First Call Resolution Worksheet

Process Questions	Responses
1. How did the call come in? (e.g., staff, answering service, voicemail)	
2. Can the staff receiving the call manage the issue?	
3. If yes, document steps to be taken. If no, what staff role should manage the issue?	
4. How will the issue be directed to that role?	
5. What information does that role need?	
6. Can that role resolve the issue?	
7. If yes, document steps to be taken. If no, what role manages the process's next stage.	
8. How much time is needed between the handoffs?	
9. Repeat steps 4 – 8 as needed	