

Caller Experience Checklist

For Evaluating Your Caller Experience

Use this checklist to evaluate your own Caller Experience. Take notes, and try to identify ways to improve...from the *caller's* perspective.

1. Live Answer

a. Greeting - Is your greeting carefully crafted to be able to be delivered in a natural way?

b. Tone - Is the tone welcoming, or do callers feel like they've just interrupted something else?

c. Competency - Does your staff know how to transfer calls, find the right person, place people On-Hold, and generally navigate your phone system with confidence?

d. Transfer/Hold Etiquette - Do callers get asked if they'd like to be transferred or put On-Hold? Is there an opportunity for them to respond? Are they being well taken care of?

2. Auto-Attendant

a. Structure - Are the options ordered correctly? Are your most popular options first?

b. Clarity of Choices - Is it clear where people are going when they select an option?

c. Personality - Does the overall "personality" of your Auto-Attendant match the personality of your company?

d. Number of Options - Try to keep these to 4 or 5, and no more than 6.

3. On-Hold Message

a. Fresh - When was the last time you updated your message?

b. Relevant - Are you talking about things your customer cares about?

c. Music - Does this fit with the style of your company?

d. Voice - Does the voice fit the image of your company? Are there ways you could connect this voice to other parts of your marketing?

e. Content - Do you have enough content? Too much content?

f. Personality - Does the personality of your On-Hold message match your company personality? (Fun, serious, humorous, etc?)

g. Length - Is your On-Hold message long enough to not repeat often for callers? Does it contain enough information?

h. Sound Quality - Is the volume too high or too low? Is the message clear? Is there static?
