

Internal Account Review Agenda

Topic	Discussion
<p>Introduction & Agenda Overview</p>	<ul style="list-style-type: none"> ● Welcome and Purpose: <ul style="list-style-type: none"> ○ <i>“The goal of this call is to align internally on account health, agent performance, and overall support so we can stay proactive and address any issues before they reach the client.”</i> ● Build Rapport <ul style="list-style-type: none"> ○ Take a moment to connect with the TL and reinforce collaboration. Aim to understand how they prefer to be communicated with so you can work together more effectively. ● Agenda Preview: <ul style="list-style-type: none"> ○ If there were areas of opportunity identified in the last connect call, begin with an update on how those are trending, whether improvements are being made or challenges are persisting.
<p>Agent/Client Temp Check (5 min)</p>	<ul style="list-style-type: none"> ● Review general updates on the agent. The focus here is <i>not</i> on KPIs but on understanding how the agent is doing overall and whether any outside factors may be affecting their work. ● Key discussion points: <ul style="list-style-type: none"> ○ Agent reliability: <ul style="list-style-type: none"> ■ <i>How has attendance been?</i> ■ <i>Any callouts from WFD?</i> ■ <i>How many internet outages have been reported?</i> ○ Coaching calls: <ul style="list-style-type: none"> ■ <i>How many have been completed and what were the main topics covered?</i> ○ Sentiment: <ul style="list-style-type: none"> ■ <i>How is the agent’s morale?</i> ■ <i>Is there any risk of burnout, whether from work or personal factors?</i> ○ Hubstaff monitoring: <ul style="list-style-type: none"> ■ <i>Provide a brief overview of recent activity, conduct a quick live spot check, and don’t hesitate to call out any unusual patterns.</i> ○ Communication:

	<ul style="list-style-type: none"> ■ <i>Has the agent raised any hurdles, or have there been any lapses in communication with their client point of contact?</i>
<p>Performance Review (5 - 10 min)</p>	<ul style="list-style-type: none"> ● Take a deeper look at helpdesk performance. Ideally, pull up the dashboard live during the call. ● Review whether client-specific KPIs are being met. <i>If no KPIs are defined, check performance against standard TalentPop benchmarks.</i> ● Key items to review: <ul style="list-style-type: none"> ○ <i>First Response Time</i> ○ <i>Resolution Time</i> ○ <i>Tickets closed per hour during shift</i> ○ <i>End-of-day reports (confirm if these are client-facing)</i> ○ <i>CSAT week-to-week trends:</i> <ul style="list-style-type: none"> ■ <i>If the trend is positive, discuss how to continue replicating success.</i> ■ <i>If the trend is negative, align on actions to improve and prepare insights for client review if a check-in call is scheduled.</i> ● Identify major outliers and agree on next steps to address them. <ul style="list-style-type: none"> ○ Ex: CSAT was below TP’s benchmark → Opportunity to review DSATs on the call and determine if they were people or process-driven
<p>Client Goals</p>	<ul style="list-style-type: none"> ● Spend a few minutes reviewing the client’s main goals and confirm whether TalentPop is still aligned with them. Keep in mind that clients may sometimes express goals in broad terms, such as “<i>We just want inbox zero</i>” or “<i>We’re happy as long as CSAT is high.</i>” While these remarks may seem simple or light at first, they can quickly become pain points if agent performance is falling short. ● Aim to identify specific KPIs that the agent should be targeting. If the client has not defined KPIs, use TalentPop’s baseline standards as the benchmark. ● <i>If at any point we cannot confidently answer the question “What is this client’s primary goal in working with TalentPop?” then this is a red flag and requires deeper discussion with the client.</i> ● The client does not always need to provide a detailed framework. What matters is that we understand what they value most and use those insights as the foundation to guide performance and priorities.
<p>Best Practices</p>	<ul style="list-style-type: none"> ● Ensure you are coming to the conversation with insights as well! These questions are not all directed to the TL. Contribute if you have any insights that have come from the client or anything else you should be sharing with the TL to maintain strong calibration. ● If you have the same Team Lead across multiple accounts, combine your Internal Account Review to discuss multiple accounts. ● Loop in OM/CSTM support when:

	<ul style="list-style-type: none">○ There are ongoing issues with an account○ There isn't follow-through on the action plans that are agreed upon in the Internal Account Review