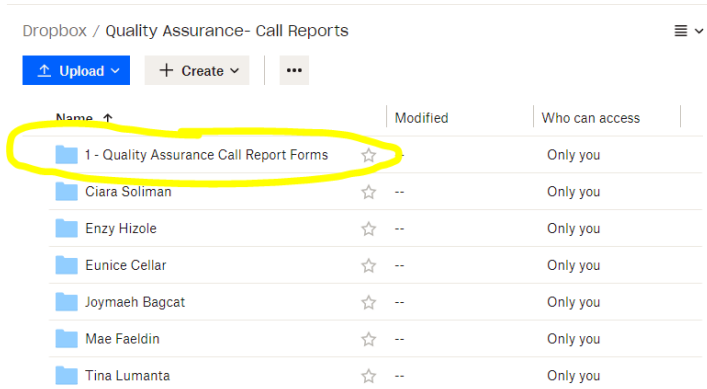
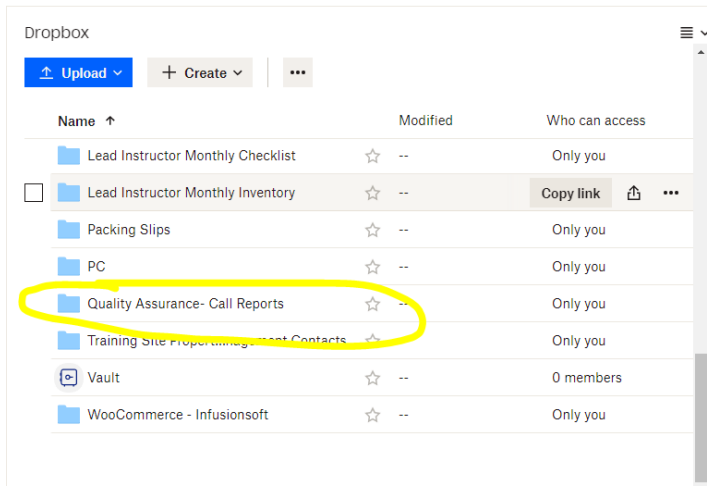


## How To - Complete Quality Assurance Call Reports and Schedule

**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.

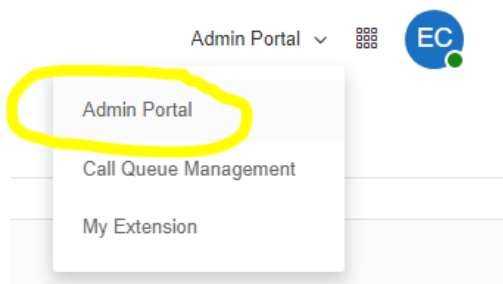
Call Meeting Template is uploaded in the DropBox.

### 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



Call Log



Analytics



Simple

Detailed

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

Last 7 days  

Today

Yesterday

Last 7 days

Last 30 days

Last 60 days

1-6132




1-2094

3-1943

← April 2022

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

**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.

	<a href="#">(314) 495-5864</a> <a href="#">(314) 600-2075</a>	 <a href="#">LEA GRUE</a>	04/19/2022 2:07 PM	<a href="#">1</a>	Phone Call	Accepted	0:03:52
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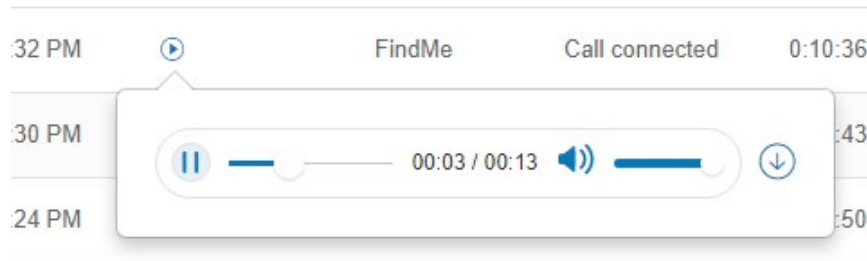
Find the **Play Button** and listen to the call.

	<a href="#">(314) 495-5864</a> <a href="#">(314) 600-2075</a>	 <a href="#">LEA GRUE</a>	04/19/2022 2:07 PM		Phone Call	Accepted	0:03:52
	<a href="#">(314) 495-5864</a>		10...	 <a href="#">LEA GRUE</a>	04/19/2022 2:07 PM	-	Phone Call Accepted 0:03:52
	10...	<a href="#">(813) 553-6801</a>		 <a href="#">Tina Lumanta</a>	04/19/2022 2:07 PM	-	FindMe No Answer 0:00:41
	10...	<a href="#">(813) 563-0745</a>		 <a href="#">Joymaeh Bagcat</a>	04/19/2022 2:08 PM	-	FindMe IP Phone Offline 0:00:00
	10...	<a href="#">(813) 591-5251</a>		 <a href="#">Mae Faeldin</a>	04/19/2022 2:08 PM		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.

