Free template included
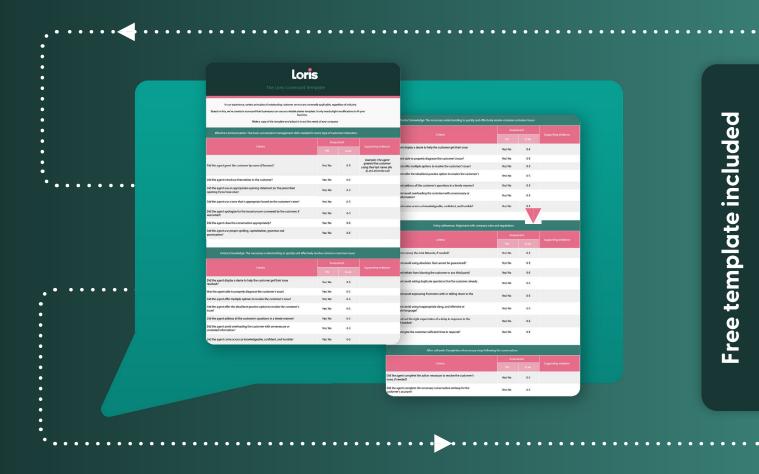
# The Loris Scorecard Template →

In our experience, certain principles of outstanding customer service are universally applicable, regardless of industry. Based on this, we've created a scorecard that businesses can use as a reliable starter template. It only needs slight modifications to fit your business.

# Loris

## The Loris Scorecard Template

In our experience, certain principles of outstanding customer service are universally applicable, regardless of industry.

Based on this, we've created a scorecard that businesses can use as a reliable starter template. It only needs slight modifications to fit your business.

*Make a copy of this template and adjust it to suit the needs of your company*

### Effective Communication: The basic conversation management skills needed for every type of customer interaction.

| Criteria | Assessment | | Supporting evidence |
| --- | --- | --- | --- |
| | Y/N | Scale | |
| Did the agent greet the customer by name (if known)? | Yes/ No | 0-5 | *Example: The agent greeted the customer using their last name (Mr. X) at 0.05 in the call* |
| Did the agent introduce themselves to the customer? | Yes/ No | 0-5 | |
| Did the agent use an appropriate opening statement (or the prescribed opening if you have one)? | Yes/ No | 0-5 | |
| Did the agent use a tone that is appropriate based on the customer's tone? | Yes/ No | 0-5 | |
| Did the agent apologize for the issue/concern conveyed by the customer, if warranted? | Yes/ No | 0-5 | |
| Did the agent close the conversation appropriately? | Yes/ No | 0-5 | |
| Did the agent use proper spelling, capitalization, grammar and punctuation? | Yes/ No | 0-5 | |

### Product knowledge: The necessary understanding to quickly and effectively resolve common customer issues

| Criteria | Assessment | | Supporting evidence |
| --- | --- | --- | --- |
| | Y/N | Scale | |
| Did the agent display a desire to help the customer get their issue resolved? | Yes/ No | 0-5 | |
| Was the agent able to properly diagnose the customer's issue? | Yes/ No | 0-5 | |
| Did the agent offer multiple options to resolve the customer's issue? | Yes/ No | 0-5 | |
| Did the agent offer the ideal/best practice option to resolve the customer's issue? | Yes/ No | 0-5 | |
| Did the agent address all the customer's questions in a timely manner? | Yes/ No | 0-5 | |
| Did the agent avoid overloading the customer with unnecessary or unrelated information? | Yes/ No | 0-5 | |
| Did the agent come across as knowledgeable, confident, and humble? | Yes/ No | 0-5 | |

# The Loris Scorecard Template

## Policy adherence: Alignment with company rules and regulations

| Criteria | Assessment | | Supporting evidence |
| --- | --- | --- | --- |
| | Y/N | Scale | |
| Did the agent convey the mini-Miranda, if needed? | Yes/ No | 0-5 | |
| Did the agent avoid using absolutes that cannot be guaranteed? | Yes/ No | 0-5 | |
| Did the agent refrain from blaming the customer or any third party? | Yes/ No | 0-5 | |
| Did the agent avoid asking duplicate questions that the customer already answered? | Yes/ No | 0-5 | |
| Did the agent avoid expressing frustration with or talking down to the customer? | Yes/ No | 0-5 | |
| Did the agent avoid using inappropriate slang, and offensive or inappropriate language? | Yes/ No | 0-5 | |
| Did the agent set the right expectation of a delay in response to the customer, if needed? | Yes/ No | 0-5 | |
| Did the agent give the customer sufficient time to respond? | Yes/ No | 0-5 | |

## After-call work: Completion of necessary steps following the conversation

| Criteria | Assessment | | Supporting evidence |
| --- | --- | --- | --- |
| | Y/N | Scale | |
| Did the agent complete the action necessary to resolve the customer's issue, if needed? | Yes/ No | 0-5 | |
| Did the agent complete the necessary conversation writeup for the customer's account? | Yes/ No | 0-5 | |
| Did the agent communicate the issue to the department who owns the resolution (e.g. Marketing, Product, etc), if needed? | Yes/ No | 0-5 | |

# MAKE A FREE COPY
## of the Loris Scorecard Template here

**CLICK HERE**

# Loris

Learn more at loris.ai