



# ENCO Call Quality Control

QA- Quality Assurance

# Ruby M. Irigoyen

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Senior VP Customer Services



ENCO Utility Services  
Office: (951) 925-8092  
Cell: (951) 236-1571  
[www.encous.com](http://www.encous.com)

## Quality Assurance Goals and Responsibilities

The **Call Center Goal** is that *we* as a team answer our customer's needs in an uniform matter. The customer will receive the same great service from each one of us every time they call.

*The customer is calling because they need our help and we are here because of them.*

All calls are recorded and all customer service staff calls are listened to live by our Call Center Supervisors.

# Quality Assurance Goals and Responsibilities (CONT.)

## CSR Requirements:

- ▶ Our Goal is that every call from our CSR's receives a 100%.
- ▶ If a CSR scores under a 100% they are required to use the coaching provided by their supervisor to improve future scores.

## Supervisor Requirements:

- ▶ At least 3 graded monitored calls per month per CSR
- ▶ At least 1 hour of side by side monitoring with one on one immediate (documented) coaching (BI-WEEKLY)
- ▶ Ask the CSR's for feedback to help your monitoring in the future. What works, what could work better and how you can improve.
  - ▶ The supervisor can choose:
    - ▶ Previously recorded calls
    - ▶ Live monitoring
    - ▶ Side-by-side monitoring

# CALL MONITORING CHECKLIST

**Greeting 5 Points**

Thank you for calling Customer Service this is \_\_\_\_\_ How may I help you? 5

**Identified Customer 15 Points**

Asked for Address (May I have your service address please)/Account Number and name of person calling 5

Verified SSN/Other 5

Acknowledge that we can help with the call 5

**Identified Customers Needs 5 Points**

Purpose of Customers Call/Listened to Customer Needs/Expressed Empathy for Customer Situation 5

**Research Account 30 Points**

Read Notes on Account to Obtain Proper Information 10

Asked Cust to Hold for Research of Account/Advised Cust of Progress During Hold Time (If Applicable) 10

Completed Research and Gave Correct Information to Customer 10

**Masked CC and/or SSN 10 Points**

Masked CC info or Social Security number 10

**Documentation 20 Points**

Proper Inquiry Used/Processed the Appropriate Service Order (If Applicable) 10

Made Complete & Detailed Notes on Account(s) 10

**Customer Satisfaction 10 Points**

Took responsibility for the call 5

Properly transferred call or gave customer correct number to call (If Applicable) 5

Advised customer, request is complete 5

If request not complete, advised customer of appropriate steps for completion

**Closing 10 Points**

Asked customer if there was anything else you could do 5

Thanked the customer for calling 5

**Additional Comments**

Possible	Actual
Score 100	0

- E=Exceptional (100)
- G=Good (90-99)
- F=Fair (80-90 Needs Work)
- P=Poor (79 & Below Needs Training)

# Quality Assurance Goals and Responsibilities

While monitoring live/recorded calls, the supervisor evaluates and provides coaching for:

- ▶ Proper Greeting
  - ▶ Identify Customer
  - ▶ Identify customer needs
  - ▶ Tone of voice
    - ▶ Soft Skills
  - ▶ Understanding of the policies of the program
  - ▶ Understanding the customer's needs
    - ▶ Active listening
    - ▶ Empathetic
  - ▶ Knowledge
  - ▶ Research Account
  - ▶ Communication
  - ▶ Appropriate Demeanor/Tone
  - ▶ Educating the customer
  - ▶ Build Rapport
- ▶ Use appropriate resources
  - ▶ Use appropriate hold/transfer courtesies
  - ▶ Documentation
  - ▶ Ability to handle calls in a timely manner
  - ▶ Ability to answer callers' questions accurately
  - ▶ Ability to provide a pleasant telephone experience to the caller
    - ▶ Customer Satisfaction
    - ▶ Responsibility for the call
  - ▶ Check for understanding
  - ▶ Set appropriate expectations
  - ▶ Explain resolution
  - ▶ Make sure request is complete or provide steps for completion
  - ▶ Proper closing

# Quality Call Management Guidelines

## Call Flow Management

- ▶ Did the CSR answer the call in 2 rings or less?

## Greeting

- ▶ Did the CSR use a proper greeting with a positive tone?
- ▶ Communication
- ▶ Did the CSR obtain the customer's name and address them in a professional manner?
- ▶ Did the CSR use appropriate demeanor/tone?
- ▶ Did the CSR demonstrate empathy in an appropriate manner?
- ▶ If applicable, did the CSR educate the customer?
- ▶ Did the CSR attempt to build rapport with the customer?
- ▶ Did the CSR check for understanding?
- ▶ Were appropriate expectations set with the customer?
- ▶ Did the CSR explain the resolution to the customer?

