

How May I Help You?

Call Log/Evaluation

Company Name: **Fidelity Investments**

Number: **800-544-6666**

Category: **Brokerage**

Final score: **86.6** Rank: **4** (tie)

What to Say: The CBC caller will ask the operator what is the minimum amount of money needed to open a trading account. This is an informational request only, and the caller does not need to have an account with the brokerage house.

CALL LOG			
CALL 1			
WEEKDAY			
Time	Action		
49 secs	Automated system answered. Asked for my SIN number, I didn't enter it. System asked again or said I could press zero for customer service.		
57 secs	Put in queue Talked to person, she told me about how opening an account.		

CALL 2 WEEK NIGHT			
Time	Action		
	<p>Answered by system.</p> <p>Asks for SIN or customer ID.</p> <p>I don't enter either – it asks again and gives me the option of pressing zero for representative.</p>		
35 secs	press zero		
52 secs	in queue		
57 secs	Person answers – he does account maintenance, not set-ups, transfers me.		
1:36	Queue		
2:18	Answered by advisor who gives me info about opening a new account.		

CALL 3 WEEKEND			
Time	Action		
	Machine answers		
8 secs	<p>Asks me to enter SIN# or customer ID. I don't.</p> <p>Asks again, or for representative, press 0.</p>		
49 secs	In queue		
55 secs	Person answers.		
1:37	Transferred to someone who handles opening new accounts.		
2:07	Answered by person who helps me.		

PART 1 – AUTOMATED SYSTEM

1/ Exiting Automated System

Note: if a human answers the phone directly, please score 65 and move to Part 2 (question 8). If placed in the queue for an operator directly, score 20.

CALL 1						
0	5	10	15	20	65	Total 15
Unable to Navigate Out of AS	Placed in queue after more than 2 mins navigating menus	Placed in queue after 1-2 mins navigating menus	Placed in queue after 30 secs to 1 min navigating menus	Placed in queue immediately/ or in 30 seconds or less	Human answers call immediately (go to part 2)	
CALL 2						
0	5	10	15	20	65	Total 15
Unable to Navigate Out of AS	Placed in queue after more than 2 mins navigating menus	Placed in queue after 1-2 mins navigating menus	Placed in queue after 30 secs to 1 min navigating menus	Placed in queue immediately/ or in 30 seconds or less	Human answers call immediately (go to part 2)	
CALL 3						
0	5	10	15	20	65	Total 15
Unable to Navigate Out of AS	Placed in queue after more than 2 mins navigating menus	Placed in queue after 1-2 mins navigating menus	Placed in queue after 30 secs to 1 min navigating menus	Placed in queue after 30 secs or less navigating menus	Human answers call immediately (go to part 2)	
Average						15 /20

2/ Ease of Navigating Prompts

Note: If transferred to queue immediately, score 10.

CALL 1						
0	2	5	7	10	Total 10	
Unable to Move through system	Prompts too long, filled with legalese	Prompts long, filled with CS clichés	Moderate length prompts	Short, user-friendly prompts		
CALL 2						
0	2	5	7	10	Total 10	
Unable to Move through system	Prompts too long, filled with legalese	Prompts long, filled with CS clichés	Moderate length prompts	Short, user-friendly prompts		
CALL 3						
0	2	5	7	10	Total 10	
Unable to Move through system	Prompts too long, filled with legalese	Prompts long, filled with CS clichés	Moderate length prompts	Short, user-friendly prompts		
Average						10/10

3/ Time of wait provided				
CALL 1				
0	1	5	10	Total 10
No time of Wait ever Provided	Time of wait provided, but inaccurate	Time of wait provided once but never updated	Time of wait provided and updated regularly/ no time spent in queue	
CALL 2				
0	1	5	10	Total 10
No time of Wait ever Provided	Time of wait provided, but inaccurate	Time of wait provided once but never updated	Time of wait provided and updated regularly/ no time spent in queue	
CALL 3				
0	1	5	10	Total 10
No time of Wait ever Provided	Time of wait provided, but inaccurate	Time of wait provided once but never updated	Time of wait provided and updated regularly no time spent in queue	
Average				10 /10

4/ Time in Queue to reach the Proper Person								
CALL 1								
0	2	4	6	8	9	10	Actual length 8 secs	Total 10
More than 6 minutes	5 - 6 minutes	4 - 5 minutes	3 - 4 minutes	2 - 3 minutes	1 - 2 minutes	Less than 1 minute		
CALL 2								
0	2	4	6	8	9	10	Actual length 1 st -5 secs 2 nd -42 secs	Total 10
More than 6 minutes	5 - 6 minutes	4 - 5 minutes	3 - 4 minutes	2 - 3 minutes	1 - 2 minutes	Less than 1 minute		
CALL 3								
0	2	4	6	8	9	10	Actual length 42 secs	Total 10
More than 6 minutes	5 - 6 minutes	4 - 5 minutes	3 - 4 minutes	2 - 3 minutes	1 - 2 minutes	Less than 1 minute		
Average								10 /10

5/ Interrupting System			
(from fourth call – only checking this parameter/ Also: If transferred to queue immediately, score 10.)			
Date of Call	Time of Call	Called by:	
0	5		Total
Caller has no way to Interrupt voice prompts By keypad or with voice command		Voice menu prompts can be interrupted by keypad or voice command	5 /5

6/ Language options			
Date of Call	Time of Call	Called by:	
0	4	5	Total
One language only, No ability to switch	English or French option at start of call	English, French or OTHER language at start of call	0 /5

7/ Automated System Tone			
Date of Call	Time of Call	Called by:	
0	3	5	Total
Automated system tries to Unprofessional, annoying	Automated system tries to sound human,	Automates system sounds professional, not preachy	5 /5

END OF PART 1

PART 2 – DEALING WITH PEOPLE

8/ Number of Transfers					
CALL 1					
0	2	3	5	10	Total 10
Transferred More than 3 times	Transferred 3 times	Transferred 2 times	Transferred 1 time	First operator deals with issue	
CALL 2					
0	2	3	5	10	Total 5
Transferred More than 3 times	Transferred 3 times	Transferred 2 times	Transferred 1 time	First operator deals with issue	
CALL 3					
0	2	3	5	10	Total 5
Transferred More than 3 times	Transferred 3 times	Transferred 2 times	Transferred 1 time	First operator deals with issue	
Average					6.6/10

9/ Understanding/Comprehension					
CALL 1					
0	0	3	5	10	Total 10
Cannot understand Operator	Operator doesn't comprehend issue	Operator diction hinders call	Operator slow to understand issue	Operator diction comprehension clear	
CALL 2					
0	0	3	5	10	Total 10
Cannot understand Operator	Operator doesn't comprehend issue	Operator diction hinders call	Operator slow to understand Issue	Operator diction comprehension clear	
CALL 3					
0	0	3	5	10	Total 10
Cannot understand Operator	Operator doesn't comprehend issue	Operator diction hinders call	Operator takes time to understand Issue	Operator diction comprehension clear	
Average					10 /10

10/ Operator Demeanor							
Note: rate operator who deals with main issue							
CALL 1							
0	2	4	5	6	8	10	Total 10
Rude			Indifferent			Professional, serious	
CALL 2							
0	2	4	5	6	8	10	Total 10
Rude			Indifferent			Professional, serious	
CALL 3							
0	2	4	5	6	8	10	Total 10
Rude			Indifferent			Professional, serious	
Average							10 /10

11/ Repetition		
(if not asked for any information by system, score 5)		
Date of Call	Time of Call	Called by:
0	5	Total
Caller asked to repeat Information (name, account Number, issue, etc) entered Into system	When caller reaches person, not asked to repeat any information	5 /5

12/ No Hang Ups	
CALL 1 2 3 (circle)	
DEDUCT 10	Total
System does not understand Caller commands, keypad commands So hangs up	/-10

END OF PART 2

PART 3 - BONUS

13/ Muzak/Ads – BONUS		
ALL CALLS		
0	+ 5	Total
Annoying muzak and/or Ads played while on hold, Unable to disable	Caller allowed to disable muzak/ads	/+5 BONUS

14/ No one available Options – BONUS		
ALL CALLS		
0	+ 5	Total
No option Given, Good-bye	Customer can leave a voice mail, told will be called back	/+ 5 BONUS

END OF PART 3 - BONUS