

Sales GUIDELINE

Evaluation Score

Greeting

A) Used the appropriate greeting : This is (First Name) with " _____ ", How may I help you?

N/A No Yes

B) Demonstrated eagerness to help using a statement such as: I can help you with that.

N/A No Yes

C) Requested Information to access account **WITH** a benefit.

N/A No Yes

D) Ask/Verify/Update telephone number (Non-Scoring)

SSN DL/ID Account

Password Other None

N/A No Yes

E) Verified privacy information **WITH** a benefit before providing any account information.

N/A No Yes

F) Thanked customer for information provided and **proceeded** with using customer's last name.

N/A No Yes

Call Presentation

A) Presented a positive professional image demonstrating eagerness to help, showing empathy for customer's concerns and/or taking ownership of the call.

N/A No Yes

B) Spoke clearly with a pleasant tone, pace and at a comfortable level.

N/A No Yes

C) Used appropriate, professional language (I.E. avoided company jargon, improper grammar and slang terms).

N/A No Yes

D) Answered customer's questions clearly/logically. Provided and took the initiative and accurately answered all questions asked.

N/A No Yes

E) Actively listened and addressed customer's concerns.

F) Used the hold/mute function properly each time used. Requested permission **WITH** a benefit, thanked customer, then upon return, thanked customer for holding. If applicable, offered call back option.

N/A No Yes

G) Acknowledged customer by last name or first name depending on your guidelines at least once **after** greeting.

N/A No Yes

Sales Presentation

A) Utilized the sales script offering targeted package with product information.

N/A No Yes

B) Probed for interest/needs	N/A	No	Yes
C) Recommended package with features and benefits	N/A	No	Yes
D) Acknowledged each objection offered with a solution	N/A	No	Yes
E) Offered/presented appropriate resolution tailored to customer's to needs	N/A	No	Yes
F) Paraphrased to clarify understanding of each objection to overcome	N/A	No	Yes
G) Ask to place the order and confirm package/service, and gained commitment	N/A	No	Yes

Post Sales Process

A) Noted account completely and accurately.	N/A	No	Yes
B) Obtained all needed items for accurate sales processing or installation.	N/A	No	Yes
C) Review installation checklist or order processing re-verification	N/A	No	Yes
D) Outlined payment options (i.e. cash, check, credit card, simple pay payment center, etc.).	N/A	No	Yes

Billing - Past Due

A) Probed to identify/resolve the customers issues/concerns.	N/A	No	Yes
B) Provided customer with complete/accurate information (i.e. equipment return, services, rates, due dates, past due status, balance, etc.).	N/A	No	Yes

Evaluation Score

C) Outlined payment options (i.e. cash, check, credit card, payment center etc.).	N/A	No	Yes
D) Offered payment arrangements to satisfy customer.	N/A	No	Yes
E) Explained interruption of service and its timing (i.e. soft & hard disconnect dates).	N/A	No	Yes
F) Offered appropriate resolution to attempt to satisfy customer and noted account.	N/A	No	Yes

Disconnect Uncontrolled

A) Performed exit interview, including forwarding address. I.e. "we are always looking for ways to improve our service. Can you give us any feedback on the service you received with _____?"

N/A	No	Yes
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Disconnect Controlled

A) Listened & apologized- asked customer WITH a benefit for reason of disconnect or downgrade.

N/A	No	Yes
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B) Problem solving- probed to identify customer's interests to determine possible alternatives.

N/A	No	Yes
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C) Presented features and benefits to retaining service.

N/A	No	Yes
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D) Provided customer with complete/accurate information (i.e. equipment return, services, rates, due dates, past due status, balance, etc.).

N/A	No	Yes
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E) Asked for and noted account with forwarding address.

N/A	No	Yes
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Service & Repair

A) Probed to identify/resolve the customer's issues/concerns.

N/A	No	Yes
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B) Offered appropriate resolution (i.e. credit or coupon) to attempt to satisfy customer and noted account.

N/A	No	Yes
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C) Followed system specific procedures to address the service problem.

N/A	No	Yes
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D) Successfully resolved the service problem .

N/A	No	Yes
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E) Arranged service call or advanced trouble shooting within guidelines.

N/A	No	Yes
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F) Provided customer with complete/accurate information (i.e. equipment return, services, rates, due dates, past due status, balance, etc.).

N/A	No	Yes
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G) Review repair checklist

N/A	No	Yes
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Closing

A) Reviewed commitment and/or pertinent information and confirmed customer satisfaction (i.e. Does the solution work for you?).

N/A	No	Yes
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B) Recognized and transitioned to Sales Opportunity (i.e. I see you currently don't have our _____ or Oh, by the way have you heard about...).

N/A	No	Yes
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C) Recognize and transition to Advanced Sales Opportunity. (id.: Did you know that we now offer _____? ... -or- Oh, by the way have you heard about our _____?...)

N/A	No	Yes
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D) Attempt first call resolution, such as: Is there anything else I can help you with?	N/A	No	Yes
E) Offered first name for customer to reference. Thanked the caller appropriately (i.e. Thank you for calling " _____ " or Thank you for being an " _____ customer".	N/A	No	Yes

Non - Tolerated

Failure in this area will lead to disciplinary actions which may include immediate termination.

A) Continuously rude - MUST have comment.	N/A	No	Yes
B) Profanity - MUST have comment.	N/A	No	Yes
C) Offering the competition - MUST have comment.	N/A	No	Yes
D) Threatening the customer - MUST have comment.	N/A	No	Yes
E) Intentionally hung up on , didn't respond to or improperly transferred customer (i.e. transferred to ACD) without just cause - MUST have comment.	N/A	No	Yes
F) Added un-ordered services - MUST have comment.	N/A	No	Yes
G) Unnecessarily irritated customer - MUST have comment.	N/A	No	Yes
H) Negative comments of company, policy, and/or procedures - MUST have comment.	N/A	No	Yes
I) Encouraged unprofessional conversation (i.e. inappropriate personal conversation) - MUST have comment.	N/A	No	Yes
J) Continuously interrupted customer	N/A	No	Yes
K) Personal call monitored - MUST have comment.	N/A	No	Yes
L) Declined escalation of call to a supervisor.	N/A	No	Yes
M) Provided false and/or mis-leading information to the customer.	N/A	No	Yes

Outstanding

A) Received an un-solicited compliment from the customer that reflected positively on the CSR's performance and_____.

N/A

No

Yes

B) Retained the customer.

N/A

No

Yes

C) Handled Supervisor call without/preventing escalation.

N/A

No

Yes