

JILLS OFFICE FREEDOM FORMULA

**30,60,90 DAY CHECK-
IN +MONTHLY
MANAGER 1:1**

JILLS OFFICE FREEDOM FORMULA

This is our manager 1:1 format that we use at Jill's Office to evaluate job performance on a monthly basis. Please feel free to modify and make it your own in order to fit your business and core values.

JILLS OFFICE FREEDOM FORMULA

30 Day Check-In Questions

Employee:

Start Date:

Eval. Date:

Manager:

1. So far is the job what you expected? Are you feeling challenged? Or are you bored? Pushed out of your comfort zone?
2. Do you feel you have the information, tools, and resources you need to do your job successfully? Are you feeling welcomed by other staff members?
3. Are you experiencing any challenges in particular that we can assist you with?
4. Are you feeling comfortable within the organization in general? Do you feel like you have a good understanding of your role within the organization?
5. Do you feel you are able to be productive and effective in your position? Can you discuss why or why not?
6. Is there any specific training that you feel you need to be successful? Is there any way the onboarding process could be improved?
7. Do you feel you are receiving enough feedback and assistance from me? Are you finding the onboarding plan helpful in assisting you in meeting various milestones in your job?
8. Have you completed your harassment course?

JILLS OFFICE FREEDOM FORMULA

30 Day Manager Check-In Questions

Employee:

Start Date:

Eval. Date:

Manager:

1. Time/Attendance: following rules, understanding processes

2. Ready to advance into scheduling?

3. Communicating when necessary in Slack and emails?

4. Audit score:

5. Call Reports (Time between calls, AI time, etc) over the last 30 days:

6. Goals for the next 30 days

7. Suggestions/comments?

8. Have they completed their harassment course?

JILLS OFFICE FREEDOM FORMULA

60 Day Check-In Questions

Employee:

Start Date:

Eval. Date:

Manager:

1. What areas/tasks/projects are you enjoying the most within your position? Are there any new skills that you feel you have developed or strengthened? Are there any skills you would like the opportunity to develop more in the upcoming weeks and months?
2. What areas of the position are you not enjoying as much? What can we do to assist with making this better?
3. How is onboarding going? Are there any areas where you feel you could benefit from additional support or training? So far, what part of the onboarding process has been the most effective /beneficial?
4. Have you had a chance to complete your vision board?
5. Goals/additional training for the next 30 days?

JILLS OFFICE FREEDOM FORMULA

60 Day Manager Check-In Questions

Employee:

Start Date:

Eval. Date:

Manager:

1. Time/Attendance: following rules, understanding processes
2. Communicating when necessary in Slack and emails?
3. Call reports (Time between calls, AI time, etc) is the Jill meeting standards?
4. Audit score:
5. Cross trained in any other area? If so, which area/position?
6. Review of previous 30 days goals?
7. Goals for the next 30 days?
8. Suggestions/comments?
9. Anything else discussed

JILLS OFFICE FREEDOM FORMULA

90 Day Check-In Questions

Employee:

Start Date:

Eval. Date:

Manager:

1. What areas/tasks/projects are you enjoying the most within your position? Are there any new skills that you feel you have developed or strengthened? Are there any skills you would like the opportunity to develop more in the upcoming weeks and months?

2. What areas of the position are you not enjoying as much? What can we do to assist with making this better?

3. How is onboarding going? Are there any areas where you feel you could benefit from additional support or training? So far, what part of the onboarding process has been the most effective /beneficial?

4. Questions/suggestions?

5. Goals for the next 3 months?

JILLS OFFICE FREEDOM FORMULA

90 Day Manager Check-In Questions

Employee:

Start Date:

Eval. Date:

Manager:

1. Time/Attendance: following rules, understanding processes
2. Call reports(Time between calls, AI time, etc) is the Jill meeting standards?
3. Audit score:
4. Advanced into scheduling? If so, which pods, for how long, and how well does the Jill/JO understand the calendar(s)?
5. Review of previous 30 days goals?
6. Goals for the next 3 months?
7. Suggestions/comments?
8. Anything else discussed

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Monthly One on One

Employee Name:

Date:

Month:

WOW:

Audit Scores:

Numbers

Attendance:

Goals

-
-
-
-
-
-

Communicating when necessary via email and slack?

