

VBA Quality Management Call Quality Evaluation Guide

Provided by Appeals Management Office

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This document is a guide is to be used as a desktop reference while reviewing calls.



VBA Call Quality Evaluation Guide

1. Purpose

This document is a guide to be used as a desktop reference while performing call monitoring reviews. While it contains “how-to” information for scoring call contact criteria, it is not intended to cover every scenario which may be encountered during call monitoring.

2. Using the Scorecard

GREET AND VERIFY

What should evaluators listen and look for?

The key to the greeting is a professional, strong opening that allows the Contractor to immediately take control of the interaction to ensure that the caller experience is respectful, efficient, and outcome oriented. It’s crucial that the Contractor guide the caller through the initial stages of the interaction quickly allowing for the most time possible to answer inquiries or resolve issues presented. It is also critical that the Contractor asks all necessary ID protocol questions to ensure that the claimant’s privacy is protected at all times.

Objectives

- Establish rapport in a friendly/neutral voice
- Provide complete and accurate information
- Identify VA and self
- Identify caller
- Ask all required ID protocol questions
- Provide information in accordance with the Privacy Act and Freedom of Information Act (FOIA)
- Show appreciation for the Veteran’s service

Desired Outcomes

- Caller knows the name of the Contractor they are speaking with – which helps them feel like someone is accountable
- Caller feels respected, and that their privacy is protected
- Contractor gets the correct record up quickly and informs caller if additional information is needed

Scoring Criteria:

The approved greeting is:

Good _____, my name is _____ and I'm calling on behalf of the VA or (Department of Veterans Affairs).

It is acceptable for Contractor to change some of the wording of the required opening, as long as the required parts of the opening are provided. Listed below is what would be considered the required parts of the opening and some examples of the variations that are acceptable:

- VA (Department of Veterans Affairs)
- Name of Agent (This is _____, _____ speaking, etc.)

TECHNICAL ACCURACY**What should evaluators listen and look for?**

Contractors should not deviate from the Government provided script and frequently asked questions (FAQ). Should the Contractor receive a question that is out of scope, the Contractor should offer to transfer the call to the VA National Call Center (NCC), or at minimum, provide the caller with the appropriate telephone number.

Objectives

- To ensure information regarding Appeals Modernization and RAMP is presented in a manner that is easily understood by the Veteran/Appellant.

Desired Outcomes

- The Veteran/Appellant is informed of Appeals Modernization
- The Veteran/Appellant is informed about RAMP, and his/her options are (Higher Level Review lane or Supplemental Claim lane)

Scoring Criteria:

- Full points will be awarded if the Contractor presents the information as stated in the script

COMMUNICATION SKILLS**What should evaluators listen and look for?**

The communication skills component ensures that the Contractor maintains high personal standards throughout the call and provides an overall exceptional caller experience.

Throughout the call the Contractor should maintain a positive attitude and provide the utmost courtesy and respect to the caller, regardless of the situation or the behaviour of the caller. Communication skills are keeping emotions in check, keeping the call on the issues raised, and always maintaining the highest degree of customer service.

Objectives

- Caller feels respected throughout the call
- Show genuine interest and empathy towards the caller's issue(s) (if presented)
- Communicate with language and terminology that the caller will understand

Desired Outcomes

- Sounds welcoming and ready to engage with the caller
- Uses the words "please" and "thank you" throughout the call when necessary
- Shows respect by listening carefully and demonstrating that the Contractor is ready to spend the time necessary with the caller
- Tone is positive and uses varied pitch and inflection
- Limited use of acronyms, abbreviations, or language unknown to the typical caller
- Acknowledges any emotion exhibited by the caller
- If the Contractor did not maintain appropriate courtesy and professionalism throughout the call, no points will be awarded. Some examples of poor courtesy and professionalism include:
 - Inappropriate, lengthy or multiple hold(s)
 - Failed to ask permission to place caller on hold
 - Failed to apologize for lengthy hold
 - Addressed caller by his/her first name
 - Used curt/rude tone or was condescending
 - Used profanity
 - Made unprofessional comments regarding the VA, the President, government employees, other government agencies, etc.
 - Not actively listening
 - Distracted/disinterested
 - Interrupted/talked over caller

- Used slang/casual language
- Failed to offer condolences
- Advised caller who mentioned a death to “have a nice day”, “have a good day” or uses another unsympathetic statement.
- Spent too much time talking about non-business related topics
- Eating/chewing gum
- Placed caller on hold to make an outbound call
- Accesses internet for personal use, personal IM conversation, personal email during call
- Personal conversation with co-worker during the call
- Contractor inappropriately disconnected the call

CALL EFFICIENCY

What should evaluators listen and look for?

This component ensures that time is spent wisely during the call, and that the time is only used to deliver the required information. Extraneous conversations regarding subjects out of scope for the call (i.e., other pending claims, conversations regarding world events, etc.) should be eliminated.

Objectives

- Ensure the required information is delivered
- Extraneous conversations are eliminated
- Maintain control of the call

Desired Outcomes

- Ensures call does not take longer than necessary
- Ensures sufficient time is allowed for the Contractor to make the number of calls required to meet contractual obligations

Scoring Criteria:

- If the Contractor effectively controlled the call, full points will be awarded.
- If the Contractor failed to manage the time and call flow, a rationale must be provided. No points will be awarded. Some examples of poor call control include:
 - Multiple holds
 - Discussion of topics not related to the issue
 - Contractor failed to get to the answer efficiently

- Contractor not actively listening

CLOSING

What should evaluators listen and look for?

Closing the interaction confidently continues the theme of respectful control with the caller. Appreciation for the contact and reassurance that each issue presented has a resolution or next step builds greater confidence in the caller that his/her reason for calling has been appropriately understood, documented, and managed.

Objectives

- Impart the feeling that the caller is both valued and appreciated
- Confident conversation ending
- Assurance that follow through on promised actions will be accomplished

Desired Outcomes

- Leave the call on a positive note
- Allows caller to confirm the call is complete and to confirm that the next steps and timing of those next steps are understood

Scoring Criteria:

- If the Contractor used an approved call closing or successfully transferred the call, full points will be awarded.
- If the Contractor failed to use an appropriate call closing, a rationale must be provided. No points will be awarded.

Coaching Comments: The evaluator may enter any comments to assist in the coaching of the Contractor. This block is an overall evaluation of the Contractor's closing and is in addition to the "Rationale" on specific items. If no comments are needed the evaluator may leave blank.