

JILLS OFFICE FREEDOM FORMULA

RECEPTIONIST AUDIT SCORECARD



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This is the audit scorecard that we use at Jill's Office to evaluate the quality of our Jill calls.

Please feel free to modify and make it your own in order to fit your business and core values.



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Receptionist Audit Scorecard

Employee:

Auditor:

GREETING	POINTS POSSIBLE
Greeted warmly and said company name and your personal name	1
Said you're on a recorded line	1
TOTAL:	2
GATHERING	
Name	6
Best Phone Number	6
Email	6
Address	6
How they heard about us	1
Custom questions gathered	5
All other necessary information given or collected	6
TOTAL	36

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Audit Scorecard

Employee:

Manager:

VERIFYING INFORMATION - VERIFY = EVERY LETTER AND NUMBER REPEATED	
Name	5
Number	5
Email	5
Address	5
Purpose of call	5
TOTAL	25
OFFER TO SCHEDULE	
Proactively offer to schedule (whenever applicable)	5
TOTAL	5
SUMMARIZE	
Verify Appointment Date/Services & Price (if applicable)	5
TOTAL	5

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Audit Scorecard

Employee:

Manager:

END THE CALL PHRASE	
Thank customer for calling	1
TOTAL	1
NOTES FROM CALL	
Spelling/grammar	1
Who, What, When, Where, Why	5
What actions were taken/what the caller expects	1
Offer to call back (when applicable)	1
Notes match the call	5
TOTAL	13

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Employee:

Manager:

WOW EXPERIENCE	
Remained confident throughout the call	1
Customer Service - Proper tone of voice throughout the call, Empathetic, Friendly, Patient, and Attentive	10
Did not use "I don't know" or "I'm not sure"	1
Avoided long silences (if pause is necessary - explain why you are being silent momentarily)	1
TOTAL	13
GRAND TOAL	100

Total Score out of 100:

Additional comments: