



Quality Assurance Checklist for Customer Service

Product Knowledge

- Understood all questions asked by the customer
- Provided accurate information about the product
- Identified the root cause of the issue
- Demonstrated knowledge of key features
- Up-to-date with the latest product changes

Tone and empathy

- Appropriate greeting
- Used the customer's name
- Personalized their communication
- Acknowledged the customer's problem
- Maintained a friendly attitude throughout the conversation
- Apologized for any inconveniences appropriately
- Thanked the customer at the end of the conversation

Internal Processes

- Went through the customer's history and checked prior notes
- Verified the customer's identity
- Tagged the conversation correctly
- Provided the customer with relevant self-service links
- Made effective use of macros
- Included sufficient notes
- Escalated the issue appropriately

Solution

- Answered all of the customer's questions in a concise manner
- Asked the customer how they wanted the issue to be solved
- Gave alternative ways to solve the issue

- Outlined the next steps clearly
- Provided a timeline for resolution
- Delivered timely updates to the customer
- Offered additional support that minimized the chances of a follow-up

Language and Grammar 🖋️

- Used correct grammar
- Used correct spelling
- Used correct punctuation
- Used consistent wording for product names and features
- Avoided using technical jargon
- Made appropriate use of emojis and GIFs