FREE TEMPLATE

Call QA scorecards that score the same way twice.

Three ready-to-use scorecards for support, sales discovery and HR interview calls. Each check says what passes, so an analyst and software reach the same answer.

Mostly yes or no
Binary checks score consistently.

Evidence written down
Every score points to a line in the call.

Behavior, not outcome
Score what the agent did.

Compliance marked
One miss flags the call.

TEMPLATE 01

Inbound support call

#	CHECK	TYPE	PASSES WHEN	SCORE
1	**Greeting with company and own name**	YES/NO	Both stated in the first 15 seconds	Y / N / NA
2	**Identity verified before account details**	COMPLIANCE	Two verification items confirmed before account data is shared	Y / N / NA
3	**Issue restated to the caller**	YES/NO	Agent summarizes the problem in their own words	Y / N / NA
4	**Correct process followed**	YES/NO	Steps match the knowledge-base article for the issue type	Y / N / NA
5	**Hold over 60 seconds explained**	YES/NO	Reason given and caller checked on before 60 seconds	Y / N / NA
6	**Required disclosure read**	COMPLIANCE	Text read in full, not paraphrased	Y / N / NA
7	**Resolution or next step confirmed**	YES/NO	Agent states what happens next and by when	Y / N / NA
8	**Callback offered when unresolved**	YES/NO	Offered whenever the issue is not closed on the call	Y / N / NA
9	**Further help offered before closing**	YES/NO	Agent asks if anything else is needed	Y / N / NA
10	**Distress or escalation handled well**	JUDGMENT	Flagged for analyst review when the caller asks for a manager or shows distress	Y / N / NA

Call ID _____ Agent _____ Reviewer _____ Date _____ Score ____ / ____

TEMPLATE 02

Sales discovery call

#	CHECK	TYPE	PASSES WHEN	SCORE
1	**Agenda set and agreed**	YES/NO	Rep states the purpose and checks it with the buyer in the first 3 minutes	Y / N / NA
2	**Current process explored**	YES/NO	Rep asks how the buyer handles the problem today	Y / N / NA
3	**Pain quantified**	YES/NO	Buyer states a cost, time or volume figure	Y / N / NA
4	**Decision process asked**	YES/NO	Rep asks who else is involved and how a decision gets made	Y / N / NA
5	**Timeline asked**	YES/NO	Rep asks when a solution needs to be in place and why	Y / N / NA
6	**Competition or alternatives asked**	YES/NO	Rep asks what else is being considered, including doing nothing	Y / N / NA
7	**Talk-listen balance**	YES/NO	Buyer speaks for at least 40% of the call	Y / N / NA
8	**Next step booked**	YES/NO	A dated next meeting or action is agreed before the call ends	Y / N / NA
9	**No unapproved pricing or discount promises**	COMPLIANCE	No price, discount or contract term outside the approved range	Y / N / NA

Call ID _____ Agent _____ Reviewer _____ Date _____ Score ____ / ____

TEMPLATE 03

HR interview call (exit, engagement or new-hire check-in)

#	CHECK	TYPE	PASSES WHEN	SCORE
1	**Purpose and confidentiality explained**	COMPLIANCE	Interviewer states why the call is happening and how answers are used	Y / N / NA
2	**Consent to continue and record**	COMPLIANCE	Explicit yes before the first question	Y / N / NA
3	**All guide questions covered**	YES/NO	Every mandatory question in the guide is asked	Y / N / NA
4	**Vague answers followed up**	YES/NO	At least one follow-up on any answer under one sentence	Y / N / NA
5	**No leading questions**	YES/NO	Questions do not suggest an answer	Y / N / NA
6	**Escalation topics flagged**	COMPLIANCE	Harassment, safety, legal or distress topics trigger the escalation step	Y / N / NA
7	**Employee's own words captured**	YES/NO	Summary includes verbatim quotes for the main reasons given	Y / N / NA
8	**Close and next steps explained**	YES/NO	Interviewer thanks the employee and says what happens with the feedback	Y / N / NA

Call ID _____ Agent _____ Reviewer _____ Date _____ Score ____ / ____

SCORING

How to score and calibrate

Scoring

- Each yes/no check is one point. Call score = points earned / checks that applied.
- A failed COMPLIANCE check flags the call, whatever the score.
- JUDGMENT checks do not count toward the score. They send the call to an analyst.
- Mark checks NA when they could not apply. Do not pass them.

Monthly calibration

- Pick 30 calls across agents and outcomes.
- Two analysts score them independently.
- If you use software, score the same 30 calls with it.
- Any check with frequent disagreement is ambiguous. Rewrite it and score again.

CALIBRATION LOG

CHECK	ANALYST A	ANALYST B	SOFTWARE	AGREE?	REWRITE NOTE

SCORE EVERY CALL, NOT A SAMPLE

Most QA teams review 2 to 5% of calls.

Proponent checks every call against your own scorecard and writes the result into the platform you already use. proponentapp.com/solutions/voice-operations