- ▶ Did the CSR demonstrate appropriate **negotiation skills**?
- ▶ Did the CSR take ownership of the call?

## Knowledge

- ▶ Did the CSR give the correct information?
- ▶ Did the CSR display confidence when speaking with the customer?
- ▶ Did the CSR use the appropriate resources to assist their customer?

## Call Procedures

- ▶ If applicable, did the CSR extend appropriate hold/transfer courtesies?
- ▶ Did the CSR keep the customer engaged in the call process?
- ▶ If applicable, did the CSR follow the appropriate escalation process?

Call Center Supervisor → Call Center Manager → Ruby.

# Customer call handling

**GOAL: DELIVER THE VERY BEST CUSTOMER SERVICE WE CAN ON EACH AND EVERY CALL.**

Talking to the customers of our clients is very important to our business. We want the customer to feel that their issues are handled with care and that their issues are important to us.

## Step One: Adjust Your Mindset and Your Tone

Once you're aware that your customer is unhappy, then your first priority is to put yourself into a customer service mindset and your tone.

This means that:

- ▶ You set aside any feelings you might have that the situation isn't your fault
- ▶ You set aside any feelings you have that your customer has made a mistake
- ▶ You set aside any feelings that he or she is giving you unfair criticism

All that matters is that you realize that your customer is upset and that it's up to you to solve the problem.

Adjust your mindset so that you're giving 100 percent of your focus to your customer, and to the current situation.

# Customer call handling (Cont.)

## Step Two: Listen Actively

The most important step in the whole of this process is listening actively to what your customer is saying - he wants to be heard, and to air his grievances.

Start the dialogue with a neutral statement, such as, "Let's go over what happened," or "Please tell me why you're upset."

This subtly creates a partnership between you and your customer, and lets him know that you're ready to listen.

Resist the temptation to try to solve the situation right away, or to jump to conclusions about what happened. Instead, let your customer tell you his story. As he's talking, don't plan out what you're going to say when he's done - this isn't active listening!

**TAKE NOTES! ALWAYS...TAKE NOTES**

Also, don't allow anything to interrupt this conversation. Give your customer all of your attention.

# Customer call handling (Cont.)

## Step Three: Repeat Their Concerns

Once he's had time to explain why he's upset, repeat his concerns so you're sure that you're addressing the right issue. If you need to, ask questions to make sure that you've identified the problem correctly.

Use calm, objective wording. For example, "As I understand it, you are, quite rightly, upset because we do not have your power restored yet and you were advised that it would be on shortly an hour ago. Is that correct?"

Repeating the problem shows the customer you were listening, which can help lower his anger and stress levels. More than this, it helps you agree on the problem that needs to be solved.

# Customer Call Handling (Cont.)

## Step Four: Be Empathic and Apologize

Once you're sure that you understand your customer's concerns, be empathic. Show her you understand why she's upset.

And, make sure that your body language and your voice also communicate this understanding and empathy.

For example, you could say, "I understand why you're upset. I would be too. I'm very sorry that we didn't get your power back on in the time we thought we would."

# Customer Call Handling (Cont.)

## Step Five: Present a Solution

*Just a note: Remember it is ok to say, "I do not know, but I will find out and call you back" or "I do not know, but if you wouldn't mind holding on, I will try to find out for you." and then do so.*

Now you need to present her with a solution. There are two ways to do this.

If you're not sure you know what your customer wants from you, or if they resist your proposed solution, then give her the power to resolve things. Ask her to identify what will make her happy.

For instance, you could say, "If my solution doesn't work for you, please tell me what you would propose. If it's in my power I'll get it done, and if it's not possible, we can work on another solution together."

If you feel that you know what will make your customer happy, tell her how you'd like to correct the situation.

# Customer Call Handling (Cont.)

## Step Six: Take Action and Follow-up

Once you've both agreed on a solution, you need to take action immediately.

Explain every step that you're going to take to fix the problem to your customer.

Make sure that the customer has your name and the call center number. This gives the customer a feeling of control because she can get hold of you again if she needs to.

Once the situation has been resolved, make sure that she's happy with the resolution.

Whenever you can, go above and beyond the customer's expectations.

## Step Seven: Use the Feedback

Your last step is to reduce the risk of the situation happening again.

If you haven't already done so, identify how the problem started in the first place. Was there a bottleneck that slowed response? Did we miss any steps in handling the request?

Find the root of the problem and make sure you discuss with your supervisor and or Ruby to ensure that it's fixed immediately.

