

# Recommended QA Competencies

## Issue resolution

### Product knowledge\*

Can confidently answer questions about your company's products and services the first time customers ask.

*Ask: Was the rep knowledgeable of the products?*

### Issue diagnosis\*

Can understand customers' underlying issues and identify the right solutions.

*Ask: Did the rep provide a solution to the right issue?*

### Proactive guidance

Can not only resolve customers' issues, but can actively guide them throughout the interaction.

*Ask: Did the rep navigate you through your service experience?*

### Internal channel navigation

Knows what resources are available and leverages that knowledge to quickly solve customer issues.

*Ask: Did the rep effectively provide you with a solution?*

### Call management\*

Can handle customer issues effectively while keeping business costs in mind.

*Ask: Did the rep efficiently use call time to assist you with your issue?*

### Issue resolution

Can provide complete and accurate solutions to the customers' questions so they don't have to call back.

*Ask: Did the rep fully resolve your issue today?*

### Next-issue avoidance

Can actively anticipate the next related issue so they can proactively resolve the issue for the customer.

*Ask: Did the rep offer to help you resolve an issue in addition to the one you called about?*

### Communication

Can speak clearly and logically so customers can understand how they are helping.

*Ask: Did the rep communicate clearly?*

### Perseverance

Can use insights to persuade customers to think differently and handle customer objections to convince them to make a purchase.

*Ask: Did the rep change your mind and convince you to make a purchase?*

### Value positioning

Can explain the benefits of using your company's products and services.

*Ask: Did the rep make you understand the benefits of using our products and services?*

### Need diagnosis

Can proactively ask customers questions to probe potential sales needs that are beyond customers' issues.

*Ask: Did the rep try to understand your potential needs for other products and services?*

### Acknowledgement

Can show customers that they know them, understand their situation, and understand the broader relationship customers have with the company.

*Ask: Did the rep demonstrate they understood you and your situation?*

### Context gathering

Can surface information about customers that is not necessarily related to the resolution of customers' current issues, but influences customers' expectation of service.

*Ask: Did the rep gather information unrelated to the current issue but still relevant to your situation?*

### Alternative positioning\*

Can utilize customer information to reposition available options and achieve mutually beneficial outcomes.

*Ask: Did the rep suggest a solution that you believed was most beneficial for you?*

### Advocacy\*

Can actively champion for the customers' issues and work on their behalf to achieve resolution.

*Ask: Did the rep act in your best interest?*

### Positive language\*

Can communicate information in a way that diffuses negative customer reactions.

*Ask: Did the rep tell you what can be done, rather than what can't be done?*

### Education

Can teach the customer something new that can be used in future interactions.

*Ask: Did the rep teach you something new that you can use for future reference?*

### Purposeful small talk

Can gather additional information that they can use to identify the right solutions.

*Ask: Did the rep ask you questions relevant to your issue at hand?*

### Negotiation

Can provide reasoned communications with customers to reach an agreed solution.

*Ask: Did the rep provide an explanation for his or her suggestion or solution?*



#### Introduction:

This set of recommended QA competencies includes the skills we believe are important for reps to exhibit.

They are broadly divided into sections:

- Issue resolution
- Personal skills
- Customer rapport
- Service to sales
- Internal procedures



#### How to read:

The top part is the *high-level competency* by which a rep is being evaluated. The ask is a *suggested survey question* to gather direct customer feedback on this competency.



#### Note:

In addition to these core competencies, you and your team should always be aware of internal procedures:

#### Legal compliance:

Abiding by all legal department policies during each interaction

#### Information accuracy:

Offering correct information to your customers so they don't have to contact you with the same issue a second time

#### Procedure compliance:

Offering customer interactions that are consistent with your company's quality assurance policies

These should be taken into consideration when *scoring internally* and should be *ever-present* in what your reps are doing.

### Resilience

Can bounce back from a difficult conversation and deliver consistently positive experiences for all customers.

*Ask: Did the rep sound calm and professional?*

### Active listening

Can make full use of the information customers voluntarily share during the conversation so they can accurately and promptly resolve the customers' issues.

*Ask: Did you have to repeat information to the rep or ask anything more than once?*

### Confidence

Believes that what they say is accurate and helpful.

*Ask: Did the rep demonstrate confidence during the interaction?*

Service to sales  
(if applicable to your business)

Personal skills

Customer rapport