

METHODOLOGY



escda.ca/en

METHODOLOGY FOR VOTED CUSTOMER SERVICE OF THE YEAR 2027

The award Voted Customer Service of the Year is based on the principle of a mystery shopper, meaning a consumer who anonymously contacts the Participants (the "**Mystery Shopper**"). Their mission is to assess how a Participant handles various issues presented to them and, consequently, to evaluate the quality of the service provided by this Participant to consumers (the "**Tests**").

The results of the Tests for a Customer Service offered by the Participant, in a given Category, leads to the creation of a study report (the "**Study Report**") and the designation of the Winner (the "Winner") by the Mystery Shoppers and the Organizer (the "**Jury**").

The process of selecting the Winners is based on factual measurements detailed in Article 4 and the Annexes below.

The Mystery Shopper assesses the accuracy of the information provided through three (3) ratings, reflecting how well the Participants handle both common and specific issues:

- Good (2 point): the expected information is provided and matches the source data.
- Partial (1 point): Only part of the expected information is provided, or too much information is given.
- Incorrect and/or missing (0 point): All provided information does not match the expected details, or no information is provided when it was expected.

The "Response Quality" criterion, defined in the Annexes below, will have a multiplier coefficient of two.

Its scoring will therefore be:

- Good (4 points): The expected information is provided and matches the source data.
- Partial (2 points): Only part of the expected information is provided, or too much information is given.
- Incorrect and/or missing (0 point): All provided information does not match the expected details, or no information is provided when it was expected.

If a criterion defined in Article 4 and the Annexes below receives two different ratings (e.g., Partial and Incorrect), the lower rating will be retained (thus, Incorrect).

To ensure credibility in carrying out their mission, Mystery Shoppers may (i) use the Participant's Customer Service under a fictitious issue requiring normal or usual processing, and (ii) use the Participant's Customer Service under a fictitious issue requiring specific processing.

Once the specific processing reaches the stage of a physical or material intervention, and the necessary response for resolving the fictitious issue has been given, the Mystery Shopper may then clarify their conditions of intervention to terminate the specific processing.

1. Characteristics of Mystery Shoppers

The Tests are conducted by consumers who may or may not have specific qualifications related to the Category in which they act as Mystery Shoppers.

Mystery Shoppers are selected and recruited by the Organizer and its technical service providers, who may call upon users and employees registered in their respective panels, as well as consumers who may be listed in the databases made available for the Event.

2. Script Creation

The execution of the Tests by the Mystery Shoppers follows the instructions contained in the scripts prepared by the Organizer (the "**Scripts**") and provided to the Mystery Shoppers prior to conducting the Tests.

The Scripts will be developed by the Organizer based on the contractual documents provided to consumers and/or prospects by the Participants, current advertisements, commonly observed simple malfunctions, and typical pre-sales, sales, and post-sales issues (for example, but not limited to, product availability, technical specifications, and distribution network).

Each Participant will be tested by Mystery Shoppers using between thirteen and twenty different Scripts.

3. Protocol

Each Participant undergoes 175 Tests, structured as follows:

- 100 phone calls.
- 40 emails or online forms.
- 15 website navigations, including 7 on a smartphone (4 of these smartphone navigations will be conducted via the Participant's mobile application).
- 10 interactions via social media.
- 10 chat conversations.

The order of the Tests and the Participants tested is randomized for each Category.

The usage details of a Participant's Customer Service, including phone numbers, email addresses, website addresses, dedicated social media pages or sections, and web pages allowing chat interactions, as well as business hours and days of operation, will be those that are clearly listed and easily identifiable in the Participant's communication and sales materials (such as advertisements, brochures, leaflets, sales contracts, purchase orders, packaging, and websites).

If a Participant uses only two, three, or four of the five communication channels, including phone and website navigation, only the managed communication channels will be evaluated.

If a Participant dedicates a communication channel to a specific type of interaction, such as pre-sales or after-sales, only the communication channels offered for pre-sales and after-sales will be evaluated.

