Weekly Customer Support QA Worksheet

Give each provider the same fictional support interaction and the same policy and scoring rules. Record only the evidence needed for the review. Leave out customer names, account identifiers and other personal details.

PROVIDER / TEAM	REVIEWER	WEEK OF	INTERACTION ID

QUALITY CHECK	EVIDENCE REVIEWED	STATUS	ACTION OWNER	NEXT REVIEW
Answer accuracy Did the agent give an accurate answer and follow the approved policy for this interaction?		☐ Pass ☐ Follow-up		
Documentation Did the interaction record show what the agent checked, what they did, and what happens next?		☐ Pass ☐ Follow-up		
Escalation If the issue required escalation, did it reach the designated owner with enough information to act?		☐ Pass ☐ Follow-up		
Coaching What should the agent keep doing or change, and what will the team lead check at the next review?		☐ Pass ☐ Follow-up		

How to use it

Record when escalation was unnecessary. For escalations, use the owner named in the client-approved procedure. Only designated client personnel can authorize policy exceptions. Agree on coaching actions, follow-up owners and the next review date.

Fictional example

A shopper requests a refund outside the return policy. Check whether the agent explained the policy accurately, recorded the request, routed the exception to the designated client approver, and gave the reviewer enough to plan coaching.

REVIEWER SIGNATURE	TEAM LEAD SIGNATURE	DATE

Free to use and share