|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Performance Area** | **Yes** | **No** | **N/A** | **Comments** |
| Throughout the call: |  |  |  |  |
| Polite/good tone of voice |  |  |  |  |
| Please and thank you |  |  |  |  |
| Positive word choice |  |  |  |  |
| Did not interrupt the caller |  |  |  |  |
| Used callers name if was provided |  |  |  |  |
| Greeting: |  |  |  |  |
| Used required greeting – including warm tone, provided name and offered assistance |  |  |  |  |
| Showed Empathy |  |  |  |  |
| Acknowledged caller’s situation – I understand, I am sorry to hear(restates issue) |  |  |  |  |
| Uses Questions to Determine Next Steps |  |  |  |  |
| Used open and closed ended questions to determine reason for call and appropriate resolution |  |  |  |  |
| Hold Procedure: |  |  |  |  |
| Asked caller for permission to place them on hold for 2 minutes |  |  |  |  |
| Checked back with caller prior to 2 minutes |  |  |  |  |
| Explained why they were using hold |  |  |  |  |
| Transfer Procedure |  |  |  |  |
| Ask permission to transfer the call |  |  |  |  |
| Explain why and where |  |  |  |  |
| When possible provide the direct number for the caller for future |  |  |  |  |
| Thank caller and complete the transfer |  |  |  |  |
| Call Closing |  |  |  |  |
| Thank the caller |  |  |  |  |
| Offered resources if available- self help |  |  |  |  |
| Provided appropriate resolution |  |  |  |  |
| Additional Notes: | | | | |
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