

A Checklist to Get You On the Right Track & Make Every Call **Count**

MEASURING SALES & CSR PERFORMANCE EFFECTIVELY

Whether you're starting a call center or evaluating your current call center performance, this checklist shows which metrics are the most valuable to track.



QUALITY ASSURANCE (QA)

- Agents complete their tasks correctly in a customer-centric manner
- Agents speak in a friendly tone and demonstrate active listening
- Greeting them and closing the call appropriately (e.g. Confirming, repeating and asking, "Is there anything else we can do for you today?")
- Agents share all of the necessary information with the customer about their purchase



SERVICE LEVEL

- Answer 80% of calls in approximately 20 seconds
- Average Handling Time (AHT) is approximately 8-10 minutes
- First Call Resolution (FCR) is 85% or higher
- Customer Satisfaction (CSAT), measured by CSAT Surveys or Net Promoter Score (NPS)



WORKFORCE MANAGEMENT

- Staffed appropriately to pick up calls without burdening my own resource
- Don't have too many agents waiting for calls to come in
- Understand historical call arrival patterns
- Forecast and plan for absenteeism: lunch breaks, days off, after call time to ensure the right amount of coverage

Remember: If you don't have enough agents to answer each call, none of these metrics matter. You don't have to hire more agents for the busy season; partner with Slingshot and get the right level of coverage to scale your business.

DO YOUR STATS MEASURE UP?

Use this scorecard to record valuable metrics and see how your agent stats measure up to the industry standard goal.



AGENT SCORECARD

AGENT NAME: _____

DATA MEASURED FROM: _____ TO _____
MM/DD/YYYY MM/DD/YYYY

METRIC	STATS	INDUSTRY STANDARD GOAL
Schedule Adherence		>90%
FCR% - First Call Resolution		>85%
QA Score		>90%
Close Rate		>55%
Save Rate		>30%
Friendliness Score		>4.9
Friendliness Survey %		>35%
ACW - Average After Call Wrap		<00:01:00
APT - Average Preview Time		<00:00:30
ATT - Average Talk Time		<00:04:00
AHT - Average Handle Time		00:08:00 - 00:10:00
On Call Percentage		N/A
Ready Percentage		N/A