[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.			

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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:

_____

_____

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]