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| --- | --- | --- | --- | --- | --- |
| Employee Name: |  | Observer’s Name: |  | Customer’s Name: |  |

Date:

|  |  |  |
| --- | --- | --- |
| Customer Service Observation | Customer Service Meets Expectations Date: | Yes / No |

* You greeted the customer correctly
* You listened to understand what the customer wanted from Workforce Solutions
* You gave good advice and/or the appropriate service to help the customer meet her/his needs (this includes a review of the number of contacts you gave the customer)
* You spent the time needed to give good service but did not spend excessive time
* You explained or confirmed the “next step” to the customer and made an appointment or introduced the customer to a staff specialist when applicable.

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| *Supervisor: Supervisor must describe the behavior observed and explain why it is good or how to improve* | | | |
|  | | | |
| Employee Initials or Signature: |  | Observer Initials or Signature: |  |

|  |  |  |
| --- | --- | --- |
| Quality of Referral | Staff Provided Contacts Meet Expectations | Yes / No |

* Job contacts you gave your customer meet all the employer job requirements

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| *Supervisor: List job posting numbers and note if contact matches all employer requirements – Use*  *quality of referral desk aid to determine quality* | | | | | *Yes* | | *No* |
|  | | | | |  | |  |
| Employee Initials or Signature: |  |  | Supervisor Initials or Signature: : | |  | | |
|  | | | |  | |  | | |
| Records Review | | | | Records Meet Expectations | | Yes / No | | |

* The customer’s WorkInTexas work application is thorough and up to date and active or inactive as appropriate
* TWIST Counselor notes are concise, thorough and accurately describe the customer’s situation.
* If there are several records they are consistent in representing the customer’s attributes and goals
* The appropriate employment plan is in TWIST and shows clear assessment, thorough employment plan and appropriate follow up

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| *Supervisor: Use Quality Desk aids to determine if the records meet quality expectations* | | | |
|  | | | |
| Employee Initials or Signature: |  | Observer Initials or Signature: |  |