

Week of Sep 21 to 27, 2026 · Northgate Home Services, Home services, outbound · All teams · Eastern time · Data as of Mon, Sep 28, 7:00 am ET · Scorecard 2026-09-14.2 · Compared with Sep 14 to 20

1 EXECUTIVE OVERVIEW

Transfers without a clear yes rose to 13.4%. Three agents account for 19 of the 28.

R06 Clear yes before transfer: 13.4% (28 of 209) evaluated calls failed, up 2.0 pts from 11.4% (24 of 211) the week before. Nina B. 7, Leo M. 6 and Evan P. 6 (Leo M. started Sep 21).

REVIEW COVERAGE 100.0% 293 of 293 eligible calls 300 received, 7 under 30 seconds	CRITICAL-FAILURE RATE 3.1% 9 of 293 reviewed calls up 0.7 pts from 2.4% (7 of 292)	OPEN CRITICAL FINDINGS 2 1 disputed, 0 overdue HP-20418 R08: decision due Wed, Sep 30; HP-20428 R01: due Tue, Sep 29
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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. 5 of this week's 9 are R05 (No promises), critical since Sep 14.

Recommended priorities

- 1

Coach the transfer question.
R06 Clear yes before transfer: Evan P. 26.1% (6 of 23);
Nina B. 28.0% (7 of 25)

RECOMMENDED

 Proposed owner Marcus H., by Fri, Oct 2
- 2

Pair Leo M. with a senior agent for transfers.
R06 Clear yes before transfer: Leo M. 35.3% (6 of 17)
R07 Handoff gives name and reason: Leo M. 11.8% (2 of 17)

RECOMMENDED

 Proposed owner Dana W., by Fri, Oct 9
- 3

Brief all agents on the approved price line.
R04 Price answered plainly: 11.6% (16 of 138), all agents

RECOMMENDED

 Proposed owner Alex P., by Fri, Oct 16

Recommendations until an owner accepts them. Details in section 5.

This week in numbers

AVERAGE SCORE	95% last week 95%
CALL PASS RATE	90.1% (264 of 293) last week 89.7% (262 of 292)
FINDINGS	103 findings on 78 calls 104 originally, 1 overturned after dispute

Comparison: Sep 14 to 20, an equal Monday to Sunday week on the same scorecard (2026-09-14.2). Leo M. started Sep 21, so he has no calls in the comparison week. Totals include findings corrected after review. Disputed findings stay counted until we decide.

2 COACHING HEATMAP

R06 failures concentrate in Team South and in Leo M.'s first week.

Failure rate on evaluated calls, Sep 21 to 27, 2026. Each cell shows the rate, then failed / evaluated calls. Agents are grouped by team and ordered by calls reviewed, never by performance. Columns marked ! are critical requirements.

	R01 ! Recording notice	R02 Name and company	R03 Offer stated	R04 Price answered	R05 ! No promises	R06 Clear yes	R07 Handoff	R08 ! Stops after a no	R09 Time confirmed step	R10 Next step
Maya R. 41 calls	0.0% 0/41	0.0% 0/41	5.1% 2/39	0.0% 0/21	2.6% 1/39	3.1% 1/32	3.3% 1/30	0 of 6 too few	0 of 8 too few	0.0% 0/39
Daniel K. 38 calls	2.6% 1/38	2.6% 1/38	0.0% 0/34	0.0% 0/14	0.0% 0/34	7.1% 2/28	3.8% 1/26	0 of 9 too few	0 of 8 too few	2.9% 1/34
Priya S. 38 calls	0.0% 0/38	7.9% 3/38	0.0% 0/35	10.5% 2/19	2.9% 1/35	3.7% 1/27	11.1% 3/27	1 of 6 too few	0 of 8 too few	0.0% 0/35
Tomas L. 37 calls	0.0% 0/37	5.4% 2/37	3.1% 1/32	20.0% 3/15	3.1% 1/32	8.0% 2/25	9.1% 2/22	0 of 6 too few	15.4% 2/13	6.3% 2/32
Leo M. 26 calls	3.8% 1/26	0.0% 0/26	4.0% 1/25	36.4% 4/11	0.0% 0/25	35.3% 6/17	11.8% 2/17	0 of 6 too few	1 of 7 too few	8.0% 2/25
Team North 180 calls	1.1% 2/180	3.3% 6/180	2.4% 4/165	11.3% 9/80	1.8% 3/165	9.3% 12/129	7.4% 9/122	3.0% 1/33	6.8% 3/44	3.0% 5/165
Grace O. 40 calls	0.0% 0/40	2.5% 1/40	0.0% 0/39	5.3% 1/19	0.0% 0/39	10.3% 3/29	7.7% 2/26	0 of 9 too few	7.1% 1/14	0.0% 0/39
Evan P. 34 calls	0.0% 0/34	2.9% 1/34	3.3% 1/30	5.9% 1/17	3.3% 1/30	26.1% 6/23	14.3% 3/21	0 of 5 too few	0 of 7 too few	6.7% 2/30
Nina B. 34 calls	0.0% 0/34	5.9% 2/34	16.7% 5/30	27.8% 5/18	3.2% 1/31	28.0% 7/25	8.7% 2/23	1 of 9 too few	18.2% 2/11	3.2% 1/31
Ruth A. 5 calls	0 of 5 too few	0 of 5 too few	0 of 5 too few	0 of 4 too few	0 of 5 too few	0 of 3 too few	0 of 3 too few	0 of 2 too few	0 of 2 too few	0 of 5 too few
Team South 113 calls	0.0% 0/113	3.5% 4/113	5.8% 6/104	12.1% 7/58	1.9% 2/105	20.0% 16/80	9.6% 7/73	4.0% 1/25	8.8% 3/34	2.9% 3/105
All teams 293 calls	0.7% 2/293	3.4% 10/293	3.7% 10/269	11.6% 16/138	1.9% 5/270	13.4% 28/209	8.2% 16/195	3.4% 2/58	7.7% 6/78	3.0% 8/270

