

Sample Monitoring Form #1

Call Taker's Name _____

Account # or Customer Name _____

Evaluator's Name _____

Time _____

Team _____

Date _____

Reason for Call

Rate 1 through 5 on effectiveness in the score box provided; 1 being the least effective performance of the action - 5 being the most effective performance of the action.

YES NO NA Score

1. Appropriate Greeting
2. Verified Account Correctly
3. Asked the Customer "how can I assist you" or "what can I do for you today"
4. Used Appropriate Tone of Voice
5. Demonstrated Active Listening (*Responded to customer's needs*)
6. Used Call Control Techniques
7. Provided correct account/billing information
8. Attempted Cross Sell
9. Attempted Retain (when applicable)
10. Appropriate closing

Comments:

Total Score: _____

50 = perfect call when customer calls to cancel

45 = perfect call when Retain is NA

Areas for Improvement & Coaching:
