



Omni Agent Quality Scorecard Templates

Best-practice scorecards for
human and AI agents

Introduction

AI and human agents are NOW working side by side in the contact center, and by 2027, they'll be inseparable. In fact, 98% of contact centers already use AI, and 85.6% have humans and AI working together to serve customers.

As automation becomes embedded in everyday interactions, quality management can NO longer focus on humans alone. To deliver consistent, trustworthy customer experiences, organizations need a quality strategy that applies equally to both human and AI agents - one that is fair, measurable, and aligned to real-world expectations.

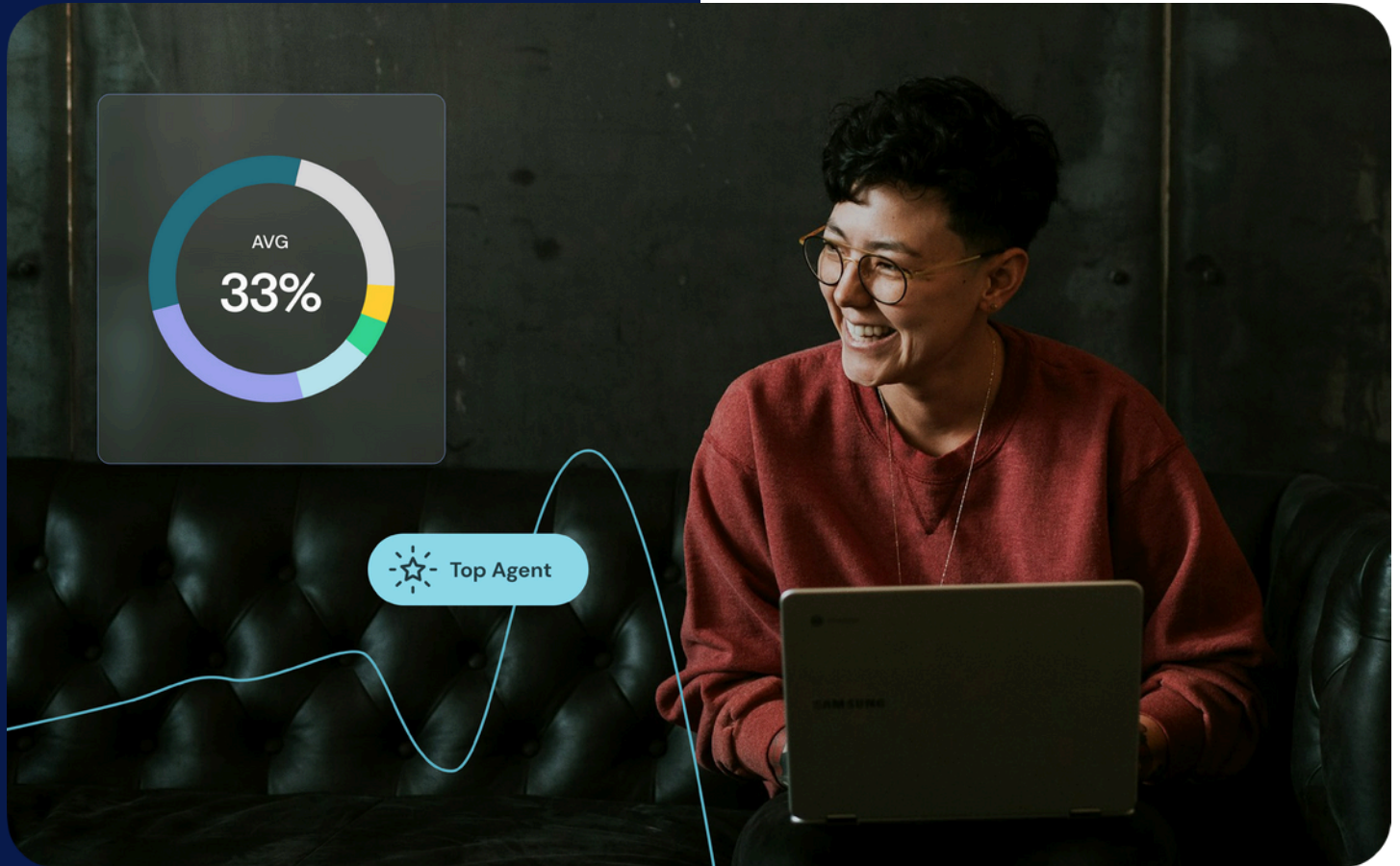
That's where these scorecard templates come in.

Our Human and AI Agent Scorecard Templates provide a standardized, industry-aligned framework for evaluating performance across every interaction - whether it's handled by a person, an AI agent, or a combination of both. Built on proven industry best practices, these templates ensure consistency in how quality is measured across accuracy, compliance, customer effort, experience, and resolution outcomes.

By applying the same quality lens to both human and AI agents, organizations can:

- Ensure AI behaves in ways that align with brand, policy, and customer expectations
- Create consistent coaching and improvement standards across all agent types
- Confidently scale automation without sacrificing experience or trust

Whether you're evaluating human agents, AI agents, or blended interactions, these scorecards help you measure what matters most and improve it across every channel and industry.



Human Agent Scorecard Templates

Best-practice human agent scorecards that turn everyday interactions into measurable performance improvements.

