

# Call observation checklist

Call Center: \_\_\_\_\_  
 Staff Member: \_\_\_\_\_  
 Observer: \_\_\_\_\_

Call Start: \_\_\_\_\_  
 Call End: \_\_\_\_\_  
 Date: \_\_\_\_\_

**Call Type:**

- 1. Book a Service
- 2. Make an Inquiry
- 3. Update Customer Info.
- 4. Complaint
- 5. Request for Help
- 6. \_\_\_\_\_
- 7. \_\_\_\_\_

**Inbound:**

- 21. Patient
- 22. Physician
- 23. Payor
- 24. Correspondence
- Outbound**
- 31. Follow-up
- 32. Call-back
- 33. Patient
- 34. Physician
- 35. Payor

**Product/Service:**

- 41. Scheduling
- 42. Pre-Registration
- 43. Collections
- 44. Financial Counseling
- 45. Consumer Referral
- 46. Physician Referral
- 47. Class Scheduling
- 48. Disease Mgt
- 49. Customer Service
- 50. Other Support
- 51. \_\_\_\_\_
- Repeat Call**
- 61. No. \_\_\_\_\_

Category	Criteria	Observation	Rating Max	Total
Opening Greeting	1. Good first impression		1	
	2. Tone - friendly/professional/sincere		1	
	3. Pace - not too fast/slow		1	
Direct				
Transfer	4. Recaps details from transferring agent		2	
	5. Key points noted		1	
Information Gathering	6. Correct questions asked		1	
	7. Understood nature of call		1	
	8. Enough information gathered		1	
	9. Sincere and interested		2	
Tone of Voice	10. Pitch/volume/pace appropriate		2	
	11. Smile		1	
	12. Verbal nods		1	
Listening Skills	13. First time - no repeats		2	
	14. Not interrupted by caller		1	
	15. Concentrated - not distracted		1	
	16. Questioning maintained control		2	
Questioning Skills	17. Questions did not interrupt caller		2	
	18. Sincere		2	
Apologies	19. Given at right time		2	
	20. Not used to fob off/control caller		2	
	21. Given at right time		2	
Information/Advice	22. Relevant/sufficient detail		2	
	23. All questions answered		2	
	24. Noted early in call		2	
Customer's Name Used	25. Not used to interrupt caller		1	
	26. Did not revert to Sir/Madam		2	
	27. Used in close		1	
	28. Converted/identified Sales lead		2	
Sales Opportunities	29. Avoided cancellation/return		2	
	30. Upgrade/extension/accessories		2	
	31. Gave name again		2	
Action Confirmation	32. Time given for call back		2	
	33. Caller confidence in commitment		2	
	34. Caller thanked		1	
Closure	35. No follow-up necessary		2	
	36. Fond farewell		1	
	37. Correct decision		2	
Transfer	38. Caller agreed		2	
	39. Caller given dept. & name		1	
	40. Introduction given		1	
	41. Caller given choice of call-back		2	
Hold	42. Realistic duration given & adhered to		2	
	43. Less than 90 secs (total)		2	