Please take a moment to read through the entire monitor form. All your calls are recorded and we do spot monitor all team members.

Agents Name: Example Agent		
Customer account number: 123456789		
Order Number: P-152463		
Date: 06-27-2019		
Monitored By: Kaye Adkins		
Greeting:	Score	
Open with 'Thank you for calling Hale Groves. My name is….How may I help you?	(**Yes** or No)	
Asks appropriate questions to identify reason for call		
Verifies account information for sender (Includes e-mail & phone #)	(**Yes** or No)	
Order Entry Procedure:		
Obtains source code and/or discount information	(Yes or **No**)	
Describes Item information	(Yes or **No**)	
Verify Receivers address, phone #, arrival / ship date and message	(**Yes** or No)	*
Checks for acceptance and/or understanding	(**Yes** or No)	
Offered upsell, or upgrade, to customer	(Yes or **No**)	
Summarizes the call (total pkgs., total price, confirmation # & CCD info)	(Yes or **No**)	*
Is there anything else I can help you with today? (or may assist you with)	(**Yes** or No)	
Survey:	(Yes or **No**)	
Closing: Thank You for Calling Hale Groves	(**Yes** or No)	
Customer Care		
Listens attentively to customer without interruptions/refrain from asking to repeat.	(**Yes** or No)	
Empathize using a warm, attentive and caring tone	(**Yes** or No)	
Properly places customer on hold or performs a warm transfer	(**Yes** or No)	
Keep hold under 2 minutes	(**Yes** or No)	
Uses appropriate categories and details in system (ie; replacement/cancel/hold)	(**Yes** or No)	
Any action pertaining to order finished in timely manner	(**Yes** or No)	
Overall Agent Presentation		
Polite, Courteous and Professional	(**Yes** or No)	
Avoided Dead Air (max is 10 seconds)	(**Yes** or No)	
Expressed positive attitude and used softeners when appropriate.	(**Yes** or No)	
Provided 100% accurate information & followed policies, procedures & timeframes.	(**Yes** or No)	*
Total	80	
Minus 5 points per line. Minimum passing score 90		
*** No = Auto Fails**		
Agent Comments:		
Revised 8/08/2017 - 06/06/2019 KA		