In such cases, the Tests will focus on the two, three, or four communication channels used, while the number of Tests per channel will remain unchanged.

4. Test Execution

All Tests will be conducted during the third quarter of 2025, specifically between July and September.

4.a. Phone Calls

The Tests conducted through phone calls will be carried out based on the distribution of peak call times generally observed in the Participant's registration Category and will necessarily take place during the operating days and hours of each Participant's Customer Service. Tests conducted during exceptional closures for service-related reasons will still be taken into account.

Each Participant is evaluated based on 15 criteria described in Annex 3.

Each call is assessed on 10 to 15 criteria, depending on how it is handled, and is assigned a score on a scale of 0 to 32, based on the number of criteria evaluated. This score is then converted to a scale of 0 to 20, with rounding applied to the nearest hundredth (where 5 rounds up to the next hundredth).

The final score for the phone call Tests of the tested Participant's Customer Service is calculated as follows:

- Sum of the 100 obtained scores / 100 (with rounding to the nearest hundredth, where 5 rounds up to the next hundredth).

All calls made as part of the Tests are taken into account.

4.b. Emails or Forms

Tests conducted through the sending of emails and/or forms will adhere to the distribution of received emails or forms generally observed within the Participant's Registration Category.

Each Participant is evaluated based on 14 criteria described in Annex 4.

Each email is assessed according to 13 to 14 criteria, depending on how it is processed, and is assigned a score on a scale of 0 to 30 based on the number of criteria evaluated. This score is then converted to a scale of 0 to 20 (rounded to the nearest hundredth, with 5 rounding up to the next hundredth).

The final score for the Customer Service Tests conducted via email or form for the tested Participant is calculated as follows:

- Sum of the 40 final scores obtained / 40 (rounded to the nearest hundredth, with 5 rounding up to the next hundredth).

All emails sent and forms submitted as part of the Tests are taken into account.

4.c. Internet Navigation

Tests conducted through Internet navigation will be carried out exclusively on the Participant's dedicated web pages and mobile applications.

Each Participant is evaluated on the navigation of their website based on 13 criteria described in Annex 5.

Each Internet navigation session is assessed according to 10 to 13 criteria, depending on how it is processed, and is assigned a score on a scale of 0 to 28 based on the number of criteria evaluated. This score is then converted to a scale of 0 to 20 (rounded to the nearest hundredth, with 5 rounding up to the next hundredth).

The final score for the Customer Service Tests conducted via Internet navigation for the tested Participant is calculated as follows:

- Sum of the 15 final scores obtained / 15 (rounded to the nearest hundredth, with 5 rounding up to the next hundredth).

Toutes les navigations Internet dans le cadre des Tests sont prises en compte.

4.d. Social Media

Tests conducted through the posting of messages on social media will be carried out exclusively on the Participant's dedicated Facebook pages.

Each Participant is evaluated based on 15 criteria described in Annex 6.

Each social media post is assessed according to 11 to 15 criteria, depending on how it is processed, and is assigned a score on a scale of 0 to 32 based on the number of criteria evaluated. This score is then converted to a scale of 0 to 20 (rounded to the nearest hundredth, with 5 rounding up to the next hundredth).

The final score for the Customer Service Tests conducted via social media for the tested Participant is calculated as follows:

- Sum of the 10 final scores obtained / 10 (rounded to the nearest hundredth, with 5 rounding up to the next hundredth).

All messages posted on social media as part of the Tests are taken into account.

4.e. Chat

Tests conducted through chat conversations will be carried out exclusively on the Participant's web pages that provide access to this service.

Each Participant is evaluated based on 14 criteria described in Annex 7.

Each chat conversation is assessed according to 12 to 14 criteria, depending on how it is processed, and is assigned a score on a scale of 0 to 30 based on the number of criteria evaluated. This score is then converted to a scale of 0 to 20 (rounded to the nearest hundredth, with 5 rounding up to the next hundredth).