Financial

OPENING SCRIPT/GREETING

1.1 Appropriate greeting "Thank you for calling InNOvative Solutions Providing Unique Experiences in Financial Services"

Y 100%

NO (0)

1.2 Banker begins conversation with a open question

Y (100%)

NO (0)

REGULATORY QUESTIONS

Section Score 30.00

2.1 Banker verifies member via PIN or security questions

Y (100%)

NO (0)

2.2 Banker reads and gains approval of disclosures

Y (100%)

NO (0)

N/A

2.3 Banker did NOT communicate credit decision or imply the likelihood of qualification based on member supplied information

Y (100%)

NO (0)

N/A

2.4 Banker flags account for possible fraud activity and follows appropriate course of actions

Y (100%)

NO (0)

N/A

BANKER OWNERSHIP/CALL CONTROL Section Score 30.00

3.1 Banker personalized the call by using the member name

Y (100%)

NO (0)

3.2 Banker made affirmative statements of ownership - CAN DO language

Y (100%)

NO (0)

3.3 Banker provided complete and accurate information during the interaction

Y (100%)

NO (0)

3.4 Banker resolved the members issue efficiently and effectively

Y (100%)

NO (0)

Financial

3.5 Banker expresses gratitude throughout the call for the member relationship

Y (100%)

NO (0)

3.6 Banker appropriately addressed member concerns regarding self service portal (technical, navigation, how to)

Y (100%)

NO (0)

N/A

UPSELL/ ADD-ON

Section Score 10.00

4.1 Banker recommends additional InNOvative Solutions Financial Services products & services

Y (100%)

NO (0)

N/A

CLOSING SCRIPT/SUMMARY

Section Score 20.00

5.1 Banker summarizes the request, checks for additional needs, and sets appropriate expectations

Y (100%)

NO (0)

5.2 Banker sends an email confirmation of all transactions

Y (100%)

NO (0)

N/A

5.3 Banker thanks member for doing business with InNOvative Solutions Financial Services

Y (100%)

NO (0)

Logistics

GREETING/CLOSING

Section Score 100%

1.1 Appropriate greeting utilized

Y (100%)

NO (0%)

1.2 Agent made effort to capture the business (quote only)

Y (100%)

NO (0%)

N/A

1.3 Outbound calls only: anNOunce that the call may be monitored for quality assurance

Y (100%)

NO (0%)

N/A

1.4 Determined or asked if there were any additional questions or concerns or business to complete prior to ending the call

Y (100%)

NO (0%)

N/A

Logistics

TECHNICAL ACCURACY Section Score 0%

2.1 Caller information obtained, verified and entered accurately

Y (100%) NO (0%) **N/A**

2.2 Stop(s) location information obtained and verified and entered accurately

Y (100%) NO (0%) **N/A**

2.3 Any specific times provided by the caller is entered accurately

Y (100%) NO (0%) **N/A**

2.4 Freight information obtained and entered accurately

Y (100%) NO (0%) **N/A**

2.5 Truck size entered accurately (based on caller request or determined through information obtained)

Y (100%) NO (0%) **N/A**

2.6 Any additional requirements or special equipment needs obtained and entered accurately

Y (100%) NO (0%) **N/A**

2.7 Billing address and applicable authorization verified and entered accurately

Y (100%) NO (0%) **N/A**

2.8 Agent committed to shipment based on current capacity guidelines

Y (100%) NO (0%) **N/A**

DOCUMENTATION Section Score 0%

3.1 OTHER: ETA information (latest pick-up time on NON-committal loads)

Y (100%) NO (0%) **N/A**

3.2 OTHER : 24 hour contact name and number

Y (100%) NO (0%) **N/A**

3.3 DISPATCH: Any special instructions for pick up and or delivery

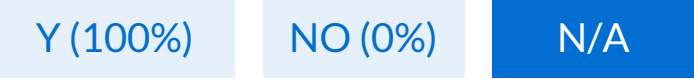
Y (100%) NO (0%) **N/A**

3.4 DISPATCH: Contact name and phone number for pick up and delivery

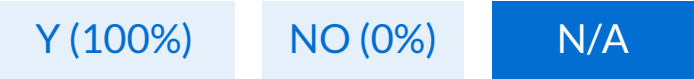
Y (100%) NO (0%) **N/A**

Logistics

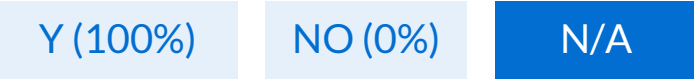
3.5 HOT COMMENT: Any information that the driver would need to see at time of load offer



3.6 HISTORY: Broker contact name and clearance confirmation



3.7 HISTORY: Any information NOT already captured in LME is entered in History Note



CUSTOMER EXPERIENCE: HERO Section Score 100%

4.1 Allowed caller to complete all statements or thoughts without interruption or talk over



4.2 Listened attentively



4.3 Communicated courteously throughout the interaction



4.4 Came across as interested; conversational; engaged; confident and positive



4.5 Avoided using NON business professional wording and or internal jargon



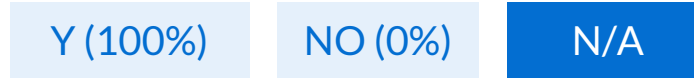
4.6 Utilized appropriate hold procedures



4.7 Prepared caller for potential silence



4.8 Utilized probing questions for clarification or better understanding when necessary 8.24%



4.9 Recognized the caller's demeanor and adjusted appropriately when needed(mirroring)



Logistics

4.10 Utilized the caller's name

Y (100%) NO (0%)

4.11 Provided an easy interaction or experience for the caller

Y (100%) NO (0%)

4.12 Provided information

Y (100%) NO (0%) **N/A**

Healthcare

OPENING SCRIPT/GREETING Section Score 100%

1.1 Call Readiness: Immediate attention given to the patient

Y (100%) NO (0)

1.2 Agent used proper greeting "Thank you for calling InNOvative Solutions Providing Unique Patient Experiences in Healthcare"

Y (100%) NO (0)

1.3 Identified Self

Y (100%) NO (0)

1.4 AckNOwledged the patient's request with a willingness statement using action phrases

Y (100%) NO (0)

COMPLIANCE REGULATORY Section Score 100%

2.1 Advised patient that the call may be recorded and/or monitored for security purposes

Y (100%) NO (0)

2.2 Demonstrated appropriate empathy for the patient's situation {if necessary}

Y (100%) NO (0) N/A

2.3 For all patients/providers, properly conducted HIPAA verification

Y (100%) NO (0) N/A

Healthcare

INFORMATION/VERIFICATION Section Score 100%

3.1 Used proper probing questions to verify State and Zip code

Y (100%)

NO (0)

N/A

3.2 When receiving new information, repeated new information back to the patient

Y (100%)

NO (0)

N/A

3.3 Information provided to patients was accurate

Y (100%)

NO (0)

N/A

3.4 Demonstrated appropriate job kNOwledge and/or used resources properly

Y (100%)

