

Call Quality
Representative Self Evaluation

Date of Call: _____ Call ID # _____

Call Duration: _____ ANI# _____

Did you greet the member with enthusiasm, professionalism, and respect?
 Yes No NA

Points: 5

Did you inform the member of the need for verification?
 Yes No NA

Points: 5

Did you verify appropriately? (Text verification/ out of wallet questions)
 Yes No NA

Points:10

Did you use active listening skills to determine initial member needs?
 Yes No NA

Points: 10

Did you assure the member of assistance in the call concern and display a willingness to help?
 Yes No NA

Points: 5

Did you educate the member on the actions needed for resolution?
 Yes No NA

Points: 5

Did you look for opportunities to enhance the member relationship by introducing products or services that would benefit the member personally?
 Yes No NA

Points: 10

Did you utilize CEM to document the interaction and to provide clear instructions on needs for supporting departments to complete and close event.

Point: 5 Yes No

Did you inform the member of next steps and/or estimated time frame for resolution or follow up, if needed?

Yes No NA

Points: 5

Did you thank the member for calling or for being a loyal member, ask if you could be of further assistance, and end the call with an appreciation?

Yes No NA

Points: 10

Did you maintain a professional tone and demeanor throughout the entire call?

Yes No NA

Points: 10

Did you minimize hold times and check in frequently if a hold was needed?

Yes No NA

Points: 5

Was the call handled effectively and efficiently following the efficiency expectations for that queue?

Yes No NA

Points: 5

Did you maintain and/or enhance the member's self-esteem by utilizing empathy statements or demonstrating an understanding of the situation?

Yes No NA

Points: 10

Total Points:

Summary of call:

Was this a first call resolution contact? If not, why?

In what ways did you deliver the Langley experience? (Make a difference, Make it easy, Do the right thing)

What is an area you will focus on in the future?

Does this member utilize self-services options? If not, what products might have been an option worth introducing to the member?

- Online banking
- Telephone banking
- Account alerts
- eStatements
- Card Manager App
- Bill Pay

Representative _____ Team Leader _____ Date: _____