



General Call Center Quality Assurance Form

13 Mar 2026 / Connie Beahan

Complete

Score	3 / 12 (25%)	Flagged items	10	Actions	1
Customer Name					
Jessie Nemi					
Date and Time of Call					
12 Mar 2026 00:00 PST					
Name of Call Representative					
Marlon Manalo					
Name of QA Specialist					
Connie Beahan					
Evaluation Date and Time					
13 Mar 2026 15:02 PST					

Flagged items & Actions		10 flagged, 1 action
Flagged items		10 flagged, 0 actions
Audit / Greeting		
Did the agent greet the customer according to the protocol?		No
Audit / Understanding the Customer's Need		
Did the agent use probing questions to understand the customer's need?		No
Audit / Solution Information		
Did the agent offer the most appropriate solution to meet the customer's needs?		No
Audit / Solution Information		
Did the agent answer customer questions correctly?		No
Audit / Solution Information		
Did the agent provide options to the customer (if applicable)?		No
Audit / Solution Information		
Did the agent provide other resources (if applicable)?		No
Audit / Customer Service		
Did the agent follow the correct procedures for transferring a call (if applicable)?		No
Audit / End call		
Did the agent offer further assistance at the end of the call?		No
Audit / End call		
Did the agent close the call in an appropriate manner?		No
Audit Findings Log / Table / Row 2		
Severity		Major
Other actions		1 action

Completion Page

Observations / Recommendations

Marlon would benefit from targeted training, given that he's been with us for only over a month.

To do | Priority: Low | Due: 20 Mar 2026 15:19 PST | Created by: SafetyCulture Staff

Schedule a refresher

Schedule a brief refresher for Marlon to address these gaps.

Audit	9 flagged, 3 / 12 (25%)
Greeting	1 flagged, 0 / 1 (0%)
Did the agent greet the customer according to the protocol?	No
Understanding the Customer's Need	1 flagged, 0 / 1 (0%)
Did the agent use probing questions to understand the customer's need?	No
Solution Information	4 flagged, 0 / 4 (0%)
Did the agent offer the most appropriate solution to meet the customer's needs?	No
Did the agent answer customer questions correctly?	No
Did the agent provide options to the customer (if applicable)?	No
Did the agent provide other resources (if applicable)?	No
Customer Service	1 flagged, 3 / 4 (75%)
Did the agent follow the correct procedures for transferring a call (if applicable)?	No
Did the agent use empathetic listening skills?	Yes
Did the agent display a professional manner throughout the call?	Yes
Did the agent complete the call within the optimum call time while ensuring a positive experience for customer?	Yes
End call	2 flagged, 0 / 2 (0%)
Did the agent offer further assistance at the end of the call?	No
Did the agent close the call in an appropriate manner?	No

	Related Section	Findings	Severity	Action Required
1	Greeting	Protocol not followed	Observation	Coaching
2	Solution Information	Incorrect information provided	Major	Correction
3	Customer Service	Process/transfer issue	Minor	Coaching
4	Understanding the Customer's Need	Other	Minor	Coaching
5	End Call	Other	Minor	Coaching

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Schedule a brief refresher for Marlon to address these gaps.

Full Name and Signature of QA Specialist

Connie Beahan

Connie Beahan
13 Mar 2026 15:06 PST

Full Name and Signature of Employee

Marlon Manalo

Marlon Manalo
13 Mar 2026 15:07 PST