportunities
- Responded to customer objection with approved rebuttal
- Asked for the sale
- Adhered to internal sales processes
- Shared correct product information
- Stayed in the appropriate talk time range