

How May I Help You?

Call Log/Evaluation

Company Name: **CIBC Visa**

Number: **1 800 465 4653**

Category: **Credit**

Final Score: **67 %** Rank: **20**

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.

CALL LOG	
CALL 1	
WEEK NIGHT	
Time	Action
0:10	Language option – English or French
0:32	Option #1
0:55	Option #2
1:27	Ended up in the wrong section – I thought choosing “info about cards” would be the right choice, but turns out I should have picked “existing card” instead – this is confusing
2:02	Have to key in your number for a specific type of card, which I don't have, or press # if you don't have this type of card. I typed #, which it said was an incorrect option. I was then put in a queue.
2:15	Put in queue - obnoxious ads, bad music and CSR clichés
9:10	Human answers - tells me the balance transfer rate is 19.5%. I ask if they offer special rates for this, and she says that it's 3.9% when there's a special promotion. I ask when they have the special promotions, and she says that it's just occasionally, she doesn't know when.
10:50	Put on hold so she can find out about the special promotions
13:00	Give her my card number to find out if I'm eligible for the special promotion. Also give name, date of birth and security number for security reasons.
14:35	Put on hold for her to “check a couple of things.”
18:29	Find out that I am eligible for a promotion. She reads a bunch of legalese about how the promotion works, that she doesn't seem to understand. She then gives a bit of an explanation in plain English. I get answers about how to do a transfer.

20:45	End of call
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CALL 2			
WEEK DAY			
Time	Action		
0:07	Language option		
0:19	Option #1 – choose “existing card”		
0:38	Enter Visa number		
0:46	Enter Date of Birth for security		
1:03	Option #2 – choose operator		
1:20	Put in queue - annoying ads and music		
2:07	Human answers - have to give information for security, but not a repeat of info already inputted - A bit of an accent and strange lilting tone of voice that makes him sound bored, but comprehensible - Much more knowledgeable than the woman from call #1 – get the 3.9% rate right away, clearly explains how a balance transfer would work, without legalese		
4:09	End of Call		

CALL 3			
WEEK END			
Time	Action		
0:08	Language selection – French or English		
0:17	Option #1 – choose existing account		
0:40	Enter card number		
1:02	Enter date of birth for security check		
1:19	Option #2 – choose 0 for “all other requests”		
1:40	Queue		
2:14	Human answers - Have to give DOB, name, security number for security check - Am told that there’s a promotion where I can get 3.9% for a limited time only if I got promotional cheques in the mail, or if I qualify over the phone		
4:21	Put on hold so she can check whether I qualify		
4:45	She informs me that I do indeed qualify and am approved for the special rate - Just need to give them my HBC account number to have it transferred over - Gives me a promotional code so that when I call back I don’t have to go through a check again to see if I qualify		

5:58	- She is friendly and knowledgeable, explains the process thoroughly End of call
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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)						
CALL 1						
0	<u>5</u>	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)	
CALL 2						
0	5	<u>10</u>	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)	
CALL 3						
0	5	<u>10</u>	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)	
Average						8.3 /20

2/ Ease of Navigating Prompts						
CALL 1						
0	2	<u>5</u>	7	10	Total 5	
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	<u>7</u>	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		
CALL 3						
0	2	5	<u>7</u>	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						6.3 /10

3/ Time of wait provided				
CALL 1				
<u>0</u>	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/ no time spent in queue	
CALL 2				
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 time spent in queue	
CALL 3				
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 time spent in queue	
Average				6.7 /10

4/ Time in Queue to reach the Proper Person								
CALL 1								
<u>0</u>	2	4	6	8	9	10	Actual Length	Total
More than 6 minutes	5 - 6 minutes	4 - 5 minutes	3 - 4 minutes	2 - 3 minutes	1 - 2 minutes	Less than 1 minute	6 min 55 sec	0
CALL 2								
0	2	4	6	8	9	<u>10</u>	Actual Length	Total
More than 6 minutes	5 - 6 minutes	4 - 5 minutes	3 - 4 minutes	2 - 3 minutes	1 - 2 minutes	Less than 1 minute	37 sec	10
CALL 3								
0	2	4	6	8	9	<u>10</u>	Actual Length	Total
More than 6 minutes	5 - 6 minutes	4 - 5 minutes	3 - 4 minutes	2 - 3 minutes	1 - 2 minutes	Less than 1 minute	34 sec	10
Average								6.7 /10

5/ Interrupting System			
Date of Call	Time of Call	Called by:	
0	<u>5</u>		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	<u>4</u>	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

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

END OF PART 1

PART 2 – DEALING WITH PEOPLE

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

9/ Understanding/Comprehension					
CALL 1					
0	0	3	<u>5</u>	10	Total
Cannot understand Operator	Operator doesn't comprehend issue	Operator diction hinders call	Operator slow to understand issue	Operator diction comprehension clear	5
CALL 2					
0	0	3	5	<u>10</u>	Total
Cannot understand Operator	Operator doesn't comprehend issue	Operator diction hinders call	Operator slow to understand Issue	Operator diction comprehension clear	10
CALL 3					
0	0	3	5	<u>10</u>	Total
Cannot understand Operator	Operator doesn't comprehend issue	Operator diction hinders call	Operator takes time to understand Issue	Operator diction comprehension clear	10
Average					8.3
					/10

10/ Operator Demeanor								
Note: rate operator who deals with main issue								
CALL 1								
0	2	4	5	6	<u>8</u>	10	Total	
Rude			Indifferent			Professional, serious	8	
CALL 2								
0	2	4	5	6	<u>8</u>	10	Total	
Rude			Indifferent			Professional, serious	8	
CALL 3								
0	2	4	5	6	8	<u>10</u>	Total	
Rude			Indifferent			Professional, serious	10	
							Average	8.7 /10

11/ Repetition		
Date of Call	Time of Call	Called by:
0	5	Total
<u>Caller asked to repeat</u> Information (name, account Number, issue, etc) entered Into system	When caller reaches person, not asked to repeat any information	0 /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
<u><i>Annoying muzak and/or</i></u> Ads played while on hold, Unable to disable	Caller allowed to disable muzak/ads	0 /+5 BONUS

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

END OF PART 3 - BONUS