The final score for the Customer Service Tests conducted via chat for the tested Participant is calculated as follows:

- Sum of the 10 final scores obtained / 10 (rounded to the nearest hundredth, with 5 rounding up to the next hundredth).

All chat conversations conducted as part of the Tests are taken into account.

5. Designation of Winners

The Winners are designated by Category.

The consolidated final score, used to differentiate Participants, is calculated as follows:

Score from Telephone Call Tests × weighting coefficient (0.57)
Score from Email or Form Tests × weighting coefficient (0.23)
Score from Internet Navigation Tests × weighting coefficient (0.08)
Score from Social Media Post Tests × weighting coefficient (0.06)
Score from Chat Tests × weighting coefficient (0.06).

If the tested communication channels are telephone, email or form, Internet navigation, and social media, the consolidated final score, used to differentiate Participants, is calculated as follows:

(Score from Telephone Call Tests × weighting coefficient (0.6)
Score from Email or Form Tests × weighting coefficient (0.24)
Score from Internet Navigation Tests × weighting coefficient (0.09)
Score from Social Media Post Tests × weighting coefficient (0.07)) × 0.98.

If the tested communication channels are telephone, email or form, Internet navigation, and chat, the consolidated final score, used to differentiate Participants, is calculated as follows:

(Score from Telephone Call Tests × weighting coefficient (0.6)
Score from Email or Form Tests × weighting coefficient (0.24)
Score from Internet Navigation Tests × weighting coefficient (0.09)
Score from Chat Tests × weighting coefficient (0.07)) × 0.98.

If the tested communication channels are telephone, email or form, and Internet navigation, the consolidated final score, used to differentiate Participants, is calculated as follows:

(Score from Telephone Call Tests × weighting coefficient (0.63)
Score from Email or Contact Form Tests × weighting coefficient (0.27)
Score from Internet Navigation Tests × weighting coefficient (0.1)) × 0.95.

If the tested communication channels are telephone, Internet navigation, social media, and chat, the consolidated final score, used to differentiate Participants, is calculated as follows:

(Score from Telephone Call Tests × weighting coefficient (0.70)
Score from Internet Navigation Tests × weighting coefficient (0.14)
Score from Social Media Post Tests × weighting coefficient (0.08)
Score from Chat Tests × weighting coefficient (0.08)) × 0.90.

If the tested communication channels are telephone, Internet navigation, and chat, the consolidated final score, used to differentiate Participants, is calculated as follows:

(Score from Telephone Call Tests × weighting coefficient (0.75)
Score from Internet Navigation Tests × weighting coefficient (0.15)
Score from Chat Tests × weighting coefficient (0.1)) × 0.85.

If the tested communication channels are telephone, Internet navigation, and social media, the consolidated final score, used to differentiate Participants, is calculated as follows:

(Score from Telephone Call Tests × weighting coefficient (0.75)
Score from Internet Navigation Tests × weighting coefficient (0.15)
Score from Social Media Post Tests × weighting coefficient (0.1)) × 0.85.

If the tested communication channels are telephone and Internet navigation, the consolidated final score, used to differentiate Participants, is calculated as follows:

(Score from Telephone Call Tests × weighting coefficient (0.8)
Score from Internet Navigation Tests × weighting coefficient (0.2)) × 0.80.

The Winner of each Category is the Participant within their Category who obtains the highest consolidated final score, provided that this score is greater than or equal to 11.5 out of 20.

6. Study Report

Each Participant will receive:

- The detailed results of their Customer Service performance, broken down by communication channel and criterion.
- A comparative analysis of the results within their Category or Categories.

Upon simple request, the Organizer will provide an example of a Study Report.

The results are presented anonymously, except for the name of the concerned Participant.

Given the sample selected for the Tests and the Test methodology, the Organizer does not perform any sorting or additional analyses beyond those included in the Study Report.

The Study Report is presented in French and English, during a single debriefing session, either face-to-face or remotely, depending on the availability of the Participant and the Organizer.

