

## Self Assessment (1)

Connectivity	Metric	Dealer Action
Are lines published correctly and routed correctly?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
Are hours published correctly on Dealer website, Google, Yelp?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
Are missed calls captured and categorized?	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No	
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"/> IVR	
	<input type="checkbox"/> Live answer	
If IVR present, how many options until Caller pressed # to connect?	<input type="checkbox"/> #:	
	<input type="checkbox"/> No IVR	
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	

## Self Assessment (2)

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 vehicle 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	
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:	<b>Check all that apply:</b>	
	<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:	
<input type="checkbox"/> Did not have to call back		
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	

## Self Assessment (3)

Agent Skill (cont'd)	Metric	Dealer Action
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 no, what is one improvement that would be move your score closer to a 10?	0 - 10  #:	
What should you do <b>more</b> of when interacting with Callers?		
What should you do <b>less</b> of when interacting with Callers?		
Other		