

Inside Sales Evaluation Form Details

<b>EDIT MODE</b>	<b>Agent:</b>	[Form Design]	<b>Evaluation Start Time:</b>	10/15/2008 11:42 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>45/109 (41.28%)</b>
 Communication	<b>20/45 (44.44%)</b>
 Procedural Requirements	<b>10/24 (41.67%)</b>
 Compliance	<b>5/15 (33.33%)</b>
 Product Knowledge	<b>5/5 (100%)</b>
 Listening	<b>5/5 (100%)</b>
 Sales	<b>0/15 (0%)</b>

Evaluation Comments:

No Comments Available

**Call Segment: Greeting, Score: 20/30 (66.67%)**

Question: How well did the agent use the appropriate greeting and properly identify themselves and purpose of the call?

Answer: Choose One Very Good Good Poor

Competency: Communication

Score: 0/5 (0%)

Question: Did the agent obtain and/or verify prospect information?

Answer: Yes No

Competency: Procedural Requirements

Score: 10/10 (100%)

Question: How well did the agent pace the conversation to match the customer's ability to comprehend and set the speed at where the customer is comfortable communicating?

Answer: Excellent Very Good Good Fair Poor

Competency: Communication

Score: 10/10 (100%)

Question: Did the agent politely and effectively keep the call moving toward a proper objective?

Answer: Choose One Yes No

Competency: Communication

Score: 0/5 (0%)

**Call Segment: Qualification, Score: 10/30 (33.33%)**

Question: How effective was the agent in actively engaging the prospect in the qualifying process?

Answer: Choose One    Excellent    Very Good    Fair    Good    Poor

Competency: Communication

Score: 0/10 (0%)

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Question: How effective was the agent with incorporating the script into their style, following call guidelines, but also sounding natural? (5 = Excellent, 0 = Fail)

Answer:            5    4    3    2    1    0

Competency: Communication

Score: 10/10 (100%)

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Question: Based on the qualification, did the agent move the prospect to the proper next steps?

Answer:            Yes    No    Choose One

Competency: Compliance

Score: 0/10 (0%)

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### Call Segment: Selling Skills, Score: 10/25 (40%)

Question: Did the agent demonstrate thorough product knowledge? (5= Excellent, 0 = Fail)

Answer:            0    1    2    3    4    5

Competency: Product Knowledge

Score: 5/5 (100%)

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Question: Did the agent perform proper active listening skills? (5= Excellent, 0 = Fail)

Answer:            0    1    2    3    4    5

Competency: Listening

Score: 5/5 (100%)

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Question: Did the agent upsell the customer to the new software upgrade?

Answer:            Choose One    Yes    No

Competency: Sales

Score: 0/10 (0%)

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Question: Did the agent use assumptive closing skills?

Answer:            Choose One    Yes    No

Competency: Sales

Score: 0/5 (0%)

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### Call Segment: Closing, Score: 5/24 (20.83%)

Question: Based on prospect answers, did the agent effectively and properly move to the next step, following procedure?

Answer: Choose One Yes No

Competency: Procedural Requirements

Score: 0/9 (0%)

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Question: How effectively did the agent process information quickly, thoroughly and accurately? (0 = Poor, 5 = Excellent)

Answer: 0 1 2 3 4 5

Competency: Compliance

Score: 5/5 (100%)

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Question: Did the agent know when and how to bring the call to a positive conclusion without rushing the prospect off the phone?

Answer: Choose One Yes No

Competency: Communication

Score: 0/5 (0%)

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Question: Did the agent properly close the call, by inputting the data in the closing fields?

Answer: Choose One Yes No

Competency: Procedural Requirements

Score: 0/5 (0%)

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