## Customer Call Handling (Cont.)

### Further Tips:

It's important to handle difficult customers professionally. Learning how to stay calm and how to stay cool under pressure can help you get through challenging situations with grace and professionalism.

If your customer is especially angry, then talk slowly and calmly, and use a low tone of voice. This will subtly help lower the tension, and ensure that you don't escalate the situation by visibly getting stressed or upset yourself.

If you feel that your customer is being unreasonable, you might start to get upset, especially if he or she is criticizing you or your organization unfairly. So practice anger management skills so that you can stay calm in these situations.

Occasionally a customer may become verbally abusive towards you or your team. It is never ok to hang up on a customer. Advise a supervisor and transfer the call to the supervisor.

# Customer Call Handling (Cont.)

## Key Points

Dealing with difficult customers can be challenging. But if you handle the situation well, you may even be able to improve your relationship, and create further opportunities.

Make sure that you listen actively to his problems or complaints, and

Resist the urge to interrupt or solve the problem right away.

Be empathic and understanding, and make sure that your body language and voice communicates this.

If you're not sure how to fix the situation, then ask your customer what will make him happy.

If it's in your power, then get it done as soon as possible.

Follow up with your customer to make sure he was happy with how the situation was resolved.

# Helpful Customer Service Tips

Always open your greeting by thanking the customer for calling.

After all they are the reason we are all here ;)

Thank you for calling customer service my name is \_\_\_\_\_ how may I help you?

Take ownership of the call making the customer feel confident in our work

**I can help you with that...**

Don't forget that you ARE ALWAYS able to help the customer whether it is with assistance lines, an alternate payment arrangement within guidelines, web sites, rebate information, conservation, phone numbers etc.

Always politely ask for information

**May I please have your service address?**

And thank the customer for providing you with that information

**Thank you**

Try your best not to use words or phrases like:

**"Unfortunately" "I'm not sure" "I don't know"**

It makes us sound like we are incapable of assisting the

customer.

Use alternate phrases for example:

**"I'm sorry but we cannot extend you PA request but we can offer you...."**

(It may not be what the customer is asking for but it is an alternative solution instead of a dead end) **or "Let me research that for you"** (Shows the customer that we will look for an answer)

Make sure you have completed everything the customer needs....confirming first call resolution.

**"Is there anything else I can help you with?"**

And always end your call thanking the customer for calling in to us

**"Thank you for calling Mr. \_\_\_\_\_"**

**It really is the *little things* you provide that make your phone call a positive experience for our customers...building trust and reliance!**