NO (0)

AGENT OWNERSHIP & CALL CONTROL Section Score 100%

4.1 Demonstrated an adapted, professional tone throughout the call

Y (100%)

NO (0)

4.2 Used courtesy words appropriately (please, thank you, etc.) throughout the call

Y (100%)

NO (0)

4.3 Controlled "dead air" with patient experiencing NO more than 10 seconds of silence at anytime during the call.

HIGHLY EFFECTIVE (100%)

MODERATELY EFFECTIVE (70%)

SLIGHTLY EFFECTIVE (40%)

NOT EFFECTIVE (10%)

MISSED OPPORTUNITY (0%)

4.4 Allowed the patient to speak without interruption

Y (100%)

NO (0)

4.5 Spoke clearly (used proper grammar and manners, NO slang)

Y (100%)

NO (0)

4.6 Used proper hold and transfer procedures

Y (100%)

NO (0)

N/A

Healthcare

4.7 If the situation warrants, appropriately apologized

Y (100%)

NO (0)

N/A

4.8 Used active listening skills

HIGHLY EFFECTIVE (100%)

MODERATELY EFFECTIVE (70%)

SLIGHTLY EFFECTIVE (40%)

NOT EFFECTIVE (10%)

MISSED OPPORTUNITY (0%)

REDUCING EFFORT

Section Score 100%

5.1 Offered alternative locations to patient

Y (100%)

NO (0)

N/A

5.2 Proactively provided address of testing center

Y (100%)

NO (0)

N/A

5.3 Proactively provided telephone number of testing center

Y (100%)

NO (0)

N/A

5.4 Proactively Informed patient of special instructions/restrictions

Y (100%)

NO (0)

N/A

5.5 Proactively offered to electronically send testing center information to patient

Y (100%)

NO (0)

N/A

5.6 Went "above and beyond"

HIGHLY EFFECTIVE (100%)

MODERATELY EFFECTIVE (70%)

SLIGHTLY EFFECTIVE (40%)

NOT EFFECTIVE (10%)

MISSED OPPORTUNITY (0%)

CLOSING SCRIPT/SUMMARY

Section Score 100%

6.1 Provided a summary of the call to include the appt date, time, location, doctor and department-specific instructions.

Y (100%)

NO (0)

N/A

6.2 Advised patient they will receive a reminder NOTification from InNOvative Solutions

Y (100%)

NO (0)

N/A

Healthcare

6.3 Asked how they could be of further assistance to the patient today. (includes transfer calls)

Y (100%)

NO (0)

6.4 Thanked the patient for calling InNOvative Solutions. (includes transfer calls)

Y (100%)

NO (0)

6.5 Offered patient educational materials

Y (100%)

NO (0)

N/A

Hospital

OPENING & GREETING

Section Score 100%

1.1 Open ended the call with warm greeting and provided name and position and company name

Y (100%)

NO (0)

1.2 Offered assistance (inbound) Advised reason for calling (outbound)

Y (100%)

NO (0)

HIPAA VERIFICATION/ V&A

Section Score 100%

2.1 Appropriately complied with HIPAA guidelines to include the callers and relationship to the member

Y (100%)

NO (0)

ACKNOWLEDGE AND REASSURE

Section Score 100%

3.1 AckNOwledgement of the caller's reason for the call

Y (100%)

NO (0)

3.2 Ownership was taken and offered reassurance the concern would be addressed and resolved

Y (100%)

NO (0)

LISTEN/PROBE

Section Score 100%

4.1 Appropriate questions asked to understand and resolve concerns and or requests.

Y (100%)

NO (0)

4.2 Used open ended questions to determine root cause of concern and or request

Y (100%)

NO (0)

Hospital

OFFER SOLUTIONS/ ALTERNATIVES;
ACHIEVE ISSUE RESOLUTION Section Score 100%

5.1 Provide accurate information based on Health Plan and regulatory guidance to answer questions and resolve concerns

Y (100%)

NO (0)

5.2 Provide alternative solutions when available to meet member lar preference

Y (100%)

NO (0)

5.3 Communicate next steps and target dates for follow-up if necessary for new requests Conduct expected follow-up action(s) when applicable for previous requests

Y (100%)

NO (0)

DOCUMENTATION Section Score 100%

6.1 Documents summary of call reason -actions taken- follow ups needed and specific departments and or individuals involved

Y (100%)

NO (0)

6.2 Documentation recorded in member- lar electronic medical record within department and or contractual requirement time frame

Y (100%)

NO (0)

CUSTOMER EXPERIENCE Section Score 100%

7.1 Communicated with professional language avoiding company and clinical jargon slang and acronyms

Y (100%)

NO (0)

7.2 Adjusted communication style to accommodate the member lar Tone of voice was friendly and positive Used member lar name during call Voice NOT raised in anger or frustration

Y (100%)

NO (0)

7.3 Avoided long periods of silence Ask for permission when placing on hold, advise reason for hold and approximate time frame of hold Thank the member lar for holding

Y (100%)

NO (0)

N/A

7.4 Took ownership NOT placing blame on other individuals departments and or systems Deescalated or escalated as appropriate

Y (100%)

NO (0)

CLOSING Section Score 100%

8.1 Closes call with final offer of assistance

Y (100%)

NO (0)

Government

OPENING SCRIPT/GREETING Section Score 25.00

1.1 Agent uses proper greeting "Thank you for calling InNOvative Solutions Providing Unique Citizen Experiences"

Y (100%)

NO (0)

1.2 Agent identified United States Citizenship and Immigration Services

Y (100%)

NO (0)

1.3 Agent advised the call may be monitored and recorded for quality purposes

Y (100%)

NO (0)

1.4 Agent provided the citizen with their full name (first and last)

Y (100%)

NO (0)

1.5 Agent asked the citizen how they may assist

Y (100%)

NO (0)

INFORMATION/VERIFICATION Section Score 35.00

2.1 Agent verified citizen account using last 4 digits of the SS#, address, email address, and/or dob

Y (20)

NO (0)

2.2 Agent collected citizen account number to validate online account if it was available

Y (15)

NO (0)

