

ESD Call Monitoring Audit Form

APPENDIX 16

The purpose of this audit is to check how well we respond to what the customer wants and needs. We want to focus on customer service not process. This information helps the Supervisor to suggest improvements to staff.

- ☒ Call monitoring is done for Business Consultants & Business Service Representatives in Central Office.
- ☒ The audit is composed of 2 or more monitoring calls per month for each staff member
- ☒ The auditor will make important observations and identify patterns or trends that need supervisor attention.

EMPLOYEE/MONITORING DATA			
Employee Name:		Supervisor Name:	
Monitor:			
Audit Month:		Date of Audit:	

CALL AUDIT

INITIAL

Greeting	Greets customer; refers to customer by name (1 pt)	
Identity	Gives name and organization (2 pts)	
Tone	Professional, upbeat, friendly - not defensive (3pts)	

Auditor Comments:

Conversation

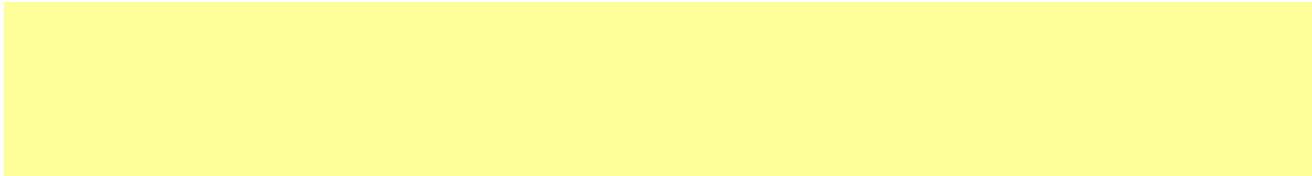
Purpose	(outreach only) reason for call is stated (2 pt)	
Communication	Language is jargon-free, coherent, not hurried (2 pts)	
Listen	Actively listens, without interrupting; asks questions when appropriate (3 pts)	
Knowledge	Offers suggestions/solutions connecting the customer with WFS products & services; knowledgeable of available resources (3 pts)	

Auditor Comments:

CLOSING

Reiteration	Summarizes agreed upon solution(s) (1 pt)	
	States next step action(s) (1 pt)	
	Thanks the customer (2 pts)	

Auditor Comments:



Total number of points on this job posting: 0

Rating Scale:

- Exceeds = 16 - 20 total points**
- Meets= 10 – 15 total points**
- Does Not Meet = 9 points or less**

Rating on this job posting audit Does Not Meet
CMA100108