

WHAT + HOW GRADING SHEET

What + How = WOW.
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CSR Name _____

Cross Grader Name _____

Caller Name _____

Date _____

ITEM	Self Grade	Cross Grade	COMMENTS
Product Knowledge			
Excellent product knowledge	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Communication of Expectations	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Clear presentation of the options	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Only communicate what the prospect/client needs to make a decision	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Being able to provide written support material to back up your conversation	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
How to communicate			
Exude confidence	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Customer-friendly CSR process	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
SMILE Factor	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Pace	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Enunciation	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Proper use of pronouns (I, we, they)	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Reference to prospect/clients name (at least 2x)	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Ask questions	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Listen	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Avoid Jargon	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Warm & Fuzzies	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Summarize & Conclude	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	

ITEM	Self Grade	Cross Grade	COMMENTS
Overall Objectives			
Did you WOW the Client The Overall Grade	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Did you Increase level of <u>customer satisfaction?</u>	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Did you insure that they want to <u>use us now and in the future?</u>	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Does the client perceive <u>value</u> in working with us?	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Do you understand the prospect/client's <u>needs?</u>	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Did you determine the <u>most appropriate</u> products/services based on their needs?	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Does our clients <u>understand their options?</u>	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Does our clients <u>know</u> the various products and services we offer?	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Did you find <u>Opportunities</u> to increase value, business opportunities, sales, and level of customer satisfaction?	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	
Did you develop client's <u>trust</u> in YOU?	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10	

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