

Transfers without a clear yes remain the most common failure at 12.4%, down from 15.0% in August. Two agents account for over half.

REVIEW COVERAGE

99.8%

1,213 of 1,215 eligible calls
August 99.9%

CRITICAL-FAILURE RATE

2.1%

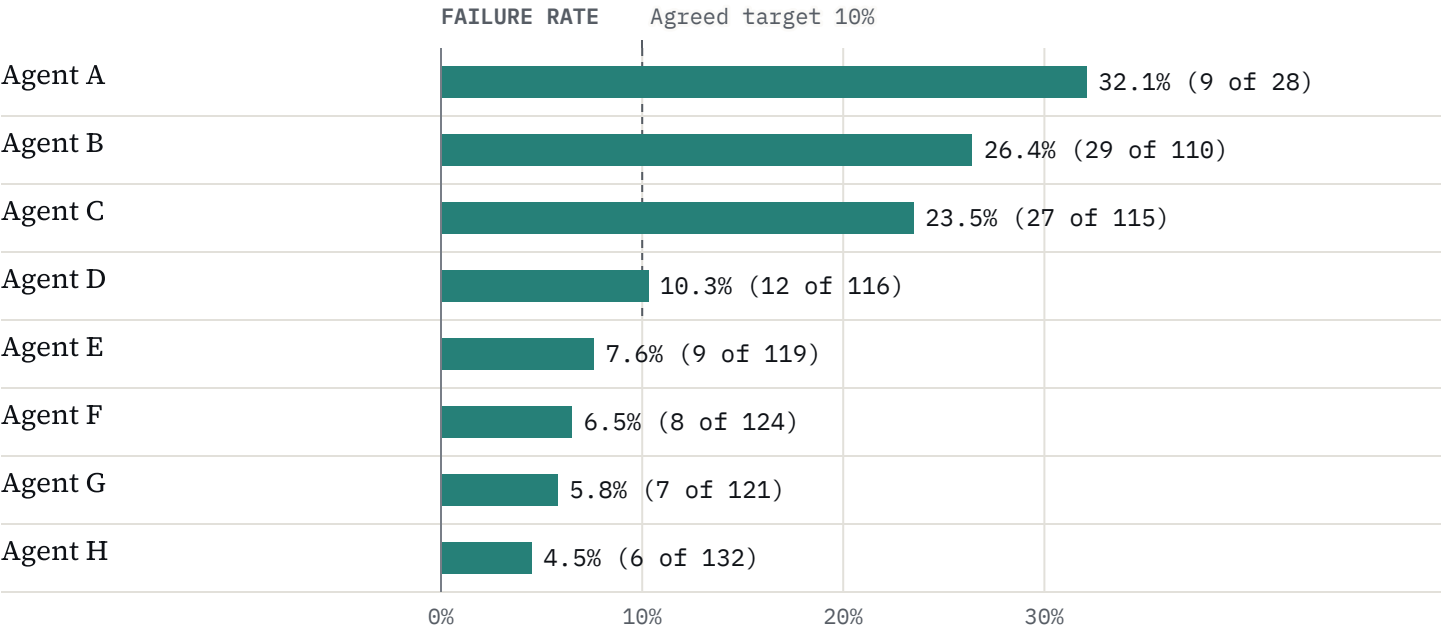
26 of 1,213 reviewed calls
up 0.5 pts from 1.6% in August

UNRESOLVED CRITICAL FINDINGS

2

1 open, 1 disputed
1 overdue

Two agents account for 56 of the 108 transfers without a clear yes. R06 failure rate by agent, September; agents shown as letters. By team: Team South 19.9% (69 of 347), Team North 7.4% (39 of 524). Dashed line: agreed target, under 10%. Too few calls to rank: Agent I.



Findings

- Transfers.** R06 failed on 12.4% (108 of 871) transfers, down 2.6 pts. Agent B and Agent C: 56 of the 108. Team South: 19.9%.
- Critical failures.** Up because the rule widened on Sep 14 (R05: 13 of 27 findings). On August's rules, 1.2% against 1.6%.
- Others.** 7 of 9 comparable requirements improved; price answers (R04) and read-backs (R09) rose.

READ WITH CARE

Scorecard changed Sep 14 (R05 now critical). Saturday shift added Sep 16. 2 calls not processed. 2 disputed findings still counted.

Actions, owners and next steps

1. Transfer coaching for two agents (R06) DONE
Team South lead • Follow-up 9.1% (1 of 11)
2. Transfer pairing for one agent (R06, R07) ACCEPTED
Team North lead • Target Fri, Oct 9
3. Price-line briefing for all agents (R04) ACCEPTED
Client operations manager • Target Fri, Oct 16
4. Close the overdue critical R01 finding OPEN
3 DAYS OVERDUE
Team North lead • Was due Tue, Sep 29
5. Decide the 2 open disputes, one critical DISPUTED
Ad Nomina • By Oct 5 and Oct 6

2 • COVERAGE AND SCOPE

Which calls and requirements were reviewed.

We reviewed every eligible call but 2.

1,256 calls received with a September call date (August: 1,274). Each call sits in exactly one category.

Reviewed

1,213 (96.6%)



Pending	0	0.0%
Could not be processed	2	0.2%
Excluded, under 30 seconds	31	2.5%
Not selected	10	0.8%

Exclusions and processing

- **Could not be processed: 2.** HP-19521 (Sep 2) and HP-19858 (Sep 10). Counted as eligible, so they lower coverage. Re-upload them for review.
- **Excluded: 31.** Under the 30-second minimum (August: 30).
- **Not selected: 10.** Saturday-shift calls on Sep 5 and 12, before that shift joined the scope.
- **Pending: 0.** Every call received by Oct 1 was processed.

Changes in review scope

- **Wed, Sep 16.** Saturday shift added: 9 reviewed calls, 0.7% of the month, under the 5% comparison flag.
- **Rejected upload.** 1 file on Sep 9 had an unreadable name (northgate_0909_call(3).mp3) and is not counted as received. Rename and resend it.

Where each requirement applied and could be evaluated

REQUIREMENT	SEVERITY	NOT APPLICABLE	NOT EVALUATED	PASSED	FAILED	FAILURE RATE
R01 Recording disclosure	CRITICAL	0	0	1,204	9	0.7% (9 of 1,213)
R02 Company and agent named	Standard	0	0	1,175	38	3.1% (38 of 1,213)
R03 Offer stated correctly	Standard	108	1	1,063	41	3.7% (41 of 1,104)
R04 Price answered plainly	Standard	612	1	529	71	11.8% (71 of 600)
R05 No savings, approval or insurance promises	CRITICAL	108	0	1,086	19	1.7% (19 of 1,105)
R06 Clear yes before transfer	Standard	341	1	763	108	12.4% (108 of 871)
R07 Handoff gives name and reason	Standard	420	1	728	64	8.1% (64 of 792)
R08 Stops after a no	CRITICAL	1,012	0	196	5	2.5% (5 of 201)
R09 Appointment time confirmed	Standard	902	1	288	22	7.1% (22 of 310)
R10 Close with next step	Standard	108	1	1,071	33	3.0% (33 of 1,104)

All 1,213 reviewed September calls. Not applicable: the situation did not arise. Not evaluated: we could not decide, for example when the recording drops out. Rates use passed and failed only.

3 • PERFORMANCE AND COMPARISON

September against August, requirement by requirement.

7 of 9 comparable requirements improved; price answers and appointment read-backs rose.

Failure rate on evaluated calls, August (ring) and September (dot). Changes in percentage points. Calls: evaluated calls, September / August.