AGENT OWNERSHIP/CALL CONTROL Section Score 20.00

3.1 Agent took ownership of the call

Y (2)

NO (0)

3.2 Agent apologized for citizen inconvenience

Y (2)

NO (0)

N/A (2)

3.3 Agent asked for permission or informed the citizen prior to placing on hold

Y (3)

NO (0)

N/A (3)

Government

3.4 Agent reviewed process requirements based on the situation (FEMA claim, citizenship application, etc)

Y (2)

NO (0)

3.5 Agent used appropriate hold and transfer procedures including gathering information and thank for holding

Y (2)

NO (0)

N/A (2)

3.6 Agent confirmed they had addressed all of the citizen needs

Y (2)

NO (0)

3.7 Agent confirmed method of payment or described alternate methods

Y (2)

NO (0)

N/A (2)

3.8 Agent directed citizen to self-service tools such as websites or mobile app

Y (2)

NO (0)

3.9 Agent set appropriate expectations for documentation processing time

Y (3)

NO (0)

N/A (3)

CLOSING SCRIPT/SUMMARY

Section Score 20.00

4.1 Agent summarized the conversation for the citizen prior to ending the call

Y (4)

N (1)

4.2 Agent asks the citizen for the appropriate method of communication: email, phone, etc. for follow-up

Y (3)

NO (0)

4.3 Agent seeks commitment from citizen for outstanding documents or information

Y (3)

NO (0)

N/A (3)

4.4 Agent sets appropriate follow-up expectations

Y (4)

NO (0)

4.5 Agent asked if there are any additional questions or concerns, they can address before ending the call

Y (3)

NO (0)

4.6 Agent thanked citizen for contacting InNOvative Solutions and the USCIS

Y (3)

NO (0)

Help Desk

INCIDENT TICKET STANDARDS Section Score 100%

1.1 Correct the customer selected for each incident ticket created

Y (100%) **NO (0)**

1.2 Description standards followed and observed.

Y (100%) **NO (0)**

1.3 Resolution standards followed and observed

Y (100%) **NO (0)**

1.4 Work history standards followed and observed

Y (100%) **NO (0)**

1.5 Custom Tab standards followed and observed. KNOWledge Base entry describing Custom Tab field used when field NOT kNOwn.

Y (100%) **NO (0)**

1.6 Routing standards followed and observed.

Y (100%) **NO (0)**

1.7 Templates used where applicable

Y (100%) **NO (0)**

1.8 Contacting customer correctly when phone number is available (primary) or using e-mail when necessary (secondary)

Y (100%) **NO (0)**

1.9 Use of KNOwledge Base and other documentation to facilitate First Contact Resolution

Y (100%) **NO (0)**

1.10 Re-Opening standards followed and observed.

Y (100%) **NO (0)**

1.11 General Ticket Queue processing standards followed and observed.

Y (100%) **NO (0)**

1.12 Resolution Confirmation Queue processing standards followed and observed

Y (100%) **NO (0)**

Help Desk

1.13 Awaiting More Information Queue processing standards followed and observed

Y (100%)

NO (0)

PHONE STANDARDS

Section Score 100%

2.1 Initial Phone Greeting given according to Handbook for each inbound call.

Y (100%)

NO (0)

2.2 Asked for first and last name, good contact phone number, and verified email or asked for alternate for each phone call

Y (100%)

NO (0)

2.3 Excited to help while talking to the customer

Y (100%)

NO (0)

2.4 All phone transfers were per Handbook standards

Y (100%)

NO (0)

OTHER RESPONSIBILITIES

Section Score 100%

3.1 Looks up customer in)-Key and verifies account found is correct for each customer

Y (100%)

NO (0)

3.2 Begins making ticket while on the call with the customer.

Y (100%)

NO (0)

3.3 Takes NOtes or completes Work History while on the call with the customer

Y (100%)

NO (0)

3.4 Attempts to troubleshoot the issue

Y (100%)

NO (0)

3.5 Exhausts all resources before placing customer on hold and asking Floordesk Analyst

Y (100%)

NO (0)

3.6 When asking Floordesk Analyst a question, has all information ready without having to go back to ticket, workstation, customer

Y (100%)

NO (0)

Help Desk

3.7 Resolved Tickets were confirmed to be closed with the customer



3.8 During downtime, reviewed training documentation.



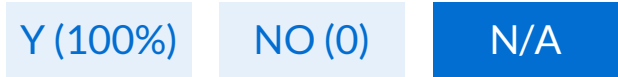
Insurance Auto

OPENING SCRIPT/GREETING Section Score 0%

1.1 Proper greeting "Thank you for calling InNOvative Solutions Providing Unique Policyholder Experiences in Insurance Services"

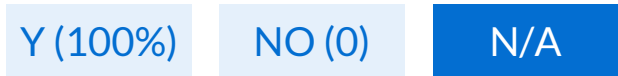


1.2 Agent begins conversation with a open question



INFORMATION/VERIFICATION Section Score 0%

2.1 Agent verified vehicle Year, Make & Model

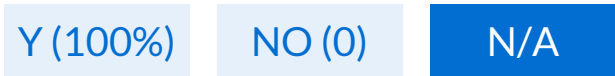


2.2 Agent verified policyholder's driving record

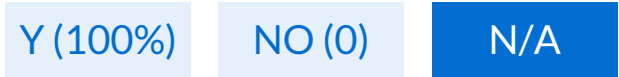


INFORMATION/VERIFICATION Section Score 0%

2.1 Agent verified vehicle Year, Make & Model



2.2 Agent verified policyholder's driving record

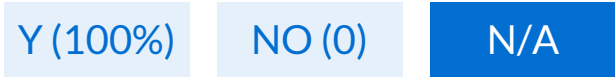


APPLICATION MANAGEMENT Section Score 0%

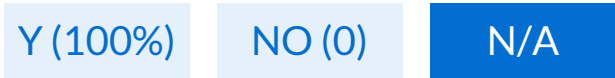
3.1 Efficient and effective utilization of quote pricing application



3.2 Stays within appropriate applications



3.3 Efficient and effective utilization of vehicle information application



Insurance Auto

3.4 Efficient and effective use of driving record application

Y (100%) NO (0) N/A

AGENT OWNERSHIP/CALL CONTROL Section Score 0%

4.1 Agent directly handles all of the policyholder's needs

5 (100%) 4 (80%) 3 (60%)
 2 (40%) 1 (20%) 0 (0%)
 N/A

UPS ELL/ ADD-ON Section Score 0%

5.1 Suggests policyholder bundle auto with InNOvative Solutions Homeowners insurance

Y (100%) NO (0) N/A

OVERCOMING OBJECTIONS Section Score 0%

6.1 Effectively handles objections by asking probing questions

Y (100%) NO (0) N/A

CLOSING SCRIPT/SUMMARY Section Score 0%

7.1 Reads and gains approval of disclosures

Y (100%) NO (0) N/A

7.2 Sends an email confirmation of all transactions

Y (100%) NO (0) N/A

7.3 Agent thanks policyholder for doing business with InNOvative Solutions

Y (100%) NO (0) N/A

Insurance Sales

OPENING SCRIPT/GREETING Section Score 100%

1.1 Proper greeting "Thank you for calling InNOvative Solutions Providing Unique Experiences in Insurance Services"

Y (100%) NO (0)

1.2 Agent advises that the call may be recorded and/or monitored for security purposes

Y (100%) NO (0)

Insurance Sales

INFORMATION/VERIFICATION Section Score 100%

2.1 Agent asks for vehicle make, model and year

Y (100%)	NO (0)	N/A
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2.2 Agent asks for VIN number 10.00%

Y (100%)	NO (0)	N/A
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2.3 Agent verifies car information via VIN number lookup application

Y (100%)	NO (0)	N/A
----------	--------	-----

2.4 Agent asks for drivers license number

Y (100%)	NO (0)	N/A
----------	--------	-----

2.5 Agent verifies address via driving record look up application

Y (100%)	NO (0)	N/A
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2.6 Agent checks driving record using driving record locator application

Y (100%)	NO (0)	N/A
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2.7 Agent verifies driving record information with policyholder

Y (100%)	NO (0)	N/A
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2.8 Overall, Agent effectively uses applications for verification

Y (100%)	NO (0)	N/A
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PRICING/QUOTE Section Score 100%

3.1 Agent asks for type of coverage policyholder is seeking

Y (100%)	NO (0)	N/A
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3.2 Agent makes suggestion regarding coverage

Y (100%)	NO (0)	N/A
----------	--------	-----

3.3 Agent uses Pricing Tool to calculate quote

Y (100%)	NO (0)	N/A
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3.4 Agent provides quote clearly and concisely

Y (100%)	NO (0)	N/A
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Insurance Sales

OVERCOMING OBJECTIONS

Section Score 100%

4.1 Agent asks probing questions for changes to policyholder circumstance {life events, marriage, divorce, birth, etc)

HIGHLY EFFECTIVE (100%)

MODERATELY EFFECTIVE (70%)

SLIGHTLY EFFECTIVE (40%)

NOT EFFECTIVE (10%)

MISSED OPPORTUNITY (0%)

4.2 Agent asks about home ownership

Y (100%)

NO (0)

N/A

4.3 Did your rates go up after previous accidents?

Y (100%)

NO (0)

N/A

4.4 Did you have to pay for a rental car while your vehicle was being repaired?

Y (100%)

NO (0)

N/A

4.5 Agent asks if vehicle has any Advanced Safety Features

Y (100%)

NO (0)

N/A

4.6 Agent offers InNOvative Solutions bundling of auto and home and/or additional products such as Life 10.00%

HIGHLY EFFECTIVE (100%)

MODERATELY EFFECTIVE (70%)

SLIGHTLY EFFECTIVE (40%)

NOT EFFECTIVE (10%)

MISSED OPPORTUNITY (0%)

4.7 Agent offers InNOvative Solutions Accident Forgiveness

Y (100%)

NO (0)

N/A

4.8 Agent offers Free Rental Car coverage through InNOvation Solutions

Y (100%)

NO (0)

N/A

4.9 Agent offers InNOvative Solutions Advanced Safety Features Discount

Y (100%)

NO (0)

N/A

Insurance Sales

4.10 Agent effectively counters any competition objections and provides appropriate offerings

HIGHLY EFFECTIVE (100%)

MODERATELY EFFECTIVE (70%)

SLIGHTLY EFFECTIVE (40%)

NOT EFFECTIVE (10%)

MISSED OPPORTUNITY (0%)

CLOSING SCRIPT/SUMMARY Section Score 100%

5.1 Agent follows processing steps including transfer to next level or licensed representative

Y (100%)

NO (0)

N/A

5.2 Reads and gains approval of all required disclosures

Y (100%)

NO (0)

N/A

5.3 Agent thanks policyholder for doing business with InNOvative Solutions

Y (100%)

NO (0)

Retail

OPENING SCRIPT/GREETING Section Score 100%

1.1 Agent used proper greeting "Thank you for calling InNOvative Solutions Providing Unique Experiences in Retail Services"

Y (100%)

NO (0)

1.2 Agent advises that the call will be monitored or recorded for quality purposes

Y (100%)

NO (0)

1.3 Agent verifies customer account information or security questions

Y (100%)

NO (0)

N/A

1.4 Agent expresses gratitude for customer loyalty {elite status} or concern for customer dissatisfaction

Y (100%)

NO (0)

N/A

APPLICATION MANAGEMENT Section Score 100%

2.1 Agent references appropriate retail and promotional resources

Y (100%)

NO (0)

N/A

Retail

2.2 Agent confirms customer elite account status or opportunity to upgrade

Y (100%)	NO (0)	N/A
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2.3 Agent accesses customer purchase history in the order management system

Y (100%)	NO (0)	N/A
----------	--------	-----

AGENT OWNERSHIP/CALL CONTROL Section Score 100%

3.1 Agent identifies and addresses the nature of customer's initial question or request (purchase, promo, order management)

Y (100%)	NO (0)	N/A
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3.2 Agent assesses level of authority; escalates appropriately