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Monthly One on One

Audit Call

Company Name:

Pod:

GREAT:

IMPROVEMENT:

Questions/Comments

- What is one thing that I currently do that you'd like me to continue to do?

- What is one thing that I don't currently do frequently enough that you think I should do more often?

- What can I do to make you more effective?

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INTERVIEW SCORECARD



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This is a scorecard that we use at Jill's Office to evaluate those interviewing for a position here. Please feel free to modify and make it your own in order to fit your business and core values.

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How punctual was the applicant?

1 2 3 4 5 6 7 8 9 10

Is the applicant dressed to impress?

1 2 3 4 5 6 7 8 9 10

How friendly is the applicant?

1 2 3 4 5 6 7 8 9 10

How confident is the applicant?

1 2 3 4 5 6 7 8 9 10

How professional is their tone of voice?

1 2 3 4 5 6 7 8 9 10

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How enthusiastic do they seem?

1 2 3 4 5 6 7 8 9 10

How comfortable are they with technology?

1 2 3 4 5 6 7 8 9 10

How much of a team player are they?

1 2 3 4 5 6 7 8 9 10

How GROWTH minded are they?

1 2 3 4 5 6 7 8 9 10

How much will-power do they have to do hard work?

1 2 3 4 5 6 7 8 9 10

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Would I feel confident with this person being a client's first impression of my business?

1 2 3 4 5 6 7 8 9 10

Would I feel confident with this person meeting clients in person?

1 2 3 4 5 6 7 8 9 10

Would I feel confident with this person being professional enough to represent my business?

1 2 3 4 5 6 7 8 9 10

Would I feel confident with this person being friendly/warm to represent my business?

1 2 3 4 5 6 7 8 9 10

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Would I feel confident with this person working productively with minimal supervision?

1 2 3 4 5 6 7 8 9 10

Would I feel confident with this person fitting in with the culture of our team?

1 2 3 4 5 6 7 8 9 10

Would I feel confident with this person putting out fires 60–70% of every day and staying positive?

1 2 3 4 5 6 7 8 9 10

Would I feel confident with this person being able to creatively problem solve to make our services work for the client and Jill's Office?

1 2 3 4 5 6 7 8 9 10

AUDIT SCORECARD

Employee: Jill Smith

VERIFYING INFORMATION	
Name	
Number	
Email	
Address	
Purpose of call	
TOTAL	25

OFFER TO SCHEDULE	
Proactively offer to schedule (with 15 min. prep)	5
TOTAL	5

SUMMARY	
Verify Appointment Date/Service	5
TOTAL	5

AUDIT SCORECARD

Receptionist Audit Scorecard

This is the audit scorecard that we use at Jill's Office to evaluate the quality of our calls.
Please feel free to modify and make it your own to fit your business needs and core values!

Customer Service Representative:

Auditor:

Greeting	Points Possible	Points Earned
Greeted warmly; said company name and your personal name	1	
Stated you're on a recorded line	1	
TOTAL:	2	
Gathering Caller's Information		
Name	5	
Best Phone Number	5	
Email	5	
Address	5	
How they heard about us	1	
Custom questions gathered	5	
All other call instruction are addressed as needed	5	
TOTAL	31	

Customer Service Representative:

Auditor:

Verifying Information - Every letter and number repeated and verified	Points Possible	Points Earned
Name	5	
Number	5	
Email	5	
Address	5	
Check and verify past notes (if applicable)	5	
TOTAL	25	
Offer to Schedule		
Proactively offer to schedule (whenever applicable)	5	
TOTAL	5	
Summarize and End the Call		
Verify Appointment Date/Services & Price (if applicable)	5	
Thank customer for calling before ending the call	1	
TOTAL	5	

Audit Scorecard

Employee:

Manager:

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	
WOW Experience		
Remained confident throughout the call	3	
Hear a smile in your greeting	2	
Eagerness to help displayed through out the call	3	
Proper tone of voice throughout the call	3	
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	

Employee:

Total Score out of 100:

Additional comments: