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## How to Build an AI CSR Phone Call Reviewer Automation in n8n

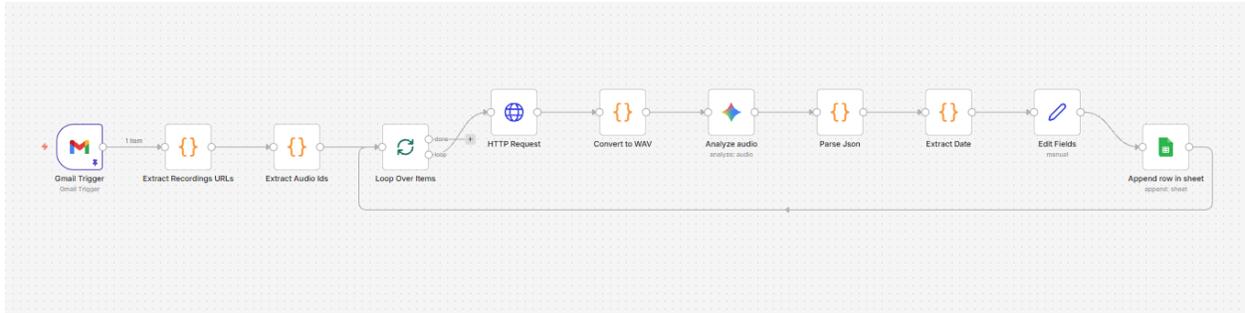
If you run an appliance service business, you already know this problem:

You *want* to review CSR phone calls... but realistically, you don't have the time to listen to dozens of recordings every week.

Important coaching moments get missed. Training becomes reactive. And issues with greeting, call control, or confidence don't show up until customers complain or KPIs slip.

This automation solves that problem.

It automatically reviews CSR phone calls using AI, scores performance across key categories, and logs everything into a Google Sheet — without anyone on your team touching the recording.



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## What This Automation Does (In Plain English)

Here's the flow:

1. A phone call recording is shared from your phone system via email
2. n8n automatically detects the email
3. The recording is downloaded and converted to audio
4. AI listens to the call and evaluates the CSR
5. The results are scored, summarized, and logged for tracking and coaching

No manual review. No spreadsheets to fill out. No “I’ll get to it later.”

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## Why This Matters for Appliance Businesses

Most appliance companies *want* better call quality but struggle to enforce it consistently.

This automation helps you:

- Spot training gaps early
- Coach CSRs with real examples
- Track performance trends over time
- Maintain brand consistency on every call

- Improve booking rates and customer experience

And most importantly — it removes the human bottleneck.

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## **The Scoring Framework (What AI Actually Evaluates)**

The AI is prompted to act as a **Call Quality Assurance Manager** specifically for an appliance service business.

Each call is scored from **1 to 100** across these categories:

### **1. Greeting & Professionalism**

- Was the greeting friendly and on-brand?
- Did the CSR state their name?
- Did they confirm or collect customer information properly?

### **2. Active Listening & Understanding**

- Did the CSR let the customer speak?
- Did they ask clarifying questions?
- Did they demonstrate call control?

### **3. Helpfulness & Problem Resolution**

- Was a clear next step provided?
- Did the CSR take ownership of the issue?
- Did the customer feel supported?

### **4. Confidence & Service Knowledge**

- Did the CSR sound confident?
- Did they understand services, scheduling, and policies?
- Any hesitation or misinformation?

## 5. Closing & Customer Care

- Was the call closed professionally?
- Did the CSR offer final assistance?
- Was the brand represented positively?

The AI also generates:

- Overall sentiment (positive / neutral / negative)
- Strengths (3–5 bullets)
- Areas for improvement (2–4 bullets)
- A short professional call summary

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## How the Automation Works (High-Level)

You don't need to understand every technical detail to appreciate what's happening:

### Step 1: Gmail Trigger

The automation monitors a specific inbox for call recording emails from your phone provider.

### Step 2: Extract Recording Links

A custom code step scans the email and pulls out the secure recording URLs and call metadata.

### Step 3: Download & Normalize Audio

Each recording is downloaded and converted into a format the AI can analyze reliably.

#### **Step 4: AI Call Analysis**

The audio is sent to an AI model with a strict scoring and reporting prompt tailored for appliance CSRs.

#### **Step 5: Structured Output**

The AI returns **clean JSON only** — no fluff, no commentary — making it reliable for automation.

#### **Step 6: Google Sheets Logging**

Each reviewed call is automatically logged into a Google Sheet with:

- CSR name
- Call date
- Scores per category
- Overall score
- Strengths
- Improvement areas
- Call summary

This gives you an instant call quality dashboard without buying new software.

CSRs Call Analyzer													
File Edit View Insert Format Data Tools Extensions Help													
100%   \$ % .00 123 Default...   - 10   B Z   A													
Date of Call													
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Date of Call	CSR	Extension	Caller Number	Overall Sentiment	Greeting	Listening	Helpfulness	Confidence	Closing	Overall Score	Strengths	Improvements	Summary
11/13/2025	Naomi	1006	8005786890	positive		95	90		90	85	90	90	<p>The call was handled efficiently and professionally by CSR Naomi. She provided an excellent greeting and quickly ascertained the caller's need to verify service availability for a specific zip code. Naomi promptly requested the necessary information and confirmed that the area is serviced, fully resolving the caller's query. The interaction was positive and demonstrated strong customer service skills, with a polite closing that left the caller feeling supported.</p>
12/9/2025	Joan			positive		90	85		95	100	95	93	<p>The CSR Joan, delivered an excellent customer service experience. She began the call with a professional and friendly greeting, clearly stating her name and following the company script. Joan demonstrated strong product and service knowledge by clearly outlining the service process, associated fees, and the specific payment policy for landlords. Although she missed an initial opportunity to proactively recognize the customer as a repeat client for the same property, she maintained a confident and helpful demeanor throughout. The call concluded with a polite closing, ensuring the customer felt informed and supported.</p>
12/9/2025	Joan			positive		100	95		95	98	98	97	<p>The call began with an exemplary and professional greeting from Joan. The customer inquired about oven repairs due to a gas leak at a rental property. Joan skillfully guided the conversation to gather essential information, such as the zip code, when the oven's make was initially unavailable. She provided a detailed and accurate explanation of the service process, including the call-out fee, diagnostic procedure, and a specific policy for landlords requiring upfront payment. Joan handled the customer's need to obtain the oven's make with patience and reassurance, confirming availability for the following day. The call concluded with a friendly and professional closing, reflecting a high standard of customer service.</p>

# How Appliance Companies Are Using This

This automation works well for:

- Weekly CSR coaching sessions
- Identifying training needs before metrics drop
- Tracking improvement over time
- Supporting new hires
- Removing subjectivity from call reviews

Some teams review **every call**.  
 Others sample **only low-scoring calls**.  
 Some use it purely for coaching — not discipline.

The key is: **you finally have visibility without overhead.**

# Who This Automation Is For

- Appliance service owners
- Office managers
- CSR supervisors
- Operations leaders
- Anyone responsible for call quality

You don't need to be technical.  
You don't need to replace your team.  
You just need better insight.

## How to Set Up the CSR Phone Call Reviewer Automation (Step-by-Step)

This automation is designed so you **don't need to build anything from scratch**.

You'll import a ready-made n8n workflow, then connect your own tools (email, AI, and Google Sheets). Once connected, the automation runs on its own.

Below are the exact steps.

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### What You'll Need Before You Start

Make sure you have the following ready:

- An **n8n account** (cloud or self-hosted)
- Access to the **email inbox** where call recordings are delivered
- A **Google account** for logging results
- An **OpenAI API key** (or equivalent AI provider, depending on your setup)

- Call recordings sent by your phone system via email

⚠ You do NOT need programming knowledge.

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## Step 1: Import the Automation Template into n8n

1. Log into your n8n dashboard
2. Click **Workflows**
3. Click **Import**
4. Upload the `CSR Phone Call Reviewer.json` file
5. Save the workflow

At this point, the workflow will appear but **will not run yet**.

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## Step 2: Connect Your Email Account (Trigger Node)

This automation starts when a call recording email arrives.

1. Open the **Email Trigger** node
2. Choose your email provider (Gmail, IMAP, etc.)
3. Click **Create New Credential**
4. Sign in and authorize access
5. Select:
  - The inbox or label/folder where call recordings arrive
  - The polling frequency (recommended: every 5–10 minutes)

✓ This tells n8n *when* to run the automation.

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## Step 3: Confirm Call Recording Email Format

This workflow expects:

- A recording link or attachment
- Call metadata (date, time, caller info)

Before proceeding:

- Open one of your real call recording emails
- Confirm it matches what your phone system normally sends

If your provider formats emails differently, you may need **minor adjustments** to the extraction step (documented inside the workflow).

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## Step 4: Set Up AI Credentials (OpenAI Node)

This is the “listener” part of the automation.

1. Open the **AI Analysis** node
2. Click **Create New Credential**
3. Paste your **OpenAI API key**
4. Save

No prompt editing required.  
The scoring logic is already built and tested.

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## Step 5: Review the Call Evaluation Prompt (Optional but Recommended)

Inside the AI node, you'll see a prompt that instructs the AI to act as:

*A Call Quality Assurance Manager for an appliance service business*

You can safely customize:

- Company name
- Brand tone expectations
- Internal CSR standards

Do **not** change:

- Output format
- Scoring structure
- JSON-only requirement

These are required for reliability.

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## Step 6: Connect Google Sheets (Logging Results)

This is where call reviews are stored.

1. Open the **Google Sheets** node
2. Create a new Google Sheet
3. Copy the Sheet ID
4. Paste it into the node
5. Connect your Google account via credentials

Recommended columns:

- Date

- CSR Name
- Call Score
- Greeting Score
- Listening Score
- Resolution Score
- Confidence Score
- Closing Score
- Strengths
- Improvements
- Summary

The template already maps these fields.

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## Step 7: Test the Workflow with a Real Call

Before turning it on:

1. Select **Test Workflow**
2. Send a real call recording email to the inbox
3. Watch the workflow execute step by step
4. Confirm:
  - Audio is processed
  - AI returns scores
  - Google Sheet updates correctly

If the test passes, you're ready.

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## Step 8: Activate the Workflow

1. Toggle the workflow **ON**
2. That's it

From now on:

- Every call recording email is reviewed automatically
  - Scores and summaries appear in your Google Sheet
  - No manual intervention required
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## How to Use the Results (Important)

This automation works best when used for:

- Coaching conversations
- Training feedback
- Trend tracking over time

It should **not** be used as:

- A disciplinary-only tool
- A replacement for human review
- A "gotcha" system

AI provides consistency.  
Leadership provides judgment.

## Final Thoughts

The CSR Phone Call Reviewer isn't about replacing people or policing your team. It's about visibility and consistency.

Most appliance businesses know call quality matters, but reviewing calls manually doesn't scale. This automation solves that by doing the repetitive work for you—listening, scoring, and summarizing—so your team can focus on coaching, improvement, and better customer experiences.

When used correctly, this workflow becomes a quiet accountability system running in the background. It highlights patterns, surfaces coaching opportunities early, and helps you maintain a consistent brand voice as your business grows.

AI handles the repetition.  
You handle the judgment.

That's how automation should work in a service business.