0.0% above 0 to under 5% 5% to under 10% 10% to under 25% 25% and over

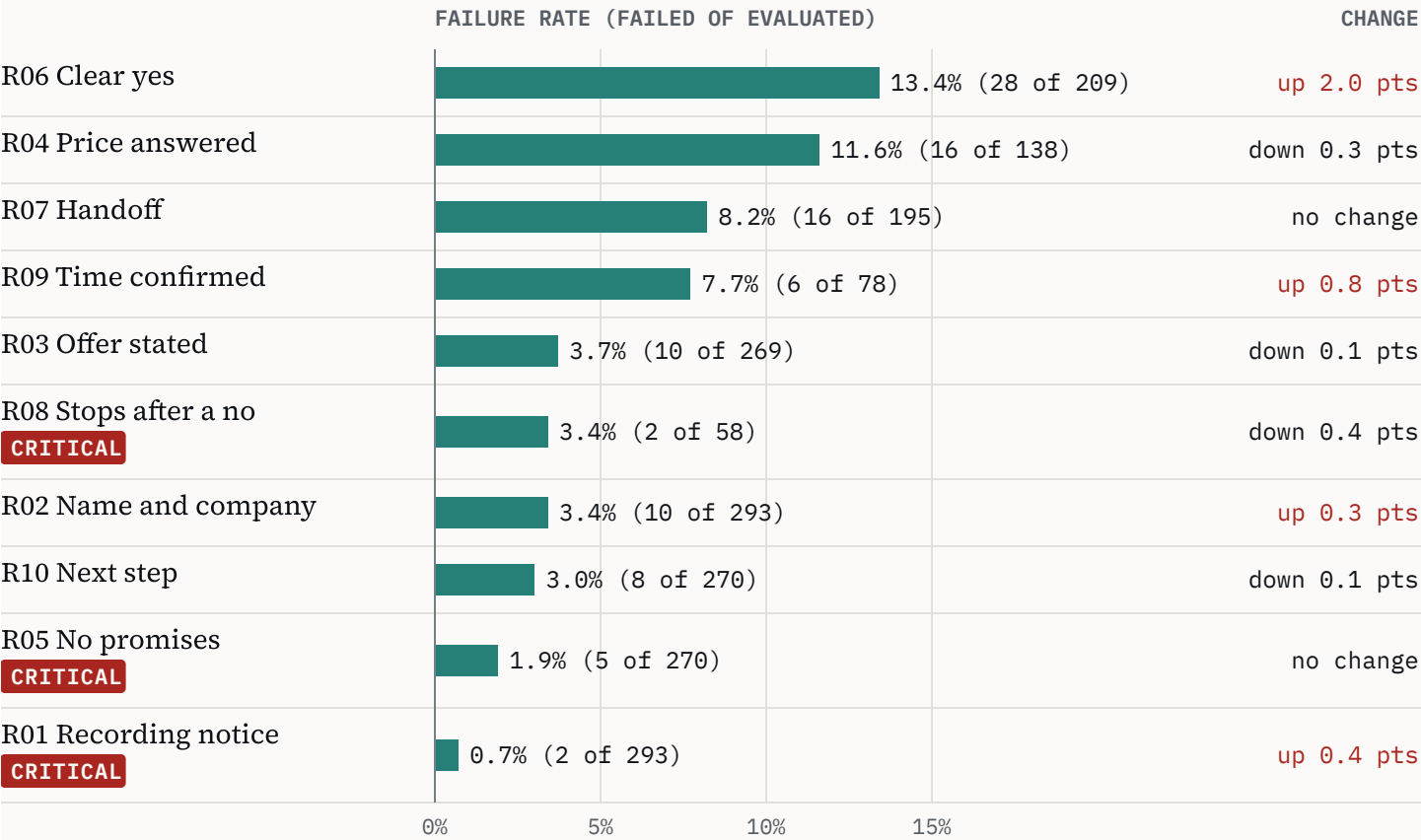
Under 10 evaluated: counts only

Hatched cells have under 10 evaluated calls: counts only, no rate or color, and no ranking. Ruth A. has 5 reviewed calls this week, so every cell of that row is hatched. R08 (Stops after a no) applies on few calls, so its rates are read at team level.

3 RECURRING ISSUES

Clear yes before transfer is the most common failure, and it rose 2.0 pts.

Sep 21 to 27, 2026. Ranked by failure rate on evaluated calls, high to low. In brackets: affected calls of evaluated calls; each call counts once per requirement. Change from Sep 14 to 20 in percentage points.



103 findings on 78 calls this week (one call can fail several requirements). 104 originally; 1 overturned after dispute.

