

# How to build a customer service QA scorecard

Track your internal quality score (IQS) to consistently deliver exceptional service



# QA is the key to consistent 5-star service

Delivering exceptional customer service can get harder as you grow — more customers are writing in, new teammates are hired, and additional channels join the mix. How do you make sure that the quality of your customer service scales alongside your business?

Classic metrics like CSAT and NPS give you an idea of how your customers are feeling about your service, but they only tell one part of the story. For a more holistic view of your service quality, it's important to regularly review the conversations between your customers and your team against your **own** standards. This practice is called customer service quality assurance (QA), which is full of perks:

- Ensuring a consistent experience across your agents and channels
- Preventing service quality issues from repeating
- Onboarding and training agents to resolve customer issues efficiently and empathetically
- Revealing where your agents need more support, e.g. better access to resources, etc.
- Uncovering insights that can improve the customer experience, as well as your product or service

## QA with a scorecard is fast and easy

QA looks different for every company because of industry, company size, customer base, and other factors. A typical QA process starts by reviewing and scoring a sample of your customer-agent interactions.

Managers can grade the interactions with an internal quality scorecard, which evaluates your customer service agents' responses against a set of standards like accuracy, tone, and clarity. You can build your scorecard to reflect whatever is important to your customers and your company.

Using a scorecard for your QA is fast and easy to implement (not to mention free ). How frequent you decide to QA your customer conversations depends on your team size and bandwidth.

#### **Front on Front**

Here's a look into how our team how reviews and scores customer interactions:



We have an average of 1,200 conversations per week across channels



We put 2% of total conversations from email and chat through QA



3 support managers review about 6 conversations a week, one from each of our 19 support agents



We use a five-point scale across four categories

Averaging all of your scorecard ratings reveals your **Internal Quality Score (IQS**), which is a valuable metric to understand the overall internal quality of your customer interactions as a team.

## Selecting customer conversations for meaningful review

Not every conversation needs to go through QA. To have more meaningful discussions about supporting customers, it's best to focus on conversations that:

- Reached resolution
- Involved at least two replies
- Occurred recently (e.g. happened in the last week)

You'll want to flag which conversations are disqualified from the QA process, like simple password resets or feature requests.

Once you've decided which conversations are more substantial for review, you'll also want to consider any risks that insert bias. For example, it might be more valuable to assess a conversation between a long-time customer and an agent they've never talked to before.

#### **Front on Front**

- Our team built an automated process using \* Front rules to select conversations that meet our criteria
- Once a conversation is tagged at random \* by the rule, it creates a Discussion using a message template to kick off the QA process with the assigned manager

#### **Patrick Star**

Accuracy

Tone

Clarity

Above & beyond

Re: Missing order

↔ Hi Sandy, Glad you g...

#### O Guide to QA Reviews @ Front.

This week, lets review conversation cnv\_1234567.

The review will focus on the following attributes of my responses:

Sandy Cheeks > Patr... 23M

24

0 F

## Set standards to guide your team in giving stellar customer service

As you begin setting up your scorecard, you'll first need to define and set expectations for what stellar customer service looks and sounds like for your company. Establishing these standards will help guide your agents when they're responding to customers. It'll also help you define your scorecard's categories that the customer conversations will be evaluated against. Here's how to set service quality standards:

Establish your company and/or team values

EXAMPLE: Front's core values are transparency, collaboration, care, high standards, and low ego

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1

### Determine your voice and tone when responding to customers

EXAMPLE: Front's customer service team uses a friendly and casual tone whenever possible

### Make sure your company, department, and/or team policies are accessible

EXAMPLE: how do you handle escalations? Are important policies readily available? e.g. refunds, data and privacy, etc.



#### Define your criteria for stellar customer service

EXAMPLE: we score responses to customer inquiries on accuracy, tone, clarity, and whether or not the agent went above and beyond

## Internal quality scorecard

Duplicate this **Notion template** and make it your own.

#### Scorer name: Date: Week scored: Scorer's summary: Strengths: • List Areas of improvement:

• List

#### Scorecard explanation:

You will be scored on 5 randomly-selected responses that you worked on last week. The goal score is 80%, which means an average of 4's across the board. The areas you will be scored on for each conversation are:

- Accuracy: Did you give the correct answer?
- Tone: Did you speak to the customer in a tone that aligns with the team's support tone?
- Clarity: Was your answer clear and concise?
- Above & beyond: Did you go above and beyond in providing the customer a great experience?

#### Scorecard:

Conversation	🔗 Link	Category	# Score	# Out of	Notes
Conversation 1		Accuracy		5	
		Tone		5	
		Clarity		5	
		Above & beyond		5	
Conversation 2		Accuracy		5	
		Tone		5	
		Clarity		5	
		Above & beyond		5	
Conversation 3		Accuracy		5	
		Tone		5	
		Clarity		5	
		Above & beyond		5	
Conversation 4		Accuracy		5	
		Tone		5	
		Clarity		5	
		Above & beyond		5	
Conversation 5		Accuracy		5	
		Tone		5	
		Clarity		5	
		Above & beyond		5	

## Sample scorecard

Here's an example of what a scorecard looks like when it's filled out for one conversation:

