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Evaluation Details

<b>EDIT MODE</b>	<b>Agent:</b>	[Form Design]	<b>Evaluation Start Time:</b>	10/15/2008 11:46 AM
	<b>Group:</b>	[Form Design]	<b>Evaluation End Time:</b>	IN PROGRESS...
	<b>Evaluator:</b>	[Form Design]	<b>Interaction Date:</b>	N/A

## Scores:

<b>Overall Score:</b>	<b>94/104 (90.38%)</b>
 Call Handling	<b>24/24 (100%)</b>
 Compliance	<b>15/15 (100%)</b>
 Listening	<b>10/10 (100%)</b>
 Communication	<b>15/15 (100%)</b>
 Empathy	<b>5/5 (100%)</b>
 Procedural Requirements	<b>25/35 (71.43%)</b>

## Evaluation Comments:

No Comments Available

**Call Segment: Greeting, Score: 14/14 (100%)**

Question: Did the CSR Identify the Program?  
 Answer: Yes No  
 Competency: Call Handling  
 Score: 5/5 (100%)

Question: Did the CSR Identify Him/herself?  
 Answer: Yes No  
 Competency: Call Handling  
 Score: 4/4 (100%)

Question: CSR verified caller name, address and phone number?  
 Answer: Yes No  
 Competency: Compliance  
 Score: 5/5 (100%)

**Call Segment: Data Collection, Score: 45/45 (100%)**

Question: CSR determined the purpose of the call quickly and correctly.

Answer:           Excellent   Good   Fair   Poor

Competency: Call Handling

Score: 10/10 (100%)

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Question: CSR obtained all pertinent information and make changes accordingly?

Answer:           Yes   No

Competency: Compliance

Score: 10/10 (100%)

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Question: CSR was attendant to the caller's needs.

Answer:           Excellent   Very good   Good   Fair   Poor

Competency: Listening

Score: 10/10 (100%)

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Question: CSR used proper grammar/articulation

Answer:           Excellent   Good   Fair   Poor

Competency: Communication

Score: 5/5 (100%)

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Question: CSR used client name or other formal term.

Answer:           Yes   No

Competency: Call Handling

Score: 5/5 (100%)

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Question: CSR demonstrated empathy towards caller's needs.

Answer:           Yes   No

Competency: Empathy

Score: 5/5 (100%)

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### Call Segment: Enrollment / Disenrollment, Score: 20/30 (66.67%)

Question: Asked if the customer understood (and explained if necessary) what it means to enroll in a plan.

Answer:           Yes   No

Competency: Procedural Requirements

Score: 5/5 (100%)

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Question: Explained timing of events to customers (disenrollment/enrollment effective dates/90 day plan change).

Answer:           Yes   No

Competency: Procedural Requirements

Score: 10/10 (100%)

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Question: How well did CSR demonstrate proper documentation of information on call-taker screen/cards?

Answer:           Choose One   Excellent   Good   Fair   Poor

Competency: Procedural Requirements

Score: 0/10 (0%)

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Question: CSR used proper hold procedure.

Answer: Yes No

Competency: Procedural Requirements

Score: 5/5 (100%)

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**Call Segment: Closing, Score: 15/15 (100%)**

Question: Appropriate closing was used.

Answer: Yes Disagree

Competency: Procedural Requirements

Score: 5/5 (100%)

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Question: CSR reiterated highlights of the call to the caller.

Answer: Yes No

Competency: Communication

Score: 5/5 (100%)

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Question: CSR thanked the caller for their time and business.

Answer: Yes No

Competency: Communication

Score: 5/5 (100%)

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