



**Award of Excellence**

**Mentoring Guide**

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**“We are what we repeatedly do.  
Excellence, then, is not an act, but a habit.”  
Aristotle**

## Mentoring:

ATSI has resources available should you require assistance or advice with the program. Members with many years of experience in the program can assist you by assessing the clients that you submit, by listening to your recordings and providing constructive criticism on how to achieve the Award of Excellence (AOE).

We can team you with a mentor who will help you with the process of filling out the client profile sheets, how to keep track of the changes to the client accounts and how to build and keep morale high during the program.

In a recent ATSI survey, members were asked the following questions:

What does the AOE mean to you?

“As an Administrator and the person who currently supervises our ‘In-House’ call monitoring program, it was a great learning tool for me to see how ATSI judges their calls and the type of things they look for. It has allowed me to make some changes to our current monitoring program so that it can be more effective and more efficient. Also, getting a “3<sup>rd</sup> Party’s” opinion has given me a better idea of what separates a good call center from a *Great* call center and what I need to do to help my staff get to that level. “

*Lorie Pulaski, Antietam Call Center*

What does the AOE mean to your business?

“Earning this award is a wonderful RETENTION tool. We make sure our current customers know that we earned the AOE, since our competitors don’t take part or don’t earn it, our customers know that they are with a superior service.

It is a wonderful SALES tool. Our sales consultants are able to tout the proof of our quality.

It is a wonderful PR tool. Our community knows that we earn the award and that elevates our business (and industry) in the minds of everyone from our banker to our landlord to potential employees.”

*Donna West, Focus Telecommunications, Inc.*

## **INTRODUCTION:**

This booklet has been prepared to assist participants with understanding all aspects of the Award of Excellence program including: benefits of participation, information required in the forms, the scoring process, and the role of your staff in the program.

The messaging and call center industry has matured in communications technology and sophisticated consumers. Companies know they are in a niche market for the consumer who requires live operator services. With competition from virtually every angle, only the best service will keep that consumer happy and loyal. While most organizations in the industry certainly provide good service, we are searching for that which goes beyond. The cut above will be rewarded with our coveted *Award of Excellence*. Here is how we determine that level.

## **OUR DESCRIPTION OF EXCELLENT SERVICE:**

Excellence requires a level of service that considers the caller first in every aspect of the call. Excellence makes a caller believe they are the most important person (or their problem is the most important consideration) to your call agent / CSR. How the agent handles every call, from beginning to end determines the success of your client relationship and the level of repeat business. No matter what is happening at your office on any given day, the caller should never believe your agent is too busy to give them the best service.

## **BENEFITS OF PARTICIPATION:**

If successful in achieving an 80% overall average score, participants will enjoy:

- A plaque for the office wall to remind both customers and staff of their accomplishment
- A press release to send to the appropriate media and use in sales kits and staff / customer newsletters
- A photo op at the presentation ceremony to accompany the press release
- Team accomplishment and pride
- The ability to improve further by using the evaluation sheets and recording of the calls to find areas still in need of attention

This program was designed as a tool of measurement of your customer service levels. The success of the program however has not been based on “winning’ the Award. If unsuccessful in achieving an 80% overall average score:

- It is a chance to regroup and find areas to improve
- Each participant receives evaluation reports and a CD recording of the calls which are the best tools to establish areas in need of attention
- Management & staff rally together to determine to win it next time

## PROGRAM PAST, PRESENT AND FUTURE:

The program was started in Canada in 1989 and has been slightly modified every year since to remain relevant to our changing industry. ATSI started to use the program in 1995 with great success. Thousands of calls have been made to many participating companies yielding many winners.