#### Internal quality scorecard for Patrick Star

Scorer name:	Gary
Date:	2/6/2024
Week scored:	1/29/2024 - 2/2/2024

#### Scorer's summary:

Strengths:

- Great job taking steps for initial troubleshooting and working with teammates to learn when needed
- Friendly and professional tone
- Good execution of collecting info and knowing when appropriate to escalate to T2

#### Areas of improvement:

- Be thorough by including screenshots, detailed instructions, formatting (like bold/italic), bulleted lists for clarity, and links to help center articles when possible
- Be clear as possible when asking the customer for information that you need to troubleshoot to prevent additional back-and-forth

#### Scorecard:

Conversation	🔗 Link	Category	# Score	# Out of	💭 Notes
Conversation 1	https://front.frontapp.com/ open/cnv_1234567	Accuracy	5	5	Good job using the tools you have available to you as well as checking in with teammates for clarify when you became unsure
		Tone	5	5	Friendly + professional!
		Clarity	4	5	I think some clarity around Issue A would've been helpful: "this is something that must be resolved with the vendor directly." In your last message, Issu A and Issue B were joined together, but for clarity it might be helpful to address each issue separately.
		Above & Beyond	3	5	It's good practice to provide some info and a help center article here with the topic at hand. They we asking about Feature A and including this help center link ( <u>help.front.com/dummy-article</u> ) would've been a great addition here! You can also use this message template here: (link to canned response)

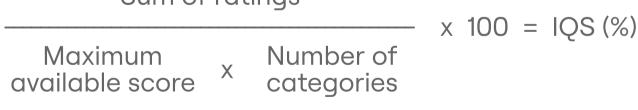
# Follow conversation quality trends over time with IQS

Using a scorecard to review a conversation with an agent is an insightful way to break down the interaction and assess its quality. Here are some evaluation questions to help you grade the response:

- Were the right resources offered, such as help center articles or documentation?
- Was the communication clear, concise, and with the right tone?
- Was there a good understanding of the product or service for an accurate response?
- Was the issue resolved with minimal back and forth?

Once you have the final rating of a scorecard, you can calculate the IQS of a conversation.<sup>1</sup>

Sum of ratings



#### Example

Let's calculate Patrick's IQS from his scored conversation:

 $\frac{(5+5+4+3)}{(5\times4)} \times 100 = 85\%$ 

Customer Service Quality Benchmark Report Klaus

## See service quality at a glance with your team's average IQS

By calculating the average IQS across all of your team's scorecards, you can determine your score as a team.

#### Example

Let's say across your team of five, you take the average across all of their scores to get your team IQS

85% + 100% + 100% + 95% + 95%(individual agent scores) = 95%average IQS
(total number of agents)

Your team's average IQS can be used to set internal benchmarks and goals — so you can to measure, track, and improve how well your team resolves customer issues over time.

Tracking your IQS over time is helpful to see if you're continuously meeting your standards for providing the highest quality service. Our IQS OKR is 99%, and we report on a monthly and quarterly basis. Last quarter, our IQS was 98%. You can see where you stand by comparing to the **industry average IQS of 88%**. Whenever your score dips, you can pinpoint when and why your service was missing the mark.



**Kenji Hayward** Head of Support Front

## How to walk through QA with your team

Regularly going through QA with the scorecard is also helpful for managers to get a current snapshot of their report's work and serves as a topic for professional growth in recurring 1:1's.

Your team might feel nervous about getting their conversations evaluated, but that's where gaining their trust will take you far. You can frame the exercise as a shared learning experience that helps hone their skills in strengthening customer relationships. Here are some tips to build confidence:

- Foster transparency about the expectations of how to best serve customers
- Position the process as a resource to help identify areas of improvement individually and as a team
- Show proactive efforts to upleveling skill set with coaching and mentorship
- Celebrate teammates who are crushing it and use



their interactions as an example

## Before you go: don't forget CSAT and NPS

Since IQS is an internal assessment, it's smart to look at it together with feedback from customers to get a holistic picture of service quality. The two most common ways customers rate a business are the <u>customer satisfaction</u> <u>score (CSAT) and the Net Promoter Score (NPS)</u>.

Each metric gives you a better idea of how you're handling customer service and where you can make the customer experience even better.

Metric	What it measures	How it's collected	Common rating scales
Internal Quality Score (IQS)	The quality of your responses to customer inquiries scored to standards like accuracy, tone, etc.	Scorecards, spreadsheet trackers, QA software	Varies depending on individual companies, but could be point, star, or percentage scales
Customer Satisfaction Score (CSAT)	How satisfied or happy the customer is with the support they received	Post-interaction surveys or feedback ratings	10 point or 5 star scale

Net Promoter Score (NPS) Customer loyalty and satisfaction with a company, brand, product, or service Single-question survey that asks how likely customers would recommend the company to a friend or colleague 10 point scale that's split into three tiers: Promoters, Passives, Detractors



# Uplevel your customer experience

Customers remember exceptional customer service. An internal quality scorecard helps your support team improve customer interactions, track goals for high-quality service, and create happier customers.

Front is the modern customer service platform that helps companies delight their customers, engage their teams, and build stronger businesses. Over 8,500 businesses rely on Front to deliver game-changing service that wins and retains customers for life.

### Try Front for free or request a demo!