This debriefing session will take place between Monday, October 4th, and Friday, November 6th, 2026. Any additional debriefing sessions will require a quotation, which must be approved by the Participant beforehand.

7. Various

The Organizer reserves the right to entrust the execution of the Tests, including the selection of Mystery Shoppers, to service providers of its choice.

Contact

ÉLECTION DU SERVICE À LA CLIENTÈLE DE L'ANNÉE

ESCDA CANADA

105-1203, avenue Bernard,

Montréal, QC, H2V 1V7

+1(514) 690-3652

info@escda.ca

escda.ca/en



ANNEX 3 - EVALUATION CRITERIA TELEPHONE

The following types of calls will give rise to an overall rating of "Poor" or "Non-Existent":

- Calls not picked up following a ringing time of more than 60 seconds.
- Calls that last (as defined below) for four or more minutes from the start of the conversation without the request being expressed.
- Calls that give rise to a saturation or deterrence message.

Management of availability		
C8	Taking calls	The call is picked up in less than five rings or 20 seconds.
C10	Access to the desired service	Access to the desired service through an Interactive Voice Responder or an operator in less than one minute (criterion does not apply if the company does not have an IVR).
C9	Processing time	The mystery customer's inquiry is processed in less than one minute after he or she chooses to talk to an advisor.
C12	Waiting times	The advisor warns the mystery customer that he or she must wait, turns on some music or a voice message for a period of no more than one minute and resumes the call by using a polite phrase (criterion does not apply in the case of an immediate response).
C11	Differentiated response	Offer and promise to call back in less than 12 working hours (criterion does not apply in the case of an immediate response).

Relations		
C2	Identification	The company name or business name of the participant is specified at the start by an Interactive Voice Responder (IVR) or a waiting message (criterion does not apply if the mystery customer is greeted immediately by an advisor).
C1	Greeting	The advisor greets the mystery customer at the beginning of the call using a polite phrase and identifies the name of the participant and the participant's advisor. The advisor speaks correctly and at an appropriate speed.
C3	Appropriate choice of words	The advisor uses words that are appropriate for the service required (vocabulary is easy to understand, no internal abbreviations or difficult technical terms).
C4	Reformulation	The advisor rephrases the mystery customer's request to ensure that he or she has understood the problem and/or uses the information shared by the mystery customer.
C5	Transfers	When the mystery customer is transferred to a new advisor, the mystery customer is put in contact with the right person and the problem as well as the information of the mystery customer has been forwarded in advance by the initial advisor (criterion does not apply if the entire call is managed by a single advisor).
C6	Listening skills	The advisor must not interrupt the mystery customer, but he or she can redirect the conversation to the specific problem at hand in a professional and positive manner.
C7	Courtesy	The advisor must use the name and/or title of the mystery customer when saying goodbye. He or she must ensure that he or she has responded properly to the request and must leave it to the customer's initiative to end the call.

Quality of the response and human quality		
C13	Quality of the response	The mystery customer receives an appropriate response to his or her request. The response will depend on the script used for the request.
C14	General impression	The overall quality of the conversation will be judged in absolute terms. The mystery customer will analyze how empathetic and natural the interview is (he or she will refer to the services that he or she learned about during his or her different experiences).
C15	Quality of tone	The mystery customer will measure the quality and consistency of the tone used by the advisor during the conversation.

ANNEX 4 - EVALUATION CRITERIA E-MAILS AND FORMS

The following types of e-mails and forms will give rise to an overall rating of "Poor" or "Non-Existent":

- E-mails or forms that are sent and trigger and/or are returned with an error message (incorrect address, address unknown, form is impossible to confirm, etc.).
- E-mails or forms that go unanswered for more than two working days.
- E-mails or forms that remain unanswered.