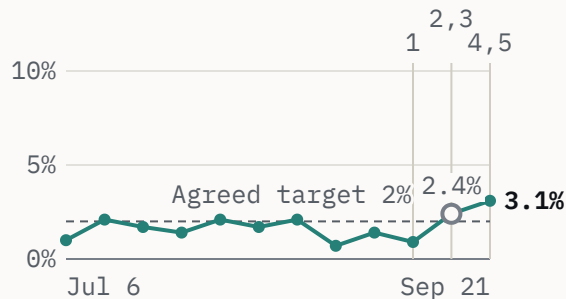
REQUIREMENT	AFFECTED CALLS	PASSED	NOT EVALUATED	NOT APPLICABLE	LAST WEEK
R06 Clear yes	28	181	1	83	11.4% (24 of 211)
R04 Price answered	16	122	0	155	11.9% (18 of 151)
R07 Handoff	16	179	0	98	8.2% (16 of 195)
R09 Time confirmed	6	72	0	215	6.9% (5 of 72)
R03 Offer stated	10	259	1	23	3.8% (10 of 262)
R08 Stops after a no	2	56	0	235	3.8% (2 of 52)
R02 Name and company	10	283	0	0	3.1% (9 of 292)
R10 Next step	8	262	0	23	3.1% (8 of 262)
R05 No promises	5	265	0	23	1.9% (5 of 262)
R01 Recording notice	2	291	0	0	0.3% (1 of 292)

4 TRENDS

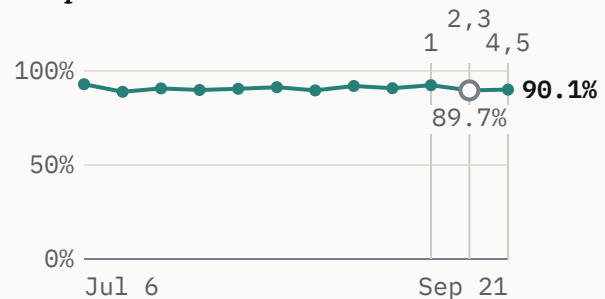
R06 stepped down after Sep 8 and rose in the latest week.

Weekly, Jul 6 to Sep 27, 2026 (12 weeks). Axes start at zero. Ring: the week before. Dashed line: agreed target. Numbered rules mark dated events; they do not show a cause.