Since the program is geared toward individual accomplishment on an ongoing basis, the following categories were developed to show continuity of consistently high-quality service:

Year One	Award of Excellence
Year Two	Bronze Award of Excellence
Year Three	Silver Award of Excellence
Year Four	Silver Plus Award of Excellence
Year Five	Gold Award of Excellence
Year Six	Pearl Award of Excellence
Year Seven	Emerald Award of Excellence
Year Eight	Ruby Award of Excellence
Year Nine	Sapphire Award of Excellence
Year Ten	Diamond Award of Excellence
Year Ten +	Diamond Award of Excellence with year Distinction
Year Fifteen	Platinum Award of Excellence
Year Fifteen +	Platinum Plus Award of Excellence with year Distinction
Year Twenty	Onyx Award of Excellence
Year Twenty +	Onyx Plus Award of Excellence with year Distinction
Year Twenty five	Titanium Award of Excellence

It is important to note that the first five years must be earned consecutively to achieve gold status as this shows the ability to maintain the consistent level of service. *In the event a company does not pass within the first 5 years, such company will start again at year 1 until 5 consecutive years are earned in order to move on to the next level.* If, however, the company is unsuccessful once between every 5-year period, they can simply try for the next level the following year rather than start again at year one. Specifically, the company is allowed one miss or pass between years 6-10, 11-15, 16-20, 21-25, 26-30, 31-35, 36-40 *continuing this pattern for the life of the program.* If the company misses twice in any of the 5-year periods, they will go back to the first year in that period. Specifically, if a company is unsuccessful twice between year 6-10, they will go back to 6, if a company is unsuccessful twice between year 11-15, they will go back to 11 *continuing this pattern for the life of the program.* As part of the terms of this proviso, the company must participate each year and remain a member in good standing of the organization during each year.

Code numbers are assigned to each participant in random order and all references to participating company names are removed. The calls are recorded onto a CD for each company participating. The Client Profile Sheets and recordings of the calls are sent to two independent judges for scoring and evaluation. The scores are added and averaged for a final score. All who surpass 80% overall will receive the Award of Excellence plaque at the annual awards ceremony.

## YOUR ROLE IN PROVIDING INFORMATION:

Participants receive a link to a specially designed ATSI site with **12 Identification codes**. You will assign a code to each of your entries. The information you provide is **VERY IMPORTANT** in your success in the program. The better the information that is provided, the better the chances of having good test calls and better results. A tip sheet for completing the CPS is updated annually to assist you in compiling complete data. Both are available at the end of this booklet for your reference.

Our mystery callers complete a training program on an annual basis and are experienced personnel. Prior to each call made, the callers create scenarios based on the information provided in the CPS to be used in the 'test calls.' It is imperative that we have as much information as possible to sound credible and professional. Two sample detailed messages for each client submitted is **mandatory**.

Extra information is crucial to ensure our testers sound like a genuine caller. Because we can be calling from and to anywhere in North America, we need your help in making us sound local where required. Here are a few pieces of significant information to send along:

- Areas you service with current telephone exchanges for each (We have been caught giving a telephone exchange that does not match the address. A good call agent will know and the test will be a waste)
- Doctor's name, specialty, male or female
- Rural address with cross roads or directions (Often a vet or service company will require a rural address.)
- Any other information that you feel would be helpful in assisting the callers (i.e.: address of building with elevators, type of business, commercial, residential, sample call or name of actual customer, postal codes and zip codes)
- State the **time zone** of your client and cross reference with time you answer
- If you use **one number forwarding**, please contact the Association office for further guidelines

## OTHER TIPS AND REMINDERS:

- Keep on top of clients you submit. If your client has a change of information, you simply go back to the site using the link and code for that client, change the data and save the changes
- If your company does not operate 24 hours a day, please indicate hours
- Within the 12 submissions the test callers must be able to cover all shifts, 24 hours a day, seven days a week if applicable

Please **do not submit** the following types of clients:

- Clients that are automatically patched
- Clients who require a credit card with automatic approval
- Clients that do not want you to take messages i.e.: want the agent to refer another number or office hours only

