



## Inbound communications check

If the member of staff has done a particularly good job, remember to mention this in comments.

| Section   | Criteria  | Select outcome | Comments |
|---|---|----------------|----------|
| <b>Greeting</b><br>Creating a good first impression of Social Security Scotland.  | <ul style="list-style-type: none"><li>• Provided own name.</li><li>• Identified that Social Security Scotland was calling.</li></ul>  |                |          |
| <b>Call identification</b><br>Notifying that the call is recorded and ensuring all security questions are valid and relevant. | <ul style="list-style-type: none"><li>• Confirmed client's National Insurance Number.</li><li>• Followed full first- and second-line ID criteria and in correct order.</li></ul>  |                |          |
| <b>Tone</b><br>Keeping a professional manner during the call.   | <ul style="list-style-type: none"><li>• Spoke at a steady rate.</li><li>• Spoke in a clear and understandable manner.</li><li>• Used plain English with no jargon.</li><li>• Showed empathy, patience and positivity.</li></ul>   |                |          |
| <b>Effective listening</b><br>Listening to clients and identifying their needs.   | <ul style="list-style-type: none"><li>• Paraphrased where appropriate.</li><li>• Asked and answered questions where appropriate.</li><li>• Identified and demonstrated understanding of all the client's issues.</li></ul>  |                |          |
| <b>Call structure</b><br>Gathering information in a logical and structured way.   | <ul style="list-style-type: none"><li>• Referred to notes on SPM.</li><li>• Took ownership of the call and did not place blame.</li><li>• Answered questions accurately.</li><li>• If client is put on hold, set expectations for how long this will be.</li></ul>  |                |          |
| <b>Call closure</b><br>Checking client's understanding and wrapping up call effectively                                       | <ul style="list-style-type: none"><li>• Checked client's understanding.</li><li>• Restated any actions to be taken by the client.</li><li>• Used phrase such as 'Is there anything else I can help with today?'</li><li>• Thanked the client.</li><li>• Recorded clear information in SPM under Communications.</li></ul>   |                |          |
| <b>Call transfers</b><br>Directing the client to the most appropriate area.   | <ul style="list-style-type: none"><li>• Completed introduction and call identification.</li><li>• Identified where the call should be transferred.</li><li>• Carried out warm transfer so the client does not need to explain their circumstances again.</li><li>• Recorded the call in Communications.</li><li>• If the transfer failed, explained the appropriate next steps.</li></ul> |                |          |



# Outbound communications check

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| Section   | Criteria  | Select outcome | Comments |
|---|---|----------------|----------|
| <b>Pre Call (outbound)</b><br>Preparing for the upcoming call.  | <ul style="list-style-type: none"><li>• Used correct phone number.</li><li>• Considered language preferences or method of communication.</li></ul>  |                |          |
| <b>Greeting</b><br>Creating a good first impression of Social Security Scotland.  | <ul style="list-style-type: none"><li>• Provided own name.</li><li>• Identified that Social Security Scotland was calling.</li></ul>  |                |          |
| <b>Call identification</b><br>Notifying that the call is recorded and ensuring all security questions are valid and relevant. | <ul style="list-style-type: none"><li>• Followed full first- and second-line ID criteria and in correct order.</li><li>• Informed client that call is recorded.</li><li>• Informed client about how Social Security Scotland handles data.</li></ul>  |                |          |
| <b>Tone</b><br>Keeping a professional manner during the call.   | <ul style="list-style-type: none"><li>• Spoke at a steady rate.</li><li>• Spoke in a clear and understandable manner.</li><li>• Used plain English with no jargon.</li><li>• Showed empathy, patience and positivity.</li></ul>   |                |          |
| <b>Effective listening</b><br>Listening to clients and identifying their needs.   | <ul style="list-style-type: none"><li>• Paraphrased where appropriate.</li><li>• Asked and answered questions where appropriate.</li><li>• Identified and demonstrated understanding of all the client's issues.</li></ul>  |                |          |
| <b>Call structure</b><br>Gathering information in a logical and structured way.   | <ul style="list-style-type: none"><li>• Referred to notes on SPM.</li><li>• Took ownership of the call and did not place blame.</li><li>• Answered questions accurately.</li><li>• If client is put on hold, set expectations for how long this will be.</li></ul>  |                |          |
| <b>Call closure</b><br>Checking client's understanding and wrapping up call effectively                                       | <ul style="list-style-type: none"><li>• Checked client's understanding.</li><li>• Restated any actions to be taken by the client.</li><li>• Used phrase such as 'Is there anything else I can help with today?'</li><li>• Thanked the client.</li><li>• Recorded clear information in SPM under Communications.</li></ul>   |                |          |
| <b>Call transfers</b><br>Directing the client to the most appropriate area.   | <ul style="list-style-type: none"><li>• Completed introduction and call identification.</li><li>• Identified where the call should be transferred.</li><li>• Carried out warm transfer so the client does not need to explain their circumstances again.</li><li>• Recorded the call in Communications.</li><li>• If the transfer failed, explained the appropriate next steps.</li></ul> |                |          |
| <b>Leaving an answerphone message (outbound)</b>  | <ul style="list-style-type: none"><li>• Spoke clearly.</li><li>• Provided own name.</li><li>• Identified that Social Security Scotland was calling.</li><li>• Encouraged client to call back on 0800 182 2222.</li><li>• Avoided revealing reason for call.</li></ul>   |                |          |



# Webchat communications check

If the member of staff has done a particularly good job, remember to mention this in comments.

| Section   | Criteria  | Select outcome | Comments |
|---|---|----------------|----------|
| <b>Greeting</b><br>Creating a good first impression of Social Security Scotland.  | <ul style="list-style-type: none"><li>• Provided quick response.</li><li>• Provided own name.</li><li>• Identified ourselves as Social Security Scotland.</li></ul>   |                |          |
| <b>Call identification</b><br>Notifying that the call is recorded and ensuring all security questions are valid and relevant. | <ul style="list-style-type: none"><li>• Confirmed client's National Insurance Number.</li><li>• Followed full first- and second-line ID criteria and in correct order.</li></ul>  |                |          |
| <b>Tone</b><br>Keeping a professional manner during the call.   | <ul style="list-style-type: none"><li>• Used clear language with no jargon.</li><li>• Used correct spelling and grammar.</li><li>• Used appropriate sentence structure.</li><li>• Showed empathy, patience and positivity.</li><li>• Addressed client appropriately.</li></ul>  |                |          |
| <b>Effective listening</b><br>Listening to clients and identifying their needs.   | <ul style="list-style-type: none"><li>• Paraphrased where appropriate.</li><li>• Asked and answered questions where appropriate.</li><li>• Identified and demonstrated understanding of all the client's issues.</li></ul>  |                |          |
| <b>Chat structure</b><br>Gathering information in a logical and structured way.   | <ul style="list-style-type: none"><li>• Referred to notes on SPM.</li><li>• Took ownership of the conversation and did not place blame.</li><li>• Answered questions accurately.</li><li>• If there is a break in the conversation, set expectations for how long client will be waiting.</li></ul>                       |                |          |
| <b>Chat closure</b><br>Checking client's understanding and wrapping up chat effectively.                                      | <ul style="list-style-type: none"><li>• Checked client's understanding.</li><li>• Restated any actions to be taken by the client.</li><li>• Used phrase such as 'Is there anything else I can help with today?'</li><li>• Thanked the client.</li><li>• Recorded clear information in SPM under Communications.</li></ul> |                |          |