Management of availability		
C9	Response time	The e-mail is responded to within one working day.
C10	Interim e-mail	The e-mail confirming receipt must contain a specific date and specify the waiting time, which must not be more than one working day (criterion does not apply in the case of immediate responses or if there is no interim response).
Relations		
C1	Sender	The e-mail address or name of the sender is clear and identifies the participant.
C2	Purpose	The purpose of the e-mail response is appropriate for the request and clearly indicates that the e-mail is being made in response to a request made by the mystery customer.
C3	Personalization	The response is personalized using at least the title and/or first name and/or last name or pseudonym of the mystery customer.
C5	Context	The situation of the initial request is summarized (reminder of the context).
C4	Drafting	The e-mail is written in correct French and does not contain any spelling or grammatical mistakes (no use of internal abbreviations or difficult technical terms).
C7	Identification	The person responding to the e-mail can be identified by his or her title and/or first name and/or last name.
C8	Continuing the relationship	The e-mail contains contact details so that the relationship can be continued through another channel (telephone numbers or e-mail addresses or a link to a contact form or chat session, etc.).
C6	Courtesy	The e-mail ends using a courteous phrase.
Quality of the response and human quality		
C11	Quality of the response	The mystery customer receives an appropriate response to his or her request. The response will depend on the script used for the request.
C12	General impression	The overall quality of the e-mail will be judged in absolute terms (the mystery customer will refer to the services that he or she has learned about during his or her different experiences).
C13	Tone	The mystery customer will measure the quality and consistency of the tone used.
C14	Legibility	The e-mail is legible and does not contain any characters that are incompatible with the internet browser, software or provider being used.

ANNEX 5 - EVALUATION CRITERIA WEB NAVIGATION

The following types of web navigation will give rise to an overall rating of "Poor" or "Non-Existent":

- Web navigations to which the Participant's server does not respond.
- Web navigations giving rise to an error message that cannot be resolved by reversing the action.

User experience and accessibility		
C1	Visibility	The self-service or search engine or virtual agent is visible and can be accessed from the homepage.
C2	Functionality	The hypertext link on the response page can be used to access the function described (this criterion does not apply if there is no hypertext link).
C3	Effectiveness	The pages visited are all useful (no tunnel page, sponsored page, pop-in or pop-up advert or satisfaction survey).
C4	Reversal of actions	The mystery customer can go back to the previous page while navigating without an error message being displayed.
C5	Attractiveness	The number of clicks made to access information is less than or equal to four.
C6	Identification	Regardless of the page, there is information that identifies the company who owns the page.
C7	Form of the response	The response is concise and does not exceed one page (computer screen with a resolution of 1366 x 768 pixels) or can be seen in two scrolls when viewed on a smartphone or tablet.
C8	Expertise	The search engine or virtual agent understands simple words (no technical words) (criterion does not apply if there is no search engine or virtual agent).
Quality of the response		
C9	Drafting	The response is written in correct French and does not contain any spelling or grammatical mistakes (no use of internal abbreviations and difficult technical terms).
C10	Continuing the relationship	If no response is available, another contact channel is clearly offered to obtain the desired response (criterion does not apply if a response has been made).
C11	Quality of the response	The mystery customer receives an appropriate response to his or her request. The response will depend on the script used for the request.
General impression of the service		
C12	General impression	The overall quality of the website will be judged in absolute terms (the mystery customer will refer to the services that he or she has learned about during his or her different experiences).
Technical quality		
C13	Legibility	The navigation occurs with no sign of incompatibility with the browser, the provider or the model of smartphone or tablet.

ANNEX 6 - EVALUATION CRITERIA SOCIAL NETWORKS (FACEBOOK)

The following types of messages on social networks will give rise to an overall rating of "Poor" or "Non-Existent":

- Articles or comments which cannot be posted in the space dedicated to the Participant nor sent as a private message.
- Articles or comments that go unanswered for more than 12 working hours.
- Unanswered articles or comments.