	○ August ● September	CHANGE	CALLS
R06 Clear yes	12.4%● ○15.0%	down 2.6 pts	871 / 880
R04 Price answered	●11.8%, was 11.1%	up 0.7 pts	600 / 593
R07 Handoff	●8.1%, was 8.7%	down 0.6 pts	792 / 803
R09 Time confirmed	●7.1%, was 6.3%	up 0.8 pts	310 / 320
R03 Offer stated	●3.7%, was 4.2%	down 0.5 pts	1,104 / 1,108
R02 Name and company	●3.1%, was 3.4%	down 0.3 pts	1,213 / 1,218
R10 Next step	●3.0%, was 3.2%	down 0.2 pts	1,104 / 1,108
R08 Stops after a no	●2.5%, was 3.4%	down 0.9 pts	201 / 204
R05 No promises	●1.7%, was 1.3%	Rule changed Sep 14, not compared	1,105 / 1,108
R01 Recording notice	●0.7%, was 1.0%	down 0.3 pts	1,213 / 1,218
0% 5% 10% 15% 20%			

RULE CHANGED

On Sep 14, R05 became critical and now also covers insurance promises (scorecard 2026-09-14.2). August and September R05 rates measure different rules, so no change is shown.

Same campaign and teams, calendar month against calendar month. Review scope changed by under 5% of reviewed calls (page 2). 410 findings on 304 calls: one call can carry several findings. 414 findings originally, 4 overturned after dispute; rates use the final marks.

CRITICAL-FAILURE RATE

2.1% (26 of 1,213) against 1.6% (19 of 1,218) in August, up 0.5 pts. Counting only the requirements that were critical in August (R01, R08), September is 1.2% (14 of 1,213).

4 • TREND AND CONTEXT

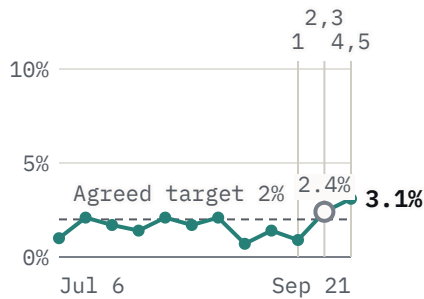
Twelve weeks of the rates that matter most.

Transfer failures stepped down after the Sep 8 script change.

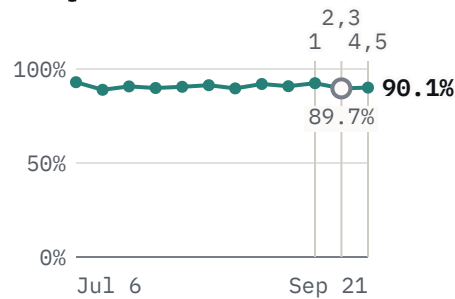
Critical failures rose when the rule widened on Sep 14.

Weekly, Jul 6 to Sep 27, 2026 (Monday weeks; Sep 28 to 30 is not yet a full week). Ring: the week before.

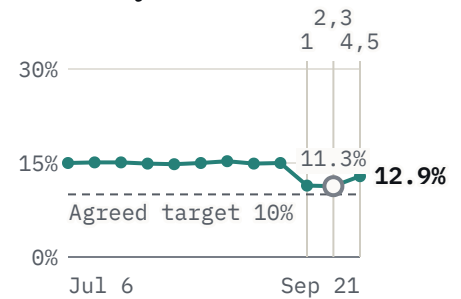
Critical-failure rate



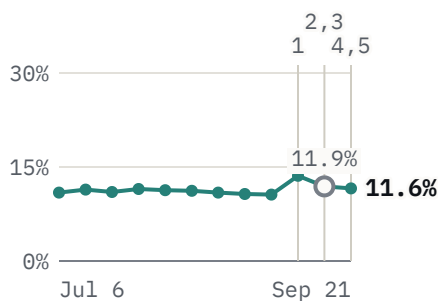
Call pass rate



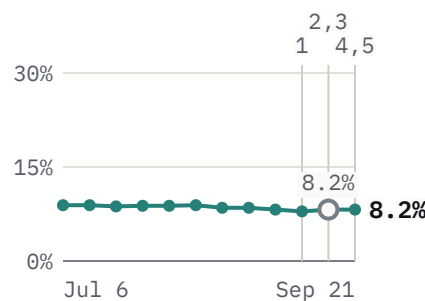
R06 Clear yes



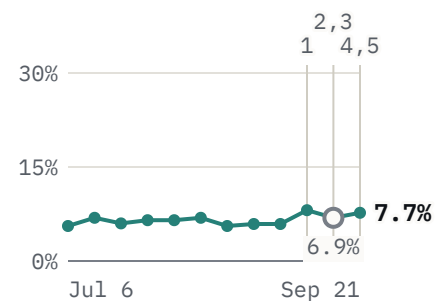
R04 Price answered



R07 Handoff



R09 Time confirmed



1 Sep 8: Transfer script changed (confirmed by your team)

2 Sep 14: Scorecard 2026-09-14.2: R05 now critical, insurance promises added

3 Sep 16: Saturday shift added to review scope

4 Sep 21: New agent started on Team North

5 Sep 25: Coaching on R09 (one agent, Team North)

What the evidence shows

- **Transfers (R06).** Between 14.8% and 15.3% every week from Jul 6 to Aug 31, then 11.4% and 11.3% in the two weeks after the script change. 12.9% in the week of Sep 21, when a new agent started.
- **Critical failures.** R05 findings, critical from Sep 14, were 5 of 8 critical findings in the week of Sep 14 and 5 of 9 in the week of Sep 21.
- **Call pass rate.** Between 88.9% and 93.0% in every week. No sustained movement.

What we do not know

- We do not know whether the script change caused the drop in R06 failures. The timing matches, and no other recorded event falls in that week.
- Whether the Sep 21 rise is the new agent's first week or a wider change. One week is too short to tell.
- Why price answers (R04) rose to 13.6% in the week of Sep 7, from between 10.6% and 11.3% in the five weeks before. We have no confirmed event that explains it.

RESTATED SINCE THE SEP 28 WEEKLY REPORT

Week of Sep 14 R06 reads 11.3% (24 of 212) here; the Sep 28 weekly report showed 11.4% (24 of 211) before 1 not-evaluated mark was scored after a second review on Sep 29.

Week of Sep 21 R06 reads 12.9% (27 of 209) here; the Sep 28 weekly report showed 13.4% (28 of 209) before 1 finding was overturned on Sep 29.

5 • UNRESOLVED FINDINGS

What is still open, and who closes it.

31 items open from September; 4 overdue against agreed standards.

Days since the finding appeared, as of Fri, Oct 2. Critical solid, standard outlined. Disputed items included; never overdue while we decide.

0 to 2 days		20 open: 1 critical, 19 standard	
Critical due in 2 business days			
3 to 7 days		8 open: 1 critical, 7 standard	1 overdue
Standard due in 5 business days			
8 to 14 days		2 open: 0 critical, 2 standard	2 overdue
15 days or more		1 open: 0 critical, 1 standard	1 overdue

OPEN	29	DISPUTED	2	RESOLVED	390
23 failed findings (1 critical) and 6 not evaluated, waiting for supervisor follow-up. 4 past their agreed due date.		With Ad Nomina for a decision by Oct 5 and Oct 6; counted until decided. September: 8 raised, 4 overturned, 2 upheld, 2 open.		Closed by Oct 2: 217 coached, 168 acknowledged by the supervisor, 4 overturned after dispute, 1 reviewed again and scored. Resolved findings still count in the rates.	