# Call Goals for CSR's

## Full Time

Average call time should be 5.47

Approximately 9.375 calls per hour

Average calls per day should be 75

Average calls per week should be 375

## Dispatch

Average call time should be

5.47

Approximately 9.375 calls per hour

Average calls per day should be 75

*Weekly goals based on FT or PT*

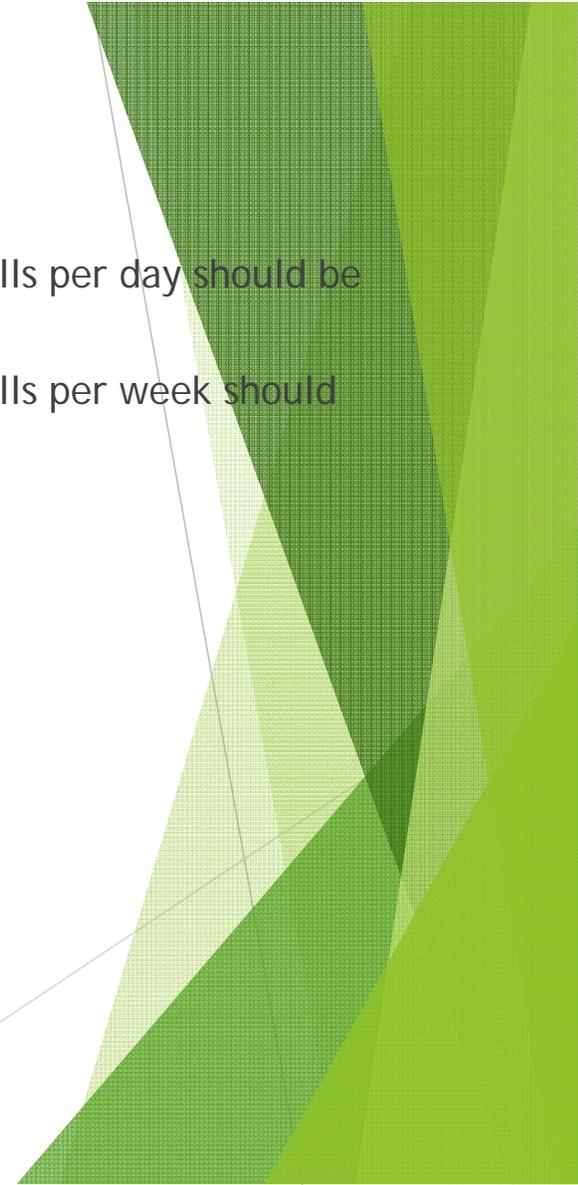
## Part Time

Average call time should be 5.47

Approximately 9.375 calls per hour

Average calls per day should be 75

Average calls per week should be 190



## Customer Service Goals

ENSURE CUSTOMER SATISFACTION  
SOLVE THE CUSTOMER'S PROBLEMS  
MEETS COMMITMENTS TO CUSTOMERS  
SEEKS OUT CUSTOMER INPUT  
MAINTAINS GOOD LISTENING SKILLS  
BUILD STRONG RELATIONSHIPS  
FLEXIBLE/OPEN-MINDED  
SOLICITS CONSTRUCTIVE FEEDBACK  
HANDLES CONSTRUCTIVE CRITICISM

IS ATTENTIVE TO DETAIL AND  
ACCURACY  
COMMITTED TO EXCELLENCE  
LOOKS FOR IMPROVEMENTS  
CONTINUOUSLY

# Customer Service Habits to Develop

- ▶ Be on Time
- ▶ Follow up on your promises
- ▶ Under Promise but Over Deliver
- ▶ Go the extra mile
- ▶ Offer your customer options
- ▶ Express Empathy
- ▶ Treat your Customers as the most important part of your job
- ▶ Treat your Co-Workers as customers
- ▶ Give the customer your name
- ▶ Smile and use inflection on the phone

# SOFT SKILLS

Soft skills are often described by using terms often associated with personality traits, such as:

- ▶ optimism
- ▶ common sense
- ▶ responsibility
- ▶ a sense of humor
- ▶ integrity

And abilities that can be practiced (but require the individual to genuinely like other people) such as:

- ▶ empathy
- ▶ teamwork
- ▶ leadership
- ▶ communication
- ▶ good manners
- ▶ negotiation
- ▶ sociability
- ▶ The ability to teach

## SOFT SKILLS (CONT.)

It's often said that hard skills will get you an interview but you need soft skills to get (and keep) the job.

"Soft skills" refer to a cluster of personal qualities, habits, attitudes and social graces that make someone a good employee and compatible to work with. Companies value soft skills because research suggests and experience shows that they can be just as important an indicator of job performance as hard skills.

Soft Skills are personal attributes that enhance an individual's interactions, job performance and career prospects. Unlike hard skills, which are about a person's skill set and ability to perform a certain type of task or activity, soft skills relate to a person's ability to interact effectively with co workers and customers and are broadly applicable both in and outside the workplace.

Soft Skills are behavioral competencies. Also known as *Interpersonal Skills*, or people skills, they include proficiencies such as communication skills, conflict resolution and negotiation, personal effectiveness, creative problem solving, strategic thinking, team building, influencing skills and selling skills.

## What Are Soft Skills in Customer Service?



- ▶ Significance
- ▶ Identification
- ▶ Considerations
- ▶ Face-to-Face
- ▶ Telephone Skills
- ▶ Internet Skills

## Soft Skills - Key Points

- ▶ Greeting is the first impression the customer gets so make sure there is a smile on your face and your tone of voice is appropriate. Customers can sense if you are genuine or not. It is important to remember that it is not what you say it is how you say it.
- ▶ Gather information - Always get to read all documentation and know the problem or issue before giving any information to the customer. Wrong information can cause an irate customer and make a job much harder. Understanding the issue can researching by using all resources available benefits both the customer as well as the organization and makes your job easier.
- ▶ Build Rapport - It is important to build trust with the customers because they will know that we are committed to them and care about their needs. A commitment to the customer gives a personal touch to customer service
- ▶ Take Ownership - We need to own the call. We need to try to finish the call or take care of the customers' needs the first time. The customer needs to feel confident that you can make decisions that will be able to solve their problems.

