



Call Center Customer Service Survey Checklist

Greeting & Introduction

Evaluates the professionalism and clarity of the initial interaction.

Was the agent prompt and ready to assist?

- Yes
- No
- Neutral

Did the agent greet you politely?

- Yes
- No
- Neutral

Agent's Name (if known):

Write something...

Did the agent clearly identify themselves?

- Yes
- No
- Neutral

Please describe your initial impressions of the call.

Write something...

Issue Resolution

Assesses the effectiveness and efficiency of problem-solving efforts.

Resolution Time (Minutes)

Enter a number...

Resolution Method

- Phone Call
- Email
- Chat
- Self-Service Portal

Describe the Solution Provided

Write something...

Was the Issue Fully Resolved?

- Yes
- No
- Partially

If not fully resolved, explain why.

Write something...

Number of Escalations Required

Enter a number...

Agent Knowledge & Accuracy

Measures the agent's understanding of products/services and provision of correct information.

Did the agent correctly identify the product/service the customer was inquiring about?

- Yes
- No
- Not Applicable

On a scale of 1-5 (1 being inaccurate, 5 being completely accurate), how would you rate the agent's knowledge?

Enter a number...

Did the agent provide accurate information regarding pricing?

- Yes
- No
- Not Applicable

Please describe any inaccuracies or misleading information provided by the agent.

Write something...

Did the agent reference relevant policies or procedures correctly?

- Yes
- No
- Not Applicable

Communication Skills

Focuses on clarity, empathy, and active listening during the call.

Did the agent listen attentively to your concerns?

- Yes, fully
- Somewhat
- Not really
- No, not at all

How clear was the agent's language?

- Very Clear
- Mostly Clear
- Somewhat Clear
- Not Clear at All

Did the agent demonstrate empathy?

- Yes, very much
- Somewhat
- Not really
- No, not at all

Please describe any specific examples of excellent or ineffective communication.

Write something...

Rate the agent's tone of voice (1-10, 10 being most positive).

Enter a number...

Did the agent avoid using jargon or technical terms you didn't understand?

- Yes
- Mostly
- Sometimes
- No

Call Handling Time

Tracks the overall duration of the call and identifies potential areas for optimization.

Total Call Duration (minutes)

Enter a number...

Hold Time (minutes)

Enter a number...

After Call Work (ACW) Time (minutes)

Enter a number...

Timestamp of Call Start

Timestamp of Call End

Average Speed of Answer (ASA) - seconds

Enter a number...

Call Closure & Confirmation

Evaluates the completeness and clarity of the call's conclusion and next steps.

Was the resolution confirmed with the customer?

- Yes
- No
- Not Applicable

Was a summary of the resolution provided to the customer?

- Yes
- No
- Not Applicable

Reference/Case Number (if applicable):

Write something...

Did the customer express any remaining concerns?

- Yes
- No

If yes, please describe remaining concerns:

Write something...

Estimated Time for Next Action (minutes):

Enter a number...

Overall Satisfaction

Gauges the customer's overall experience and likelihood to recommend.

Rate your overall satisfaction (1-10, 10 being highly satisfied)

Enter a number...

How likely are you to recommend our services?

- Very Likely
- Likely
- Neutral
- Unlikely
- Very Unlikely

Was the agent polite and courteous?

- Yes
- No
- Somewhat

Please provide any additional comments or suggestions.

Write something...

How would you rate the speed of resolution (1-5, 1 being very slow, 5 being very fast)

Enter a number...

Post-Call Follow-Up (if applicable)

Assess the effectiveness of any subsequent communication after the initial call.

Was a follow-up action required?

- Yes
- No

Date of follow-up (if applicable)

Enter date...

Time of follow-up (if applicable)

Method of follow-up?

- Email
- Phone
- SMS
- Other

Details of follow-up communication:

Write something...

Did the follow-up resolve the customer's issue?

- Yes
- No
- Partially

Customer Satisfaction Score (1-5) after follow-up:

Enter a number...