User experience and accessibility		
C1	Identification of the Participant	Regardless of the page, there is information that identifies the company who owns the page (a logo, photo, etc.).
C2	Contact details of the Participant	The dedicated site of the participant in the social network clearly offers other contact channels (telephone numbers or e-mail addresses or a link to a contact form or chat session, etc.).
Relations		
C3	Personalization	The response is personalized using at least the title and/or first name and/or last name or pseudonym of the mystery customer.
C4	Drafting	The message is written in a French which is appropriate for the channel and does not contain any spelling or grammatical mistakes (no use of internal abbreviations and difficult technical terms).
C5	Form of the response	The response is concise and does not exceed six lines for responses given directly in the dedicated site of the participant (the wall). In the case of private messages, the response does not exceed one page (for screens with a resolution of 1366 x 768 pixels).
C6	Courtesy	The response ends using a courteous phrase.
C7	Identification of the person	The person can be identified by his or her first name and/or last name.
C8	Continuing the relationship	The respondent includes his or her contact details in the response message (telephone numbers or e-mail addresses or a link to a contact form or chat session, etc.) (criterion does not apply if other contact channels are clearly proposed and visible in the participant's dedicated site).
Management of availability		
C9	Response time	The message is answered within two working hours.
C10	Interim message	The participant can send a message indicating a waiting time is required. This message must include a specific date and specify the waiting time, which must not be more than 6 working hours (criterion does not apply in the case of immediate responses or if there is no interim response).
Quality of the response		
C11	Quality of the response	The mystery customer receives an appropriate response to his or her request. The response will depend on the script used for the request.
C12	Functionality of the link	The hypertext link in the response message can be used to access the function described (this criterion does not apply if there is no hypertext link).
Human quality		
C13	General impression	The overall quality of the interaction will be judged in absolute terms (the mystery customer will refer to the services that he or she has learned about during his or her different experiences).
C14	Tone	The mystery customer will measure the quality and consistency of the tone used.

ANNEX 7 - EVALUATION CRITERIA CHAT

The following chat conversations will give rise to an overall rating of "Poor" or "Non-Existent":

- Unavailable or non-existent chat windows after a navigation time of more than seven clicks or 90 seconds on the website.
- Conversations that last for three or more minutes from the start of the conversation during which the request is not expressed.
- Conversations that receive a response to the initial interaction after three or more minutes.
- Interactions that receive no response.

Accessibility and management of availability		
C1	Visibility	The number of clicks made to access the chat window is less than or equal to four.
C2	Processing time	The mystery customer's inquiry is processed by an advisor via a chat window in less than 30 seconds.
C3	Responsiveness	The advisor will respond to each question of the mystery customer in a responsive manner in less than 45 seconds.
Relations		
C4	Greeting	The advisor is identified by his or her first name and/or last name and starts the conversation with a polite phrase.
C5	Personalization	The response is personalized using at least the title and/or first name and/or last name of the mystery customer (criterion does not apply if a window is available immediately or when no personal information is requested).
C6	Drafting	The entire conversation must be drafted in correct French and must not include any spelling or grammatical mistakes (certain abbreviations or technical terms can be considered as vocabulary or suitable words if this is appropriate for the context and the business segment of the company).
C7	Courtesy	The advisor makes sure that he or she has responded to all the questions of the mystery customer and says goodbye using a polite phrase.
Quality of the response		
C8	Form of the response	The advisor sends his or her responses phrase by phrase and not block by block in order to facilitate the experience of the mystery customer.
C9	Functionality of the link	The hypertext link in the response message can be used to access the function described (this criterion does not apply if there is no hypertext link).
C10	Quality of the response	The mystery customer receives an appropriate response to his or her request. The response will depend on the script used for the request.
Technical quality		
C11	Legibility	The conversation takes place with no sign of incompatibility with the browser or the provider.
C12	Conversation history	A means of saving the conversation is clearly visible in the chat window or is offered by the advisor or is sent by e-mail when the address is provided.
Human quality		
C13	General impression	The overall quality of the interaction will be judged in absolute terms (the mystery customer will refer to the services that he or she has learned about during his or her different experiences).
C14	Tone	The mystery customer will measure the quality and consistency of the tone used.