

# How May I Help You? Call Log/Evaluation

Company Name: **RBC Visa**

Number: **800-769-2512**

Category: **Credit**

Final score: **84.2** Rank: **7**

**What to say:** The CBC caller will be shopping around for interest rates for a balance transfer. They should ask how this will work, and enquire whether balance transfer cheques are available. The caller will be wanting to transfer \$5000 from a HBC department store credit card to their credit card account. Will work best if calling with an account.

<b>CALL LOG</b>			
<b>CALL 1</b>			
<b>WEEK DAY</b>			
Time	Action		
Answers after 1 ring	Language option		
20 secs	1 <sup>st</sup> menu		
48 secs	Press 0 to talk to a person		
53 secs	2 <sup>nd</sup> menu		
1:26	Press 5 to talk to a person		
1:35	enter card number		
2:00	enter home number		
2:05	3 <sup>rd</sup> menu		
2:30	Press 6 to talk to a person		
2:43	Into queue		
3:09	Person		

<b>CALL 2 WEEK NIGHT</b>	Date	Time	Caller
Time	Action		
0:00	Call answered – automated system		
0:09	Menu presented		
	Press 5 for rep		
0:46	Enter Visa # (asks again when I don't)		
1:27	Placed in call queue		
1:35	Operator answers and gives advice on looking into line of credit (pleasant and helpful)		
2:00	Call ends		

<b>CALL 3 Weekend</b>			
Time	Action		
0s	Welcome Press 1 for English and 2 for French		
15s	5 Menu Options listed		
47s	Enter your card number, if you make a mistake press *. I do not enter anything since I do not have a RBC Card.		
1m 05s	System did not receive a response		
1m 12s	Enter your card number. I do not enter anything since I do not have a RBC Card.		
1m 24s	Have your credit card number ready while you are transferred		
1m 37s	Ringing		
1m 40s	Answers		
1m 52s	We have introductory offers which are usually 1.9% but you must receive an offer in the mail to be eligible.		
2m 19s	If you sign up, it would be the regular interest rate for the card, which is usually 18.5% or 19.5%		
2m 53s	Lower interest rate of 11.5% is available for \$20 per year.		
3m 13s	You can apply through the credit department Balance Transfers can be done over the phone or with Balance Transfer Cheques.		
3m 50s	I thank the operator and say I'll have to call back.		
3m 52s	Call Ends		

# PART 1 – AUTOMATED SYSTEM

<b>1/ Exiting Automated System</b>						
Note: if a human answers the phone directly, please score 65 and move to Part 2 (question 8)						
<b>CALL 1</b>						
0	5	10	15	20	65	Total 5
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)	
<b>CALL 2</b>						
0	5	10	15	20	65	Total 10
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)	
<b>CALL 3</b>						
0	5	10	15	<b>20</b>	65	Total 20
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						11.6/20

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

<b>3/ Time of wait provided</b>				
<b>CALL 1</b>				
0	1	5	10	Total 0
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 or no time spent in queue	
<b>CALL 2</b>				
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 or no time spent in queue	
<b>CALL 3</b>				
0	1	5	<u>10</u>	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 or no time spent in queue	
Average				6.6/10

<b>4/ Time in Queue to reach the Proper Person</b>								
<b>CALL 1</b>								
0	2	4	6	8	9	10	Actual length 26 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		
<b>CALL 2</b>								
0	2	4	6	8	9	10	Actual length	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		
<b>CALL 3</b>								
0	2	4	6	8	9	10	Actual Length 16s	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

<b>5/ Interrupting System</b>			
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

<b>6/ Language options</b>			
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	4/5

<b>7/ Automated System Tone</b>			
Date of Call	Time of Call	Called by:	
0	5		Total
Automated system tries to sound human, patronizing		Automates system sounds professional, not preachy	5 /5

**END OF PART 1**

# PART 2 – DEALING WITH PEOPLE

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

9/ Understanding/Comprehension					
<b>CALL 1</b>					
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	
<b>CALL 2</b>					
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	
<b>CALL 3</b>					
0	0	3	5	<b>10</b>	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

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

<b>11/ Repetition</b>		
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

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

**END OF PART 2**

# PART 3 - BONUS

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

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

**END OF PART 3 - BONUS**