Y (100%)	NO (0)	N/A
----------	--------	-----

3.3 Agent gathers contact information and asks permission before putting caller on hold

Y (100%)	NO (0)	N/A
----------	--------	-----

3.4 Agent uses proper transfer procedures to expedite the call

Y (100%)	NO (0)	N/A
----------	--------	-----

UPS ELL/ ADD-ON Section Score 100%

4.1 Agent verifies customer eligibility for current and soon-to-be promotions

Y (100%)	NO (0)	N/A
----------	--------	-----

4.2 Agent recommends InNOvative Solutions Elite Client promotional offers, upgrades or add-on products or services

Y (100%)	NO (0)	N/A
----------	--------	-----

CLOSING SCRIPT/SUMMARY Section Score 100%

5.1 Agent thanks customer for doing business with InNOvative Solutions

Y (100%)	NO (0)
----------	--------

5.2 Agent summarizes the call and sends an email confirmation of all transactions

Y (100%)	NO (0)	N/A
----------	--------	-----

Service Desk

GREETING

Section Score 100%

1.1 Answered the call with a proper warm greeting - salutation - identified company - provided name - used name - offer assistance

Y (100%)

NO (0)

1.2 Appropriately identified caller and respected confidentiality requirements

Y (100%)

NO (0)

PROFESSIONALISM

Section Score 100%

2.1 Used effective questioning techniques to accurately identify the reason for calling - paraphrased to ensure understanding

Y (100%)

NO (0)

2.2 The call was handled with tact and professionalism

Y (100%)

NO (0)

2.3 Demonstrated ownership of the call - and de-escalated or escalated as appropriate

Y (100%)

NO (0)

2.4 Readily demonstrated a willingness to listen to inquiries and concerns

Y (100%)

NO (0)

COMMUNICATION

Section Score 100%

3.1 Gave the customer undivided attention and used active listening skills

Y (100%)

NO (0)

3.2 Adjusted communication style to accommodate the caller

Y (100%)

NO (0)

3.3 Avoided long silences - interruptions - talk over events

Y (100%)

NO (0)

3.4 Tone of voice was friendly and amicable - NOT raised in frustration or anger at any point

Y (100%)

NO (0)

3.5 Simplified language - avoided using jargon - slang - acronyms

Y (100%)

NO (0)

Service Desk

3.6 Presented information and solutions in a positive light



3.7 Demonstrated empathy when required



3.8 Demonstrated call control and efficient handling of the call



3.9 Avoided negative expressions: IE: You are wrong - Listen to me -That's NOt something I can help you with



KNOWLEDGE AND COMPLIANCE Section Score 100%

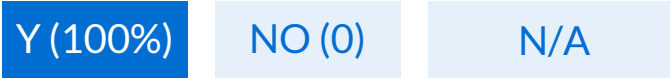
4.1 Provided comprehensive - clear - accurate - and objective information



4.2 Effectively utilized all resources available



4.3 Demonstrated hold courtesies: obtained permission - advise back 1 minute - check in - thanked for hold



4.4 Demonstrated transfer courtesies: obtained permission - explained why and to whom - briefed receiver - NOt exceed 2x redirects



4.5 Demonstrated message courtesies: offered explanation in positive light and provided reasonable estimate on response time



4.6 Documented all required entries in the CRMS when required



RESOLUTION Section Score 100%

5.1 Took ownership for resolution - did NOt take message or transfer unnecessarily



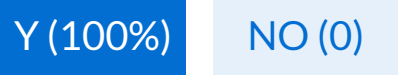
Service Desk

5.2 Confirmed that all customer needs were met and resolved with first point of contact



CLOSURE Section Score 100%

6.1 Recapped outcome and committed to reasonable timelines and expectations on next steps



6.2 Used customer's name and provided a warm thank you for contacting us 50.00%





AI Agent Scorecard Templates

Industry-ready AI agent scorecard templates that turn every automated interaction into a compliant, high-quality customer experience.

Financial

Context Handling

Section Score 20.00

1.1 Did the AI Agent correctly retain and use prior account, transaction, or inquiry details without requiring re-verification?

Y (100%)

NO (0)

N/A

1.2 Did the AI Agent clearly communicate uncertainty around pricing or eligibility?

Y (100%)

NO (0)

N/A

CUSTOMER EFFORT

Section Score 20.00

2.1 Did the customer avoid repeating sensitive financial or identity information?

Y (100%)

NO (0)

N/A

2.2 Did the AI Agent minimize transfers or escalations to a banker or specialist?

Y (100%)

NO (0)

N/A

Customer Frustration

Section Score 20.00

3.1 Did the customer express concern regarding account access, fraud, fees, or financial decisions?

Y (100%)

NO (0)

N/A

3.2 Did the AI Agent provide reassurance while maintaining regulatory-appropriate language?

Y (100%)

NO (0)

N/A

3.3 Did the agent avoid dismissing the customer's emotions or complaints?

Y (100%)

NO (0)

N/A

Language & Tone

Section Score 20.00

4.1 Did the AI Agent explain financial concepts in clear, compliant, NON-jargon language?

Y (100%)

NO (0)

N/A

4.2 Did the AI Agent adapt tone appropriately for high-stress financial situations (fraud, denial, errors)?

Y (100%)

NO (0)

N/A

Resolution Outcome

Section Score 20.00

5.1 Did the AI Agent provide accurate, compliant financial guidance or next steps?

Y (100%)

NO (0)

N/A

5.2 Did the interaction conclude with clear expectations for follow-up, documentation, or resolution timing?

Y (100%)

NO (0)

N/A

Logistics

Context Handling

Section Score 20.00

1.1 Did the AI Agent correctly track shipment details, locations, ETAs, and special instructions throughout the interaction?