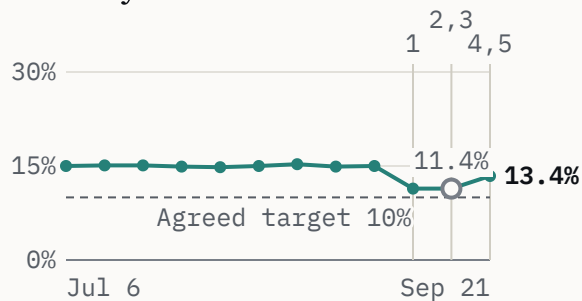
Critical-failure rate



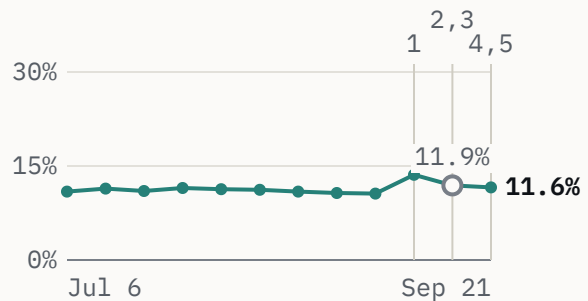
Call pass rate



R06 Clear yes



R04 Price answered



1 Sep 8: Transfer script now asks: Would you like me to connect you with a specialist now?

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

3 Sep 16: Ruth A. (Saturday shift) added to review scope

4 Sep 21: Leo M. started

5 Sep 25: Tomas L. coached on R09

The critical-failure rate counts R05 from Sep 14 (event 2). The week of Sep 7 had 223 reviewed calls (Labor Day).

WEEK OF	CRITICAL-FAILURE RATE	CALL PASS RATE	R06 CLEAR YES	R04 PRICE ANSWERED
Jul 6	1.0% (3 of 286)	93.0% (266 of 286)	15.0% (31 of 207)	10.9% (15 of 137)
Jul 13	2.1% (6 of 287)	88.9% (255 of 287)	15.1% (32 of 212)	11.4% (16 of 140)
Jul 20	1.7% (5 of 291)	90.7% (264 of 291)	15.1% (32 of 212)	11.0% (17 of 154)
Jul 27	1.4% (4 of 287)	89.9% (258 of 287)	14.9% (30 of 202)	11.5% (15 of 131)
Aug 3	2.1% (6 of 283)	90.5% (256 of 283)	14.8% (32 of 216)	11.3% (17 of 150)
Aug 10	1.7% (5 of 290)	91.4% (265 of 290)	15.0% (31 of 206)	11.2% (17 of 152)
Aug 17	2.1% (6 of 290)	89.7% (260 of 290)	15.3% (31 of 203)	10.9% (15 of 138)
Aug 24	0.7% (2 of 289)	92.0% (266 of 289)	14.9% (31 of 208)	10.7% (13 of 121)
Aug 31	1.4% (4 of 287)	90.9% (261 of 287)	15.0% (31 of 206)	10.6% (15 of 142)
Sep 7	0.9% (2 of 223)	92.4% (206 of 223)	11.4% (18 of 158)	13.6% (15 of 110)
Sep 14	2.4% (7 of 292)	89.7% (262 of 292)	11.4% (24 of 211)	11.9% (18 of 151)
Sep 21	3.1% (9 of 293)	90.1% (264 of 293)	13.4% (28 of 209)	11.6% (16 of 138)

5 COACHING ACTIONS

3 recommendations are waiting for an owner to accept them.

As of Mon, Sep 28, 7:00 am ET. A recommendation stays a recommendation until its owner accepts it; owners and dates marked proposed are suggestions. The follow-up measure is the requirement's failure rate for the named agents in the 2 weeks after the action is done.