## Soft Skills - Key Points (CONT.)

- ▶ Educate the customer - Be knowledgeable on your organization. The customer should be confident that you are a decision maker. Make sure you are clear in any explanation that you give and never assume anything. In educating the customer you might need to gather information and go above and beyond to give the customer what they need. Never make up information or be vague. Words like "I think so" are a no no.
- ▶ Negotiate - most instances this only works when you can help the customer. If the customer issue will not have a resolution that is what they want, this can turn into an escalated call so this can become an instance where you have done plenty of research and know what you are doing.
- ▶ Set Expectations - Under promise and over deliver. Be honest with the customer and be direct and only do what is within your means. This will help the customer know what their options are
- ▶ Resolve the Issue - An issue should be resolved in the first visit or call. This is not always possible, but with great customer service skills the customers' needs should be met or the customer will have a sense of fulfillment of speaking to you and they will know that you will do everything in your power to resolve their issue or problem.
- ▶ Close the call/Contact - Always ask the customer if you were able to handle all of their needs. Thank them for calling or coming in and always ask if there is anything else you can help them with. Also, always let them know you are here to help them.



# SOFT SKILLS

Tune Up 2017

# SOC 2 Compliance

- ▶ The SOC 2 standard is maintained by the American Institute of CPAs. SOC (system and organization controls) is a measure of how well a company conducts and regulates customer information.
- ▶ To become SOC 2 compliant, ENCO was audited by KirkpatrickPrice, an independent CPA firm, who visited our datacenter site and performed an assessment of our availability and security stance. The assessment covered infrastructure, IT system controls, security protocols, recovery processes, and more. The auditors determined that we have the appropriate SOC safeguards and procedures in place to meet the SOC 2 requirements.
- ▶ We are required to establish and follow strict information security policies and procedures, encompassing the security, availability, processing, integrity, and confidentiality of customer data.
- ▶ Our system is designed to keep our customers' sensitive data secure in order to minimize risk and exposure to that data. These SOC 2 standards provide confidence and peace of mind for our customers and our third-party vendors.



# SOC 2 Compliance (Cont.)

## Trust Services Principles that are Critical to Meeting SOC 2 Compliance

### 1. Security Trust Service Principle

ENCO deploys and maintains comprehensive controls that mitigate risks, support business objectives, protect information assets, detect anomalies and vulnerabilities, evaluate security incidents, and effectively manage change.

### 2. Availability Trust Service Principle

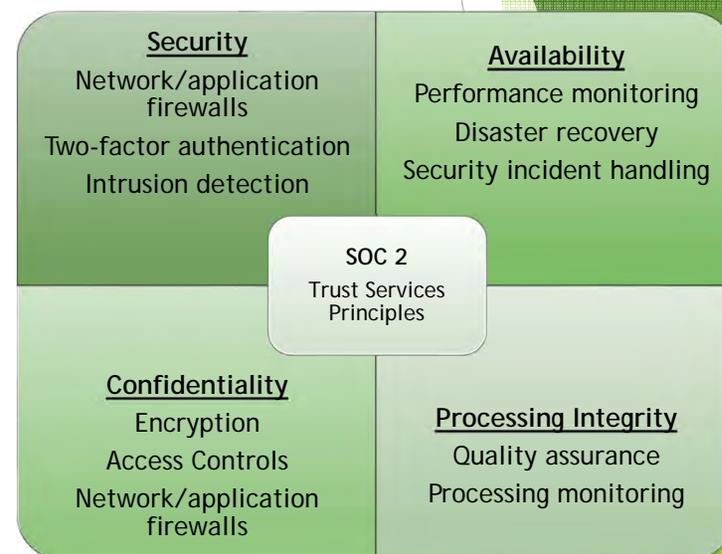
ENCO monitors and evaluates processing capacity and can implement additional capacity if needed. We design, develop, configure, document, test, authorize, and implement environment protections, software, back-up processes, and recovery infrastructure. We also test system recovery plan procedures.

### 3. Confidentiality Trust Service Principle

ENCO has procedures in place to identify and protect confidential information, and for proper disposal of confidential information.

### 4. Processing Integrity Trust Service Principle

ENCO utilizes relevant, quality information to support the use of our services. We implement policies and procedures over system inputs and system processing so that output is available in a complete, accurate, and timely manner.



## To Summarize

- ▶ The Call Center Goal is that *we* as a team answer our customer's needs and provide great service.
- ▶ CSR Supervisors monitor calls to ensure every call from our CSR's receives a 100%.
- ▶ Multiple quality assurance goals and call management guidelines are used to evaluate the performance of our CSR's.
- ▶ Customer call handling techniques are essential to our goal of delivering the very best customer service we can on each and every call.
- ▶ We set additional call goals and customer service goals to help all CSR's develop great customer service habits.
- ▶ All CSR's are trained to build soft skills such as optimism, responsibility, and integrity, which enable them to interact effectively and harmoniously with our customers.
- ▶ ENCO is SOC 2 compliant and we ensure that all customer data is protected from loss or compromise.

# Questions