## **CALLER PROCEDURES:**

Each of our mystery callers complete the Award of Excellence training program before they begin their test calls. The Awards Committee works in conjunction with the callers, who have first hand information regarding adjustments that are made to the program from time to time. The callers should:

- Test each shift at each company participating
- Call the DID # to avoid reaching the client's office
- Avoid offering too much information to allow the call agent to ask for it
- Identify themselves at the end of a call so that information is not given to the customer. It is important that your staff is aware of the program and know they must cancel all relating information.
- If asked by the call agent "How did I do?" the test caller should tell the agent that a judge will complete the evaluation.
- If the call agent hangs up before the caller has identified himself or herself, they will immediately call back to intercept the message.

### **Official Mystery Caller "STATEMENT TO CUSTOMERS" who may be reached while conducting test calls:**

"Please excuse this interruption. Your Message Service has entered their company in a program to evaluate their level of service. We are currently conducting test calls and I apologize for any inconvenience. Have a good day."

### **Official Mystery Caller "STATEMENT TO CALL AGENTS" who are not aware of the program:**

"Your Message Service is involved with a service evaluation program. Please delete this message and do not pass it on to the client. Please alert your Supervisor that you have had an ATSI test call."

## AWARD OF EXCELLENCE PROGRAM GUIDELINES & TIP SHEET

Welcome to the ATSI Award of Excellence program. Experienced committee members administer this program, and individuals hired and trained specifically for mystery call testing in the telemessaging industry conduct the calls. In order to maintain absolute confidentiality, no ATSI member or Director will have access to the identity of participating members. The following information will serve as tips and instructions for completing the Client Profile information to ensure each member has the best opportunity possible for success.

**This information is very important for callers to adequately prepare prior to the call.** The mystery callers develop a scenario that represents a realistic situation to be handled on your client's line. Time and marks are at risk if they do not understand the nature of a client's business or some key additional data is missing. **Please ensure that qualified personnel complete the Client Profile Sheets.**

1. Choosing the Client
  - Choose clients that have specific hours of answering or a direct line to the service
  - Choose clients that require more than, "Can I speak to Joe / Have Joe call me."
  - Provide as much information as possible
  - Do not choose a client that requires immediate patching
  - Do not choose a client that refers information only i.e. office hours, another number
2. DID Numbers
  - Provide the direct number the client uses to forward the line to your service
3. Hours WE answer **within the client's time zones**
  - Give us the hours that your service answers for each client so that we are making test calls in regular hours of answering for your staff
  - Provide clients that will test all of your shifts
4. Type of Business
  - Include all pertinent information
  - Specialty and sex of Doctor
  - Veterinarian for domestic pets Vs farm animals
  - Residential / industrial / commercial
  - Services grocery stores / hospitals / apartment buildings
5. Areas Serviced – Please provide sample address and corresponding telephone exchanges
  - Within city / town limits / rural
  - National / international
  - Regions
  - Province / State wide

## 6. Answer Phrase

- Complete answer phrase requested by client
- No marks will be deducted if the call agent says “Good morning” at the end instead of at the beginning of the call
- Attitude and clarity are graded here

## 7. Message Requirements

- Use discretion in this section
- Tick only those necessary i.e. always take complete message
- Personnel completing the CPS should have a strong knowledge of the client’s requirements from the company in regard to specific information contained in each message taken

## 8. Closing Statements

- If you use a professional closing statement, please include the text or script with your cps submission
- If your agents are training to repeat all information at the end of the call, please indicate this with your cps submission

## 9. Other

- Include any and all additional information unique to this client i.e. only gets paged on weekdays. This section can be used to give the callers the inside information to make a truly ideal test call

## 10. What can caller ask about

- This information will help the mystery caller to create the ‘scenario’
- Examples may include: rental rates, service rates, no heat emergency, dog sick, child sick, directions when required (to farm, to broken down car)

