

# How May I Help You?

## Call Log/Evaluation

Company Name: **President's Choice Financial Mastercard**

Number: **888-872-4724**

Category: **Credit**

Final Score: **22.8 %** Rank: **36**

What to Say: Balance Transfer Inquiry

<b>CALL LOG</b>	
<b>CALL 1</b>	
<b>WEEK DAY</b>	
Time	Action
0s	Welcome
8s	Enter Card # -- Since I did not have a card, I waited to see if other options were offered.
18s	Enter card #, or if you do not have one, press the # key
35s	Options menu
52s	New options menu
1m 16s	PC Financial Mastercard is provided by... Bank
1m 30s	Call transferred
1m 37s	Thank you for calling...
1m 42s	Press 1 for English and 2 for French
1m 56s	New Options menu
2m 19s	Menu repeats, selection made, call transferred to another automated system
2m 58s	Enter Mastercard number, or press * for more options if you do not have your Mastercard number
3m 03s	Press 1 to enter your card number or press 2 for additional services
3m 20s	Additional options listed but none were appropriate so I wait to see if the system gives me an appropriate option
3m 52s	Options repeat but there is still no appropriate option
4m 10s	Press 0 even though this has not been listed as an option
4m 21s	Call transferred
4m 30s	Call Answered
4m 45s	She explains Balance transfer terms For the first 30 days, there is an introductory balance transfer rate of 1.97% for 6 months

	<p>You also get 15000 PC Points (which is a value of about a \$15 gift certificate) If you do a balance Transfer for \$1000 or more you will get 5000 more President's Choice points.</p>
5m 38s	Asks about the rate after 6 months
5m 45s	Operator asks me to hold so she can find out
6m 47s	The interest rate is 19.97% but if you have the ability to pay it off after your introductory rate you would then get an interest rate of 4.97% available if new balances were transferred over.
7m 37s	End call

<b>CALL 2 WEEK END</b>				
Time	Action			
0s	Welcome			
9s	Enter your card number			
16s	Enter your card number, if you don't have one, press #			
30s	Options menu			
1m 14s	New options menu			
1m 46s	Options menu			
2m 09s	For President's Choice Mastercard sales service, press 1			
2m 36s	President's Choice Mastercard is provided by PC Financial			
2m 53s	Ringing			
2m 58s	Thank you for calling PC Financial Mastercard. Press 1 for English and 2 for French			
3m 13s	Options menu (I make no response because none are appropriate)			
3m 39s	Options menu (I select the one I find closest to what I am looking for)			
4m 01s	Press * if no you do not have a Mastercard number at this time. Invalid response, repeats. I press *			
4m 33s	Enter your number or press 2 for more services			
4m 58s	Options, no response			
5m 24s	Did you receive selection, re-lists options			
5m 50s	I press 0 because no options are appropriate Ringing Operator Answers			
6m 05s	Balance Transfers questions Operator asks for my card number and I explain I do not have a card.			
6m 43s	There is a promotional rate of 1.69% for then first 6 months then it goes to the regular rate of 19.97% Balance Transfer cheques are sent out for promotions.			
7m 27s	She tells me they tell you all you need to know on the application. I ask if she can tell me the information now.			
7m 58s	If approved the amount you filled in will automatically go on as a Balance Transfer.			
8m 20s	Thanks			
8m 29s	End Call			

<b>CALL 3 WEEK NIGHT</b>				
Time	Action			
0s	Welcome to PC Financial			

9s	Enter your card number
15s	Enter your card number
19s	If you do not have a President's Choice Card, press #
30s	Options
1m 08s	New options menu
1m 45s	Repeat options
2m 10s	For President's Choice Financial Mastercard, press 1
2m 19s	President's Choice Financial Mastercard is provided by President's Choice Bank
2m 30s	Call transferred
2m 34s	Ringling
2m 39s	Thank you for calling President's Choice Financial Mastercard Press 1 for English and 2 for French
2m 53s	Options
3m 18s	Repeat options, press 1
3m 42s	Enter card number, press * if you do not have your card number at this time
4m 04s	Enter your card number now or press 2 for more information
4m 19s	Press 7 for the previous menu or 9 to end your call
4m 30s	Menu options
4m 53s	Repeats menu, no response because none of the options are appropriate
5m 33s	Call is ended by system

# 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	<u>5</u>	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)	5
<b>CALL 2</b>						
0	<u>5</u>	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)	5
<b>CALL 3</b>						
<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
Average						3.3 /20

<b>2/ Ease of Navigating Prompts</b>						
<b>CALL 1</b>						
0	<u>2</u>	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	2	
<b>CALL 2</b>						
0	<u>2</u>	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	2	
<b>CALL 3</b>						
<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	
Average						1.3 /10

<b>3/ Time of wait provided</b>				
<b>CALL 1</b>				
<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
<b>CALL 2</b>				
<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
<b>CALL 3</b>				
<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
Average				0 /10

<b>4/ Time in Queue to reach the Proper Person</b>								
<b>CALL 1</b>								
0	2	<u>4</u>	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	4m 30s	4
<b>CALL 2</b>								
0	<u>2</u>	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	About 5m55s	2
<b>CALL 3</b>								
<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	0	0
Average								2 /10

<b>5/ Interrupting System</b>			
Date of Call Mar. 1/07	Time of Call 1:11pm ET	Called by: Tennille	
0	5	Total	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	/5

<b>6/ Language options</b>			
Date of Call Mar. 7/07	Time of Call 1:11pm ET	Called by: Tennille	
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

<b>7/ Automated System Tone</b>			
Date of Call Mar. /	Time of Call 1:11pm ET	Called by: Tennille	
0	3	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					
<b>CALL 1</b>					
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
<b>CALL 2</b>					
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
<b>CALL 3</b>					
<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
Average					6.6 /10

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

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

<b>11/ Repetition</b>		
Date of Call Mar. 1/07	Time of Call 1:11pm ET	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	0 /5

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