

How May I Help You? Call Log/Evaluation

Company Name: **Sun Life**

Number: **800-786-5433**

Category: **Insurance**

Final Score: **51.3 %** Rank: **32**

What to Say: Request information about a personal plan

CALL LOG	
CALL 1 WEEK NIGHT	
Time	Action
0s	Welcome
6s	Press 1 for English, and 2 for French
12s	Call may be monitored for quality assurance purposes
52s	Menu options start
1m 20s	Second Menu
1m 42s	I made no response since no options were appropriate and my call was automatically transferred
1m 55s	Operator answers
2m 22s	Operator says they do have individual plans but that I'd need to speak to a basic advisor
2m 50s	I ask if they are referring me to a financial advisor.
3m 15s	She says it is actually a Clarica advisor. I can either have them have someone contact me, which will take about 3 days, or they can give me a number to call to reach someone.
3m 30s	Clarification about whether I want someone to call me or if I will call them.
3m 59s	I need to call 604-683-6905 to speak to an Advisor to find out about plan options.
4m 17s	End of call.

CALL 2 WEEK END			
Time	Action		
0s	Welcome		
5s	Press 1 for English and 2 for French		
14s	Call may be monitored for quality assurance purposes		
28s	Tax season is upon us, for mailing dates press 7		
45s	Options... member through an advisor press 1...		
1m 15s	Please have your contract and/or certificate ready.... Options		
1m 44s	No response since none was appropriate		
1m 55s	Office is now closed. Hours are Monday to Friday from 8am to 8pm ET.		
2m 12s	System says goodbye and ends call		

CALL 3 WEEK DAY			
Time	Action		
0s	Welcome to Sun Life		
6s	Press 1 for English and 2 for French		
12s	Please note your call may be monitored for quality assurance purposes		
17s	Press * to repeat menu		
25s	Press # for the previous menu Tax season is upon us, Press 7 for mailing dates of forms		
40s	Member of Benefit or group retirement plan through the employer		
46s	Options		
1m 25s	Press 9 for assistance		
1m 27s	Transferring		
1m 35s	Ringing		
1m 38s	I ask about personal plans		
1m 49s	The operator says they need to pass my information to a Clarica representative		
2m 18s	Or the operator can give me a phone number for a Clarica Representative in my area		
2m 38s	I tell her which area and she gives me an address and phone number for a Clarica centre in my area		
3m 05s	Thanks		
3m 10s	End Call		

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	5	<u>10</u>	15	20	65	Total
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)	10
CALL 2						
<u>0</u>	5	10	15	20	65	Total
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)	0
CALL 3						
0	5	<u>10</u>	15	20	65	Total
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)	10
Average						6.6 /20

2/ Ease of Navigating Prompts						
CALL 1						
0	2	<u>5</u>	7	10	Total	
Unable to Move through system	Prompts too long, filled with legalese	Prompts long, filled with CS clichés	Moderate length prompts	Short, user-friendly prompts	5	
CALL 2						
<u>0</u>	2	5	7	10	Total	
Unable to Move through system	Prompts too long, filled with legalese	Prompts long, filled with CS clichés	Moderate length prompts	Short, user-friendly prompts	0	
CALL 3						
0	2	<u>5</u>	7	10	Total	
Unable to Move through system	Prompts too long, filled with legalese	Prompts long, filled with CS clichés	Moderate length prompts	Short, user-friendly prompts	5	
Average						3.3 /10

3/ Time of wait provided				
CALL 1				
0	1	5	<u>10</u>	Total
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	10
CALL 2				
<u>0</u>	1	5	10	Total
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	0
CALL 3				
0	1	5	<u>10</u>	Total
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	10
Average				6.6 /10

4/ Time in Queue to reach the Proper Person								
CALL 1								
0	2	4	6	8	<u>9</u>	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	1m 55s	9
CALL 2								
<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	N/a	0
CALL 3								
0	2	4	6	8	<u>9</u>	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	1m 38s	9
Average								6 /10

5/ Interrupting System			
Date of Call Mar. 1/07	Time of Call 7:00pm ET	Called by: Tennille	
0		5	Total 5 /5
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	

6/ Language options			
Date of Call Mar. 1/07	Time of Call 7:00pm ET	Called by: Tennille	
0	4	5	Total 4 /5
One language only, No ability to switch	English or French option at start of call	English, French or OTHER language at start of call	

7/ Automated System Tone			
Date of Call Mar. 1/07	Time of Call 7:00pm ET	Called by: Tennille	
0	3	5	Total 5 /5
Automated system tries to Sound human, unprofessional	Automated system tries to sound human, is annoying	Automates system sounds professional, not preachy	

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					
<u>0</u>	2	3	5	10	Total
Transferred More than 3 times	Transferred 3 times	Transferred 2 times	Transferred 1 time	First operator deals with issue	0
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					6.6 /10

9/ Understanding/Comprehension					
CALL 1					
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 2					
<u>0</u>	0	3	5	10	Total
Cannot understand Operator	Operator doesn't comprehend issue	Operator diction hinders call	Operator slow to understand Issue	Operator diction comprehension clear	0
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					6.6 /10

10/ Operator Demeanor								
Note: rate operator who deals with main issue								
CALL 1								
0	2	4	5	6	8	<u>10</u>	Total	
Rude			Indifferent			Professional, serious	10	
CALL 2								
<u>0</u>	2	4	5	6	8	10	Total	
Rude			Indifferent			Professional, serious	0	
CALL 3								
0	2	4	5	6	8	<u>10</u>	Total	
Rude			Indifferent			Professional, serious	10	
							Average	6.6 /10

11/ Repetition		
Date of Call Mar. 1/07	Time of Call 7:00pm	Called by: Tennille
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 /-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	0 /+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	0 /+ 5 BONUS

END OF PART 3 - BONUS

FINAL TOTAL			
1	2	3	4
6.6 /20	3.3 /10	6.6 /10	6 /10
5	6	7	8
5 /5	4 /5	5 /5	6.6 /10
9	10	11	12
6.6 /10	6.6 /10	5 /5	deduct 10
13	14		TOTAL
bonus 0	bonus 0		51.3