## **ADDITIONAL INFORMATION:**

- Score Sheet Included in this Booklet – The score sheet has a sliding scale with less than adequate scores of 0.
- Your staff members are not penalized for hold, but are marked on how well they handle it. If the caller is put on hold during the call, the score is counted out of 95 points. If there is no hold time, the score is marked out of 80 and then averaged. If the call is placed on hold more than once, the total point score is increased by 15 points per hold.
- Inform your staff. Informed staff will avoid wasted time with the mystery caller explaining the program, will avoid staff passing a test message on to a client, and will give your staff incentive and a reason to try to improve.
- Keep it positive.
- Check with staff throughout the program to confirm they do not experience undue anxiety.
- **The program runs over a six-month period and can be used as a tool for staff inspiration**

## **ETHICS & INTEGRITY OF THE PROGRAM:**

- Do not tell or show your staff which clients are involved in the program.
- Do not mark the client accounts in any way
- Do not assign calls to specific staff members – these calls should be open to all agents who answer for similar customers on your service.
- The purpose of this program is to show you how well your staff is performing
- When you mark accounts or direct calls only to your best staff members you are cheating and also showing your agents that you do not believe they are good enough to do well on their own – which will perpetuate this notion.

## How the Judges Score

### Section A - Ring Count

Note: Ring count is scored N/A when Auto Answer or Custom Greeting is used

0-3 rings = 5 points   4 rings = 4 points   5 rings = 3 points   6+ rings = 0 points

### Section B - Hold Time

#### B1 - Hold after Auto Answer / Custom Greeting

**B1a** - How long before the CSR answers the call?

<15 seconds = 2, 15-30 seconds = 1, 30-60 seconds = .5, 60+ seconds = 0

**B1b** – CSR return from auto answer / custom greeting as per CPS

2 points - Complete with genuine interest, positive attitude and preferred tone intended for this account as per cps form

0 points - Not complete / poor

#### B2 - Calls placed on hold by the CSR

NOTE: If call is not placed on hold, the total point score is reduced. If the call is placed on hold more than once, the total point score is increased.

**B2a** - Were you asked politely / Did CSR wait for your answer?

2 points - CSR asks caller to hold and waits for an answer

1 point - CSR asks caller to hold and does not wait for an answer

0 points - CSR does not ask caller to hold (ie: One moment...)

#### **B2b** - Hold Time

<15 seconds = 2, 15-30 seconds = 1, 30-60 seconds = .5, 60+ seconds / 0

#### **B2c** - Polite return from hold

2 points - CSR returned to the call politely, recognizing the hold

0 points - CSR does not thank the caller or recognize the hold (ie: starts with "your name...")

### Section C - Answer Phrase - Live Answer

**C1** - Did CSR use complete / proper answer phrase as per CPS? (The answer phrase must contain all required words from CPS but may be modified in order of phrasing.)

5 points - Complete with genuine interest, positive attitude and preferred tone intended for this account as per cps form

0 points - Not complete / poor

## **Section D - Service**

### **D1 - Call Control**

5 points - CSR guides the caller throughout the call with appropriate questions.

3 points - CSR maintains control throughout most of the call with minimal dead air or evidence that caller is leading the conversation.

0 points – Caller leads the call, rambles on / dead air is heard

### **D2 - Attitude**

5 points - CSR conveys a pleasant and helpful attitude by his/her choice of words and/or tone of voice throughout the call

3 points – CSR sounded interested and was helpful and composed BUT became flustered, seemed nervous or unsure, or lost control of the call during some portion of the call

0 points - CSR did not convey a pleasant helpful attitude

### **D3 - Manners**

5 points - CSR used please and/or thank you during the call

0 points - CSR did not use please and/or thank you during the call

### **D4 – Grammar**

NOTE: example of slang: Yup, Yep, Nope, ya/yeah (instead of yes), Gonna/Gunna, Lemme, Okey Dokey, Ya (instead of you), All Righty, Uhhhh, Cool, Ain't, like (when used as a filler), bye-bye now, bu-buy, speak'in,

The CSR habitually used a particular word (more than 3 times) during the call. Habitually means that a particular word is overused to the point of distraction during the call. Examples of unacceptable words when used habitually include, but not limited to: Okay, Um, Alright, no problem, no worries, K, thanks, mmmmmm, crutch words such as: so, well.

