#### How To - Complete Quality Assurance Call Reports and Schedule

**Step 1.** You will have to listen to at least **30 calls** of the team member that you are evaluating that are **3 minutes or longer in length**. Using the Call Meeting Template, take note on how the call was handled and what are the things you can suggest in making/handling the call better.

Call Meeting Template is uploaded in the DropBox.

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Dropbox > Quality Assurance - Call Reports > 1- Quality Assurance Call Report Forms

To listen to the call recording, login to the ring central website and go to the **detailed call logs**.

# Admin Portal > Reports > Call logs > Detailed



# **RingCentral**

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	Last 30 days	3	4	5	6	7	8	9
6132	Last 50 days	10	11	12	13	14	15	16
2094	Last 60 days	17	18	19	20	21	22	23
1943		24	25	26	27	28	29	30

You can filter the date of the calls that you want to listen to.

**Step 2.** To listen to the recordings, find the inbound or outbound calls that the team member you are evaluating received/made.

- Green Phone Icon Inbound calls
- Blue Phone Icon Outbound calls
- Red Phone Icon Missed Calls

For Inbound Calls, look for the 1 link under the Recording Tab.

(⊷	<u>(314) 495-5864</u>	<u>(314) 600-2075</u>	⊕ <u>LEA GRUE</u>	04/19/2022 2:07 PM	1	Phone Call Accepted	0:

Find the **Play Button** and listen to the call.

(÷	<u>(314) 495-5864</u>	<u>(314) 600-2075</u>			⊕ LEA GRUE	04/19/2022 2:07 PM		Phone Call	Accepted	0:03:52
	<u>(314) 495-5864</u>		10		⊕ <u>LEA GRUE</u>	04/19/2022 2:07 PM	-	Phone Call	Accepted	0:03:52
			10	(813) 553-6801	⊕ <u>Tina Lumanta</u>	04/19/2022 2:07 PM	-	FindMe	No Answer	0:00:41
			10	(813) 563-0745	⊕ <u>Joymaeh Bagcat</u>	04/19/2022 2:08 PM	-	FindMe	IP Phone Offline	0:00:00
			10	(813) 591-5251	⊕ <u>Mae Faeldin</u>	04/19/2022 2:08 PM	۲	FindMe	Call connected	0:02:48

**For Outbound Calls**, the play button is just beside the date and the time that the call was made.



It will look like the photo below if the call was playing.



**Step 3.** If the student did not register on the recording that you listened to, check if the team member sent a text message to the student. We should send a text message to everyone that we spoke to and did not register over the phone. This can help us maximize our potential sales.

On the Ring Central Phone App, login the account of the teammate that you are evaluating. Go to messages and look for the text that was sent to the student.

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\*\*You can use the search bar to look for a specific number.

**Step 4**. You will have a call meeting with the team member that you are evaluating through Skype. You **must record** the meeting so that if the team member can relisten to the feedback and discussions that you had.

You can find the record button at the lower left corner when the meeting has started.



### **\*\*\*IMPORTANT TOPICS TO DISCUSS!!\*\*\***

- 1. Acknowledge the strengths and the progress of the team member. This is very important in building good relationship with team members and acknowledging their hard work.
- 2. Site the areas of improvement and discuss which can help them handle their calls better.
- 3. As for their homework, you can ask them to listen to their calls at their own convenience and use your call report as a guide.
- 4. Review each call that you listened to. Discuss how they handled the call and share your thoughts/suggestions on how the call can be better.
- 5. Set schedule for next meeting.

For setting the schedule of next meeting, see the guidelines below:

	CALL MEETING SCHEDULING					
	New team members who just recently finished call training, they should receive a					
WEEKLY	call meeting weekly for the first 4-6 weeks until it is evident that they are					
	mastering calls.					
	If the team member showed consistent progress and already mastered handling					
EVERY TWO	calls. This is until they have proven they are consistently able to flawlessly					
WEEKS	educate the customer, have mastery over explaining courses and options,					
	memorized pricing, send text messages to all no-sale calls where applicable,					
	always offer to help the person register, etc.					
	Tenured team members who already have mastered all processes and call					
ONCE A MONTH	handling.					

**Step 5.** One the meeting is done, you have to save the recording and upload it to DropBox.

File Title should be:

Call notes – Date of Meeting, Name of Team Member, Call Notes Recording- Date of Meeting, Name of Team Member, Call Meeting Recording Example: 4-20-2022 Eunice Call Notes

4-20-22 Eunice Call Meeting Recording

You have to upload it in the Quality Assurance folder in Dropbox.

# Dropbox > Quality Assurance - Call Reports > Team Member Folder

ropbox / Quality Assurance- Call Reports <u>↑ Upload ×</u> + Create ×	5	≣ ~
Name ↑	Modified	Who can access
1 - Quality Assurance Call Report Forms	Å	Only you
Ciara Soliman	Å	Only you
Enzy Hizole	Å	Only you
Eunice Cellar	Å	Only you
Joymaeh Bagcat	ф —	Only you
Mae Faeldin	☆	Only you
Tina Lumanta	☆	Only you

Click the Upload button and choose the file that you want to upload. **YOU MUST UPLOAD BOTH CALL NOTES AND RECORDING.** 

Dropbox / Quality Assurance- Call Reports / Eunice Cellar	
<u>↑ Upload ~</u> + Create ~ ····	
This folder is empty	
Drag and drop files onto this window to upload.	

#### Make sure that the file has been uploaded before closing the tab.

Dropbox / Quality Assurance- Call Reports / Tina Lumanta						
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4-18-202	22 Tina Call Notes.docx	2	4/19/2022 5:55 pm	Only you		
✓ 4-19-202	22 Tina Call Notes.docx	☆	4/20/2022 5:32 am	Only you		

**Step 6.** Send an email to the team member and copy Max, Kimberly, and Jay. This email will serve as a recap of the meeting that you had with the Team Member.

#### **Email Template:**

Hello (Team Member's Name),

It's nice talking to you today! It has been a great amazing call training today.

(Write here an acknowledgement of the progress that she has made from the last call meeting that you had. You can also write here additional message that you want to add)

For your homework this week, relisten to your calls on the call notes and use the call notes as a guide.

If you ever want to access our meeting recordings to revisit things we discussed, you can go to your instructor file in Dropbox. I keep your meeting recordings there. Dropbox > Quality Assurance - Call Reports > (Name of Team Member) The videos are labeled by the date of the meeting.

We look forward to another meeting next week! Please let me know if you have any questions.

(Your Name)