[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

# Customer Service Quality Checklist

*Use this checklist to review one customer interaction at a time. Score what actually happened, not what usually happens, and attach evidence for every low score.*

## Review details

| | |
|---|---|
| **Agent reviewed** | [Full name of the agent reviewed] |
| **Reviewer** | [Full name and job title of the reviewer] |
| **Date of interaction** | [Date of the interaction reviewed] |
| **Channel** | [Channel of the interaction reviewed] |
| **Case or call reference** | [Case or call reference number] |

## Scorecard

For each criterion, tick Yes, No, or Not applicable. Criteria marked as auto-fail cause the whole review to fail, however well the rest of the interaction scored.

| Criterion | What good looks like | Yes | No | Not applicable |
|---|---|---|---|---|
| Greeting and identification | The agent greeted the customer professionally, gave their name, and confirmed the customer's identity where required. | | | |
| Listening and understanding | The agent listened without interrupting, asked clarifying questions, and confirmed the customer's need before acting. | | | |
| Accuracy of information | All information and advice given was correct and complete for the customer's situation. | | | |
| Resolution | The customer's issue was fully resolved, or a clear next step with an owner and a date was agreed. | | | |
| Empathy and tone | The agent | | | |

| | | | | |
|---|---|---|---|---|
| | acknowledged the customer's feelings and kept a calm, professional, and helpful tone throughout. | | | |
| Clarity and language | Explanations were clear and free of jargon, and any written reply was checked for spelling and grammar. | | | |
| Process and compliance | Required verification, consent, and record-keeping steps were followed, and the case was categorised correctly. | | | |
| Notes and follow-up | Notes are complete enough for a colleague to continue the case, and any promised follow-up was created. | | | |
| Closing | The agent summarised the outcome, confirmed the next steps, and offered further help before closing. | | | |
| Data protection (auto-fail) - auto-fail | No account or personal information was shared with the wrong person, and personal data was handled correctly. | | | |

## Score

| Criteria scored Yes | |
|---|---|
| **Criteria scored No** | |
| **Criteria marked Not applicable** | |
| **Overall score (Yes divided by Yes plus No, as a percentage)** | |
| **Auto-fail triggered** | [Yes or no] |
| **Overall result** | [Pass or fail] |

## Coaching notes and agreed actions

What went well:

_____

_____

## [Company name]

What needs to improve:

_____

_____

Agreed action and date:

_____

_____

| | |
|---|---|
| **Reviewed by** | [Full name and job title of the reviewer] |
| **Date reviewed** | [Date this review was completed] |
| **Discussed with agent on** | [Date this review was discussed with the agent] |