Y (100%)

NO (0)

N/A

1.2 Did the AI Agent clearly communicate uncertainty regarding capacity, timing, or delivery constraints?

Y (100%)

NO (0)

N/A

CUSTOMER EFFORT

Section Score 20.00

2.1 Did the customer avoid repeating shipment, billing, or equipment information?

Y (100%)

NO (0)

N/A

2.2 Did the AI Agent proactively capture all required logistics data in one interaction?

Y (100%)

NO (0)

N/A

Customer Frustration

Section Score 20.00

3.1 Did the customer express frustration related to delays, capacity, routing, or missed expectations?

Y (100%)

NO (0)

N/A

3.2 Did the AI Agent ackNOwledge urgency and business impact appropriately?

Y (100%)

NO (0)

N/A

Language & Tone

Section Score 20.00

4.1 Did the AI Agent use clear operational language without internal logistics jargon?

Y (100%)

NO (0)

N/A

4.2 Did the AI Agent remain calm, confident, and solution-oriented under time pressure?

Y (100%)

NO (0)

N/A

Resolution Outcome

Section Score 20.00

5.1 Did the AI Agent commit to realistic timelines based on capacity guidelines?

Y (100%)

NO (0)

N/A

5.2 Did the interaction end with clear next steps for dispatch, pickup, or follow-up?

Y (100%)

NO (0)

N/A

Healthcare

Context Handling Section Score 20.00

1.1 Did the AI Agent correctly retain patient context, appointment details, and prior information?

Y (100%) NO (0) N/A

1.2 Did the AI Agent appropriately communicate uncertainty without providing medical advice beyond scope?

Y (100%) NO (0) N/A

CUSTOMER EFFORT Section Score 20.00

2.1 Did the patient avoid repeating personal or appointment information?

Y (100%) NO (0) N/A

2.2 Did the AI Agent proactively provide directions, instructions, or reminders?

Y (100%) NO (0) N/A

Customer Frustration Section Score 20.00

3.1 Did the patient express anxiety, confusion, or urgency regarding care?

Y (100%) NO (0) N/A

3.2 Did the AI Agent demonstrate appropriate empathy and reassurance?

Y (100%) NO (0) N/A

Language & Tone Section Score 20.00

4.1 Did the AI Agent avoid clinical jargon and explain information in patient-friendly terms?

Y (100%) NO (0) N/A

4.2 Did the AI Agent adapt tone for sensitive or emotional situations?

Y (100%) NO (0) N/A

Resolution Outcome Section Score 20.00

5.1 Did the AI Agent accurately provide scheduling, location, or procedural information?

Y (100%) NO (0) N/A

5.2 Did the interaction close with clear confirmation of next steps or reminders?

Y (100%) NO (0) N/A

Hospital

Context Handling Section Score 20.00

1.1 Did the AI Agent correctly use patient, member, or caller context across the interaction?

Y (100%) NO (0) N/A

1.2 Did the AI Agent comply with HIPAA-appropriate information handling?

Y (100%) NO (0) N/A

CUSTOMER EFFORT Section Score 20.00

2.1 Did the caller avoid repeating reason for contact or patient details?

Y (100%) NO (0) N/A

2.2 Did the AI Agent efficiently route or resolve the inquiry without unnecessary handoffs?

Y (100%) NO (0) N/A

Customer Frustration Section Score 20.00

3.1 Did the caller express concern related to care, coverage, or access?

Y (100%) NO (0) N/A

3.2 Did the AI Agent take ownership and reassure the caller appropriately?

Y (100%) NO (0) N/A

Language & Tone Section Score 20.00

4.1 Did the AI Agent communicate professionally without clinical or internal jargon?

Y (100%) NO (0) N/A

4.2 Did the AI Agent adjust tone based on caller emotion or urgency?

Y (100%) NO (0) N/A

Resolution Outcome Section Score 20.00

5.1 Did the AI Agent provide accurate guidance aligned with health plan or hospital policy?

Y (100%) NO (0) N/A

5.2 Did the interaction conclude with clear follow-up expectations?

Y (100%) NO (0) N/A

Government

Context Handling Section Score 20.00

1.1 Did the AI Agent correctly retain case, application, or claim context?

Y (100%) NO (0) N/A

1.2 Did the AI Agent appropriately communicate uncertainty regarding eligibility, processing, or timelines?

Y (100%) NO (0) N/A

CUSTOMER EFFORT Section Score 20.00

2.1 Did the citizen avoid repeating personal or case information?

Y (100%) NO (0) N/A

2.2 Did the AI Agent clearly guide the citizen through required steps or documentation?

Y (100%) NO (0) N/A

Customer Frustration Section Score 20.00

3.1 Did the citizen express frustration with delays, eligibility, or bureaucracy?

Y (100%) NO (0) N/A

3.2 Did the AI Agent remain neutral, respectful, and reassuring?

Y (100%) NO (0) N/A

Language & Tone Section Score 20.00

4.1 Did the AI Agent avoid legal or bureaucratic jargon when possible?

Y (100%) NO (0) N/A

4.2 Did the AI Agent maintain a calm, authoritative, and respectful tone?

Y (100%) NO (0) N/A

Resolution Outcome Section Score 20.00

5.1 Did the AI Agent clearly explain next steps, timelines, or self-service options?

Y (100%) NO (0) N/A

5.2 Did the citizen leave the interaction understanding what will happen next?

Y (100%) NO (0) N/A

Help Desk

Context Handling

Section Score 20.00

1.1 Did the AI Agent retain issue details, troubleshooting steps, and ticket context?

Y (100%)

NO (0)

N/A

1.2 Did the AI Agent communicate uncertainty when escalation or additional research was required?

Y (100%)

NO (0)

N/A

CUSTOMER EFFORT

Section Score 20.00

2.1 Did the user avoid repeating technical details or symptoms?

Y (100%)

NO (0)

N/A

2.2 Did the AI Agent leverage kNOwledge base content to reduce back-and-forth?

Y (100%)

NO (0)

N/A

Customer Frustration

Section Score 20.00

3.1 Did the user express frustration due to downtime or repeated failures?

Y (100%)

NO (0)

N/A

3.2 Did the AI Agent demonstrate empathy and ownership of the issue?

Y (100%)

NO (0)

N/A

Language & Tone

Section Score 20.00

4.1 Did the AI Agent explain technical concepts in simple, user-friendly terms?

Y (100%)

NO (0)

N/A

4.2 Did the AI Agent avoid unnecessary acronyms or internal system language?

Y (100%)

NO (0)