FINDING	AGENT OR TEAM	SUPPORTING CALLS	PROPOSED ACTION	OWNER	TARGET DATE	STATUS	FOLLOW-UP MEASURE
1 R06 Clear yes before transfer: Evan P. 26.1% (6 of 23); Nina B. 28.0% (7 of 25)	Evan P. and Nina B.	HP-20240 HP-20266 HP-20273	Coach the transfer question: ask "Would you like me to connect you with a specialist now?" and wait for a clear yes.	Marcus H. PROPOSED	Fri, Oct 2 PROPOSED	RECOMMENDED Not yet accepted	R06 failure rate, Evan P. and Nina B., in the 2 weeks after it is done
2 R06 Clear yes before transfer: Leo M. 35.3% (6 of 17) R07 Handoff gives name and reason: Leo M. 11.8% (2 of 17)	Leo M.	HP-20254 HP-20282 HP-20285	Pair Leo M. with a senior agent for transfers: the clear-yes question and the handoff line.	Dana W. PROPOSED	Fri, Oct 9 PROPOSED	RECOMMENDED Not yet accepted	R06 and R07 failure rate, Leo M., in the 2 weeks after it is done
3 R04 Price answered plainly: 11.6% (16 of 138), all agents	All agents	HP-20237 HP-20247 HP-20276	Brief all agents on the approved price line: the inspection is free, and the repair quote comes after the report.	Alex P. PROPOSED	Fri, Oct 16 PROPOSED	RECOMMENDED Not yet accepted	R04 failure rate, all agents, in the 2 weeks after it is done
4 R05 No savings, approval or insurance promises: 1.9% (5 of 270), both teams	Both teams	HP-19934 HP-19957 HP-19992	Brief both teams on the new rule: no savings, approval or insurance promises.	Alex P.	Wed, Sep 30	ACCEPTED Mon, Sep 21	R05 failure rate, both teams, in the 2 weeks after it is done
5 R09 Appointment time confirmed: Tomas L. 15.4% (2 of 13)	Tomas L.	HP-19707 HP-20051 HP-20147	Practice reading back the appointment day and time.	Dana W.	Fri, Sep 25	DONE Fri, Sep 25	0 of 3, too few calls to judge

How we count

Received calls reached us with a call date in the week. **Selected** calls are inside the agreed review scope. **Excluded** calls are under 30 seconds. **Pending** calls are not yet reviewed. **Reviewed** calls were scored against the scorecard. **Call score:** passed of evaluated requirements on the call. 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. **Average score:** the mean call score; each call counts once. **Pass rate:** reviewed calls scoring 80% or more with no critical failure. **Critical-failure rate:** reviewed calls with any critical requirement failed.

Requirement failure rate: failed of evaluated calls where the requirement applied; not applicable and not evaluated are counted apart. Rates need 10 evaluated calls; below that we show counts only. Disputed findings stay counted until we decide; overturned findings leave the totals and are reported beside them. Changes are in percentage points. Agreed targets are operational targets agreed with you. All times Eastern.

6 EVIDENCE APPENDIX

One representative call per priority, and the open critical finding.

Short excerpts from failed and disputed findings only. Each call reference opens the full call review in your dashboard, where your usual sign-in and permissions apply.

[Call HP-20240](#) Mon, Sep 21, 9:50 am ET · Nina B., Team South · 3:13 long

SUPPORTS ACTION 1

FAIL **R06 Clear yes before transfer** at 2:45

AGENT AT 2:45

"Okay, I'll put you through to the specialist now."

WHY

Transferred without asking and hearing a clear yes.

Automated review

[Call HP-20282](#) Mon, Sep 21, 4:51 pm ET · Leo M., Team North · 3:40 long

SUPPORTS ACTION 2

FAIL **R06 Clear yes before transfer** at 3:05

AGENT AT 3:05

"Okay, I'll put you through to the specialist now."

WHY

Transferred without asking and hearing a clear yes.

Automated review

FAIL **R07 Handoff gives name and reason** at 3:22

AGENT AT 3:22

"I've got a homeowner for you, go ahead."

WHY

The specialist was not told the customer's first name and the reason for the call.

Automated review

[Call HP-20237](#) Mon, Sep 21, 9:20 am ET · Nina B., Team South · 2:42 long

SUPPORTS ACTION 3

FAIL **R04 Price answered plainly** at 1:16

CUSTOMER AT 1:16

"How much is all this going to cost?"

AGENT AT 1:19

"It really depends, the specialist will go over all of that."

WHY

The cost question was not answered with the approved price line.

Automated review

[Call HP-20418](#) Thu, Sep 24, 10:15 am ET · Nina B., Team South · 2:31 long

OPEN CRITICAL FINDING, DISPUTED

CRITICAL **DISPUTED** **R08 Stops after a no** at 1:37

CUSTOMER AT 1:37

"I'm really not interested."

AGENT AT 1:40

"I understand, but it only takes a minute to hear the details."

WHY

The customer declined and the agent kept pitching.

Automated review

Disputed by Marcus H., Fri, Sep 25. Our decision due Wed, Sep 30. The finding stays counted until then.

FAIL **DISPUTED** **R06 Clear yes before transfer** at 2:11

AGENT AT 2:11

"Okay, I will put you through to the specialist now."

WHY

Transferred without asking and hearing a clear yes.

Automated review

Disputed by Marcus H., Fri, Sep 25. Our decision due Wed, Sep 30. The finding stays counted until then.