

Call Monitoring Form Template



Agent Name							
Product							
Client							
Call Date							
System ID (Call ID Number)							
Type of Call (Inbound, Outbound)							
Type of Caller (HCP, Patient/Consumer, Other)							
Primary Reason for Call							
Call Scenario							
Compliance		Score	Weight	Points Available	Value for Score	Comments	Description
1	Provided disclaimers in accordance with program requirements	1	1	1	1		Did the agent provide all required disclaimers in their entirety?
2	Responded in a way that is limited to the caller's inquiry	1	4	4	4		Does the agent respond to the specific customer's inquiry without expanding beyond the customer's inquiry with an exception for relevant safety information.
3	Appropriately identified a potential Adverse Event or Product Quality Complaint	1	5	5	5		If stated, identify all Potential Adverse Event (PAE) or Product Quality Complaint (PQC).
4	Appropriately handled a potential Adverse Event or Product Quality Complaint	1	5	5	5		If stated and identified, acknowledge Potential Adverse Event (PAE) or Product Quality Complaint (PQC) and transfer caller immediately to appropriate channel or state appropriate language.
Soft Skills							
Customer Greeting		Score				Comments	Description
5	Appropriately greeted caller and identified self and organization	1	1	1	1		Agent introduces self by name and title and provides program name. Offered assistance.
6	Requested name and required demographics	1	1	1	1		Collected/ confirmed appropriate demographic information or confirmed HCP.
Identifying and Meeting Customer's Needs		Score				Comments	Description
7	Asked relevant clarifying questions to accurately identify caller's inquiry	1	1	1	1		Does agent ask probing/clarifying questions to ensure adequate understanding of customer's needs? Does agent ask check back questions to ensure customer understanding? Would the use of probing and check back questions provided a better customer experience?
8	Took the lead, used ownership phrases, and promoted confidence in resolving the inquiry	1	1	1	1		Does the agent use ownership phrases such as "I'd be glad to help you"? Is the agent confident in their delivery of information? Does the agent sound confused or unsure of how to proceed when responding to the caller's inquiry?
9	Handled caller's needs in a clear and organized manner	1	1	1	1		Does the agent navigate smoothly through the call? Is the call organized and does the agent transition effectively to address the caller's needs?
10	Listened actively and limited need to ask caller to repeat information	1	1	1	1		Does the agent ask the caller to repeat information, reason for call, etc., that was clearly stated by the caller?
Communication Skills		Score				Comments	Description
11	Used appropriate volume, pace and voice tone. Words were clearly enunciated and properly pronounced.	1	1	1	1		Is the agent's rate of speech too rapid for the caller to easily record or absorb information? Are words clearly enunciated and clearly pronounced? Is the tone upbeat and warm or does it sound robotic or scripted?
12	Established rapport, demonstrated empathy and diffused angry callers when appropriate	1	1	1	1		Did the agent use effective empathy phrases such as "I'm sorry to hear that happened"? Does the agent acknowledge the caller's feelings and apologize for an unsatisfactory experience?
13	Avoided use of slang/jargon	1	0.5	0.5	0.5		Is there excessive use of vocal fillers ("um", "uh") that negatively impact the call?
14	Avoided repeated use of vocal fillers ("um")	1	0.5	0.5	0.5		Is there excessive use casual language ("no prob", "you guys") that negatively impact the call?
15	Avoided dead air	1	0.5	0.5	0.5		Is there excessive unexplained 'dead air'?
16	Maintained business professional relationship	1	1	1	1		Curse words, rude behavior, purposefully disconnecting or providing unscripted medical advice/ opinions are examples that would result in deduction here.
17	Avoided interrupting caller	1	1	1	1		Does the agent allow the caller to speak freely, or do they interrupt and/or talk over the caller? Or does the agent speak over the caller without an apology?
18	Used proper hold and transfer techniques	1	1	1	1		Did the agent ask permission to place the caller on hold? Did the agent provide an estimated hold time? Did the agent check back in with the caller after exceeding the estimated hold time? Did the agent thank the caller for holding upon return?
Closing						Comments	Description
19	Asked if caller had additional inquiries prior to call completion	1	1	1	1		Does the agent ask if the caller has any additional inquiries prior to concluding or transferring the call?
20	Appropriately closed call	1	1	1	1		Does the agent ask if the caller has any other questions prior to concluding the call or transferring the caller? Does the agent thank the caller? If the call is transferred, does that agent provide the direct line and website, unless caller is rushed?

Score 100%