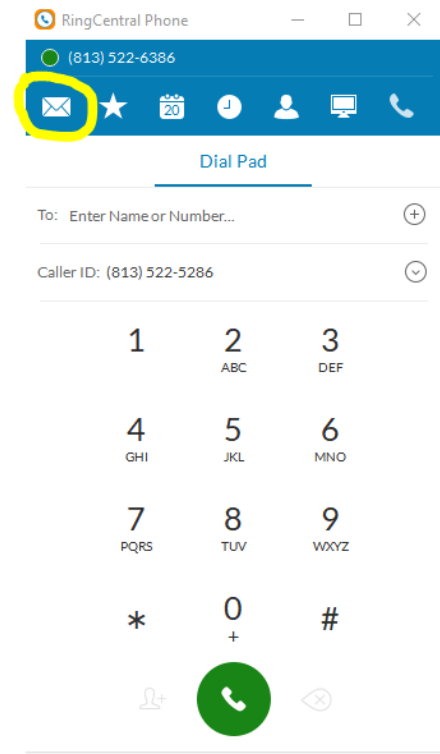
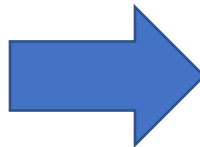
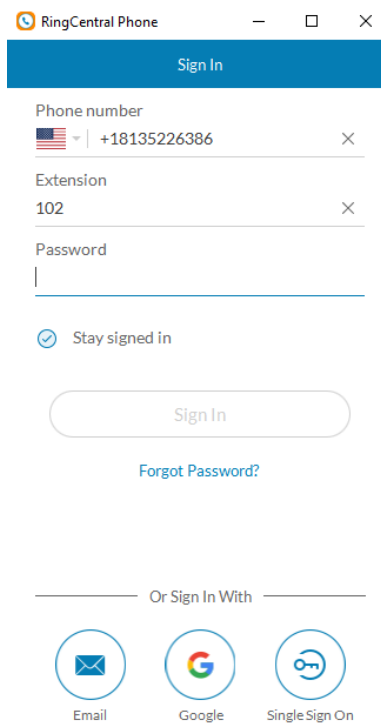
	<a href="#">(615) 397-9316</a> <a href="#">(615) 948-1943</a> 10...	 <a href="#">CARMEN JOH...</a>	04/19/2022 1:46 PM		VoIP Call	Call connected	0:07:44
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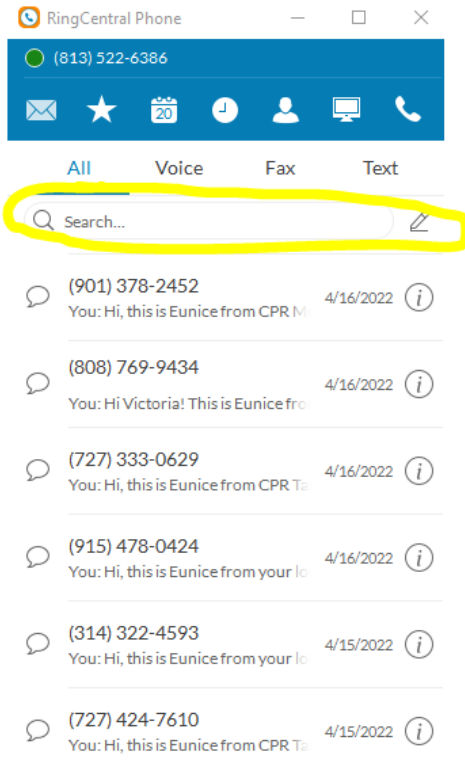
It will look like the photo below if the call was playing.



**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.





\*\*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	
<b>WEEKLY</b>	New team members who just recently finished call training, they should receive a call meeting weekly for the first 4-6 weeks until it is evident that they are mastering calls.
<b>EVERY TWO WEEKS</b>	If the team member showed consistent progress and already mastered handling calls. This is until they have proven they are consistently able to flawlessly 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.
<b>ONCE A MONTH</b>	Tenured team members who already have mastered all processes and call 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**

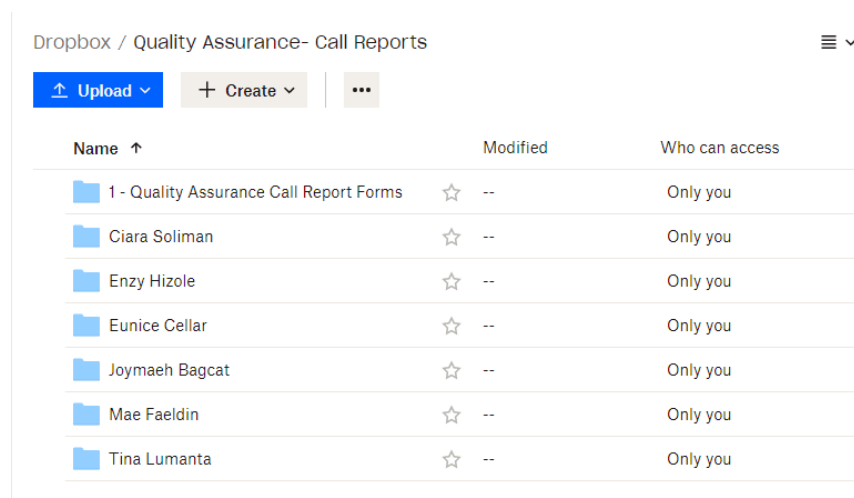
Recording- **Date of Meeting, Name of Team Member, Call Meeting Recording**

**Example: 4-20-2022 Eunice Call Notes**

**4-20-22 Eunice Call Meeting Recording**

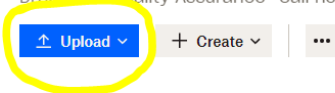
You have to upload it in the Quality Assurance folder in Dropbox.

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



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

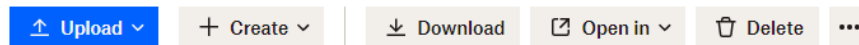
Dropbox / Quality Assurance- Call Reports / Eunice Cellar



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



Name ↑	Modified	Who can access
<input type="checkbox"/> 4-18-2022 Tina Call Notes.docx	☆ 4/19/2022 5:55 pm	Only you
<input checked="" type="checkbox"/> 4-19-2022 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)