

the art of
First
IMPRESSIONS
 Call Evaluation

Checklist

<u>Element</u>	<u>Rating*</u>	<u>Comments</u>
<ul style="list-style-type: none"> • Greeting/Introduction <ul style="list-style-type: none"> ○ Introduce Practice 	_____	_____
<ul style="list-style-type: none"> ○ Give Name 	_____	_____
<ul style="list-style-type: none"> ○ Get Name 	_____	_____
• Rapport	_____	_____
• Empathy	_____	_____
• Enthusiasm	_____	_____
• Use/Quality of On-Hold Message System	_____	_____
• Outgoing Message	_____	_____
• Questioning	_____	_____

*1 Excellent 2 - Good 3 - Fair 4 - Poor N.A. - Not Applicable



Call Evaluation Checklist, Page Two.

<u>Element</u>	<u>Rating*</u>	<u>Comments</u>
• Acknowledgement	_____	_____ _____
• Directions	_____	_____ _____
• Miscellaneous Observations (handling of price quoting, insurance ques., etc.)	_____	_____ _____

*1 Excellent 2 - Good 3 - Fair 4 - Poor N.A. - Not Applicable