Critical, disputed and overdue items

SEVERITY	CALL	REQUIREMENT	STATUS	OWNER	DUE	NEXT STEP
CRITICAL	HP-20428 Sep 24, Team North	R01 Recording disclosure	OPEN 3 DAYS OVERDUE	Team North lead	Sep 29	Follow up, then close
CRITICAL	HP-20626 Sep 29, Team South	R05 No savings, approval or insurance promises	DISPUTED	Ad Nomina	Decision Oct 5	We decide, then the supervisor follows up
FAIL	HP-20051 Sep 15, Team North	R09 Appointment time confirmed	OPEN 9 DAYS OVERDUE	Team North lead	Sep 23	Follow up, then close
FAIL	HP-20116 Sep 17, Team North	R03 Offer stated correctly	OPEN 7 DAYS OVERDUE	Team North lead	Sep 25	Follow up, then close
FAIL	HP-20300 Sep 22, Team South	R03 Offer stated correctly	OPEN 2 DAYS OVERDUE	Team South lead	Sep 30	Follow up, then close
FAIL	HP-20616 Sep 29, Team South	R06 Clear yes before transfer	DISPUTED	Ad Nomina	Decision Oct 6	We decide, then the supervisor follows up

Critical first, then standard; within each, overdue first, then oldest. The other 25 open items are within their agreed due dates (Oct 2 to Oct 8) and are in the review queue. Overdue is measured only against the agreed service standards: critical 2 business days, standard 5, dispute decision 3.

6 • METHODOLOGY

How every number in this report is counted.

What this report is

A summary of our reviews of Northgate Home Services's recorded calls for September 2026. It reports what the reviews found. It is not a sign-off on campaign compliance and it is not legal advice. It is a download from your signed-in dashboard and names no agents.

Period, scope and time

Calls dated Sep 1 to Sep 30, 2026, in Eastern time, campaign Home services, outbound, all teams. Data as of Fri, Oct 2, 7:00 am ET. Calls through Thu, Oct 1. Figures are fixed at that time; later corrections appear in the next report.

Received, selected and eligible

Received: recordings that reached us with a call date in the period. Not selected: outside the agreed review scope. Excluded: selected calls under 30 seconds. Eligible: selected calls that are not excluded. Each received call sits in exactly one of reviewed, pending, could not be processed, excluded or not selected.

Review coverage

Reviewed calls over eligible calls. Calls that could not be processed stay in the denominator.

Requirement marks

Each requirement on each reviewed call is passed, failed, not applicable (the situation did not arise) or not evaluated (we could not decide, for example when the recording drops out). Fixed rules score R01 and R02; automated review scores the rest, and a reviewer decides every dispute.

Requirement failure rate

Failed over passed plus failed, for calls where the requirement applied and was evaluated. Not applicable and not evaluated marks are reported beside the rate, never inside it. Affected calls count each call once.

Call score and average score

Call score: passed over evaluated requirements on the call, whole percent. Average score: the mean of call scores, each call counted once (95% in September 2026). A critical failure counts as one failed requirement in the call's score. It also fails the call outright and is reported on its own as the critical-failure rate.

Pass rate

A call passes when its score is 80% or higher and it has no critical failure. Pass rate is passed calls over reviewed calls: 90.8% (1,101 of 1,213).

Critical-failure rate

Reviewed calls with at least one critical requirement failed, over reviewed calls. Each call is scored under the scorecard in force on its call date: R01 and R08 are critical all month; R05 is critical from Sep 14 (scorecard 2026-09-14.2).

Disputes and corrections

A supervisor can dispute any finding. It stays counted, marked disputed, until we decide (within 3 business days). Upheld: the finding stands. Overturned: the mark changes. Totals use the final mark and state the original count and the number overturned.

Open, overdue and resolved

An item is open until a supervisor records its follow-up. Overdue means past the agreed service standard: critical 2 business days, standard 5. While a dispute is open the clock stops, and restarts at our decision. Resolving an item does not remove the original finding from the rates.

Comparisons

Against the previous equal period, here August 2026, for the same campaign and teams. Changes are in percentage points, from the displayed values. A requirement whose rule changed is shown but not compared. A scope change of 5% or more of reviewed calls is flagged.

Small samples and targets

Under 10 evaluated calls we show counts only, with no rate, color or rank. Targets are operational targets agreed with Northgate Home Services: R06 under 10% and critical-failure rate under 2%.

Rounding

Rates to one decimal place, half up. Scores to whole percent. Counts are exact.