

Self Assessment (1)

Connectivity	Metric	Dealer Action
How many times did the phone ring before it was answered?	<input type="checkbox"/> Under 4	
	<input type="checkbox"/> 4+	
How was Caller greeted?	<input type="checkbox"/> Phone Tree	
	<input type="checkbox"/> Live answer	
If phone tree present, how many options until Caller pressed # to connect	<input type="checkbox"/> #:	
	<input type="checkbox"/> No Phone Tree	
What was Caller stated reason for the call?	<input type="checkbox"/> Agent by name	
	<input type="checkbox"/> Specific product	
	<input type="checkbox"/> Specific department	
If Receptionist present, what was the initial communication?	<input type="checkbox"/> Immediate transfer	
	<input type="checkbox"/> Hold while I check and Agent unavailable	
	<input type="checkbox"/> Hold while I check and Agent available, warm transferred?	
	<input type="checkbox"/> There was no receptionist	
Was Caller placed on hold?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
Was the hold time less than 30 seconds?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
	<input type="checkbox"/> No hold time	
Did the Caller reach the intended place?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
At any time did the Caller need to route back to the Operator?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
Agent Skill	Metric	Dealer Action
Did you introduce yourself professionally with a friendly tone?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
Did you confirm vessel of interest?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
Did you ask questions to develop rapport?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	

Self Assessment (2)

Agent Skill (cont'd)	Metric	Dealer Action
Did the Caller provide you with their contact information?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
Were you able to answer the Caller's questions?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
If you had to call the Caller back was it due to:	Check all that apply:	
	<input type="checkbox"/> Specific Availability (Used)	
	<input type="checkbox"/> General Availability (New)	
	<input type="checkbox"/> Product	
	<input type="checkbox"/> Feature	
	<input type="checkbox"/> Pricing	
	<input type="checkbox"/> Financial	
	<input type="checkbox"/> Other:	
Were you transparent when telling the Caller that you would need to call them call back?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
Did you attempt to set an appointment?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
	<input type="checkbox"/> N/A	
If an appointment was set, was it initiated by you or the Caller?	<input type="checkbox"/> Agent	
	<input type="checkbox"/> Caller	
If an appointment was set, was it firm or soft?	<input type="checkbox"/> Firm	
	<input type="checkbox"/> Soft	
If you were calling a dealership and had the same experience as this Caller, would you do business with the dealership? 0 = would never 10 = most definitely! If less than 10, what is one improvement that would be move your score closer to a 10?	0 - 10	

Self Assessment (3)

Agent Skill (cont'd)	Metric	Dealer Action
What should you do more of when interacting with Callers?		
What should you do less of when interacting with Callers?		
Other		

Scoring

Give yourself a point for every "YES" on the **BOLDED** questions above

Score 12+: Top Performer!

Congratulations your phone performance handling and skills is exceptional. Keep up the great work!

Score: 7-11: Among the Pack

You are on par with industry averages, Visit zenithdealersolutions.com to download our best practices, view coaching videos, and sign up for free live webinar training. For a 30 day free benchmarking study and report, sign up at blog.zenithdealersolutions.com

Score: Less than 7: Below Average

You have some work to do to improve your Callers' experience. zenithdealersolutions.com to download our best practices, view coaching videos, and sign up for free live webinar training. For a 30 day free benchmarking study and report, sign up at blog.zenithdealersolutions.com