5 points – CSR used proper business phrasing throughout the call, without slang or habitual use of a particular word

0 points – CSR used any slang term OR CSR habitually used a particular word

### **D5 – Knowledgeable / Confident**

5 points - CSR appears knowledgeable of the account, giving appropriate responses and navigating account information with confidence / call flows smoothly

3 points - CSR has some knowledge, but is not consistent

0 points - CSR does not sound confident / stumbles through account information

**D6 - Voice Quality** - This section tests the voice quality of the CSR. It does not test the system quality or telephone line quality.

5 points - CSR enunciates clearly, does not mumble and speaks at an appropriate pace.

3 points - CSR does not speak clearly OR speaks too quickly or too slowly.

0 points - CSR enunciates poorly, mumbles and speaks either too quickly or too slowly

**D7 - Tone of Voice**

Tone of voice is to be evaluated based on the information provided by the Call Centre on the CPS for each client. Examples are: clinical...showing little or no emotion, friendly & interested. (New section added to cps form)

5 - Agent showed appropriate mood and genuine interest

0 - Agent did not show appropriate mood or genuine interest

**Section E - Message**

**E1 - Offer to take a message / offer to assist**

5 points - CSR advises caller how the message will be handled in a clear and professional manner any time during the call

(Examples: "I'll have the office return your call in the morning" or "I'll page the on call right away and have your call returned.")

3 points – CSR takes a message but gives only a vague reference as to how the message will be handled

(Example: "I'll have someone return the call")

0 points - CSR did not advise caller how the message would be handled any time during the call or allows the caller to hang up without taking a message

**E2 – Spelling of Caller's name**

5 points - CSR confirms spelling of surname

0 points - CSR does not confirm spelling of surname

**E3 – Confirmation of telephone number as per CPS (7 or 10 digits)**

5 points - CSR repeats full number

0 points - CSR does not repeat full number

**E4 – Completion of 'message requirements' as per CPS?**

5 points - CSR completed all of the CPS requirements

3 points - CSR missed one of the CPS requirements

0 points - CSR missed more than one of the CPS requirements

## **Section F - Close**

NOTE: The CSR should reassure the caller by advising what will be done with the message. The judge will score this section according to the closing statement that YOU have provided in the cps form.

5 points - The CSR completed the closing according to the cps form.

0 points - The CSR did not complete the closing statement according to the cps form.

## **Overall Customer Service Experience**

The following section is designed to give feedback in the soft skills that are an integral part of Quality Customer Service. This section will now be counted in the final score.

- 1) Did the CSR sound engaged with the caller? (Did the CSR engage in appropriate manner as indicated on CPS form per Centre Protocols?)

5 points – consistently engaged with the caller throughout the call

3 points – engaged with caller through part of the call

0 points – sounded mechanical or scripted

- 2) Did the CSR personalize by referring to the caller by name throughout the call  
Referring to the caller by name can be: first name, last name with Mr./ Mrs. / Ms, Doctor, Sir, Ma'am

5 points – referred to the caller by name once

0 points – did not refer to the caller by name

- 3) How would you rate the overall 'impression' the CSR left with the caller? (*Did the CSR remain professional and interested at all times, leaving the caller to feel confident that their needs would be met?*)

5 points – 100% confident needs would be met, CSR sounded professional, in control, and interested in the caller

4 points – Reasonably confident, CSR sounded professional for the most part, maintained control much of the time, and showed reasonable interest

3 points – Fairly confident, CSR sounded somewhat professional, maintained control some of the time, and demonstrated some amount of interest

0 points – Not confident, CSR sounded unsure of themselves, or lost professional edge, or did not appear to care