N/A

Resolution Outcome

Section Score 20.00

5.1 Did the AI Agent resolve the issue at first contact or set clear escalation expectations?

Y (100%)

NO (0)

N/A

5.2 Did the interaction close with confirmation that the issue was resolved or next steps were understood?

Y (100%)

NO (0)

N/A

Insurance – Auto (Service)

Context Handling

Section Score 20.00

1.1 Did the AI Agent retain vehicle, policy, and driver information correctly?

Y (100%)

NO (0)

N/A

1.2 Did the AI Agent clearly communicate uncertainty regarding coverage or claims decisions?

Y (100%)

NO (0)

N/A

CUSTOMER EFFORT

Section Score 20.00

2.1 Did the policyholder avoid repeating vehicle or policy details?

Y (100%)

NO (0)

N/A

2.2 Did the AI Agent efficiently guide the policyholder through required steps?

Y (100%)

NO (0)

N/A

Customer Frustration

Section Score 20.00

3.1 Did the policyholder express frustration regarding claims, pricing, or coverage?

Y (100%)

NO (0)

N/A

3.2 Did the AI Agent respond with reassurance while remaining compliant?

Y (100%)

NO (0)

N/A

Language & Tone

Section Score 20.00

4.1 Did the AI Agent explain coverage, deductibles, and policies clearly?

Y (100%)

NO (0)

N/A

4.2 Did the AI Agent maintain a calm and professional tone during objections?

Y (100%)

NO (0)

N/A

Resolution Outcome

Section Score 20.00

5.1 Did the AI Agent provide accurate coverage or claim information?

Y (100%)

NO (0)

N/A

5.2 Did the interaction close with confirmation of next steps or documentation?

Y (100%)

NO (0)

N/A

Insurance – Sales

Context Handling

Section Score 20.00

1.1 Did the AI Agent retain prospect details and prior responses throughout the quote process?

Y (100%)

NO (0)

N/A

1.2 Did the AI Agent clearly communicate uncertainty around pricing or eligibility?

Y (100%)

NO (0)

N/A

CUSTOMER EFFORT

Section Score 20.00

2.1 Did the prospect avoid repeating personal or vehicle information?

Y (100%)

NO (0)

N/A

2.2 Did the AI Agent streamline the quote process effectively?

Y (100%)

NO (0)

N/A

Customer Frustration

Section Score 20.00

3.1 Did the prospect express hesitation or objections?

Y (100%)

NO (0)

N/A

3.2 Did the AI Agent appropriately address objections with relevant offerings?

Y (100%)

NO (0)

N/A

Language & Tone

Section Score 20.00

4.1 Did the AI Agent explain pricing and coverage clearly without pressure?

Y (100%)

NO (0)

N/A

4.2 Did the AI Agent adjust tone based on buying signals or resistance?

Y (100%)

NO (0)

N/A

Resolution Outcome

Section Score 20.00

5.1 Did the AI Agent provide an accurate quote and required disclosures?

Y (100%)

NO (0)

N/A

5.2 Did the interaction conclude with a clear close, transfer, or next step?

Y (100%)

NO (0)

N/A

Retail

Context Handling

Section Score 20.00

1.1 Did the AI Agent retain customer account, order, or promotion context?

Y (100%)

NO (0)

N/A

1.2 Did the AI Agent clearly communicate uncertainty around inventory or delivery?

Y (100%)

NO (0)

N/A

CUSTOMER EFFORT

Section Score 20.00

2.1 Did the customer avoid repeating order or account details?

Y (100%)

NO (0)

N/A

2.2 Did the AI Agent proactively access purchase history when relevant?

Y (100%)

NO (0)

N/A

Customer Frustration

Section Score 20.00

3.1 Did the customer express dissatisfaction related to orders, returns, or promotions?

Y (100%)

NO (0)

N/A

3.2 Did the AI Agent respond with empathy and ownership?

Y (100%)

NO (0)

N/A

Language & Tone

Section Score 20.00

4.1 Did the AI Agent use friendly, brand-appropriate language?

Y (100%)

NO (0)

N/A

4.2 Did the AI Agent avoid internal retail or system jargon?

Y (100%)

NO (0)

N/A

Resolution Outcome

Section Score 20.00

5.1 Did the AI Agent resolve the inquiry or provide accurate next steps?

Y (100%)

NO (0)

N/A

5.2 Did the interaction end with confirmation and appreciation for the customer?

Y (100%)

NO (0)

N/A

Service Desk

(Enterprise / Internal)

Context Handling

Section Score 20.00

1.1 Did the AI Agent retain caller identity, issue history, and prior actions?

Y (100%)

NO (0)

N/A

1.2 Did the AI Agent communicate uncertainty appropriately when escalation was required?

Y (100%)

NO (0)

N/A

CUSTOMER EFFORT

Section Score 20.00

2.1 Did the employee avoid repeating issue details?

Y (100%)

NO (0)

N/A

2.2 Did the AI Agent efficiently document and route the request?

Y (100%)

NO (0)

N/A

Customer Frustration

Section Score 20.00

3.1 Did the caller express frustration impacting productivity?

Y (100%)

NO (0)

N/A

3.2 Did the AI Agent demonstrate ownership and de-escalation?

Y (100%)

NO (0)

N/A

Language & Tone

Section Score 20.00

4.1 Did the AI Agent communicate clearly without excessive technical jargon?

Y (100%)

NO (0)

N/A

4.2 Did the AI Agent maintain a professional, respectful tone?

Y (100%)

NO (0)

N/A

Resolution Outcome

Section Score 20.00

5.1 Did the AI Agent resolve the issue at first contact or clearly outline next steps?

Y (100%)

NO (0)

N/A

5.2 Did the interaction conclude with confirmation that expectations were set?

Y (100%)

NO (0)

N/A

About Calabrio

Calabrio powers people and businesses with actionable intelligence. Our AI-powered, cloud-native Calabrio ONE suite maximises agent performance, turning every interaction into a strategic advantage.

Trusted worldwide, our workforce and conversation intelligence solutions help teams work smarter, respond faster, and connect better to drive measurable business outcomes.

[Learn more](#)