

Logged in as : Leanne Gabinelli ID:16

Logout

Reports | Monitor Form | User Manager | Active Scripts

Monitor Form | Archive Monitor Form | Add Monitor Form

Add Monitor Form Manager

Campaign : -- Select --
 Call Type : -- Select --
 Call Center : -- Select --
 Monitoring Date : 11/26/2013
 Agent Name :
 Agent ID :
 Media type : -- Select --
 Product Being Sold : -- Select --
 Talk Minutes :
 Talk Seconds :
 Sales Status : -- Select --
 Customer Name :
 Call ID/TMS ID :
 Call Date : 11/26/2013
 Monitored By : Leanne Gabinelli
 Recording URL :

Compliance Pass/Fail	: FAIL
Points Possible	: 100
Points Earned	: 0
Total Score	: 0%

SAMPLE EVTech DASHBOARD

Introductory Requirements	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>	Totals	Points Possible
Appropriate Caller Identification	<input type="radio"/>	0	<input type="radio"/>	0	4
Call Recording Notice	<input type="radio"/>	0	<input type="radio"/>	0	4

Remove for EVTech

General Communication Skills	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>	Totals	Points Possible
Conversational Tone	<input type="radio"/>	0	<input type="radio"/>	0	4
Communicates Clearly	<input type="radio"/>	0	<input type="radio"/>	0	4
Professionalism	<input type="radio"/>	0	<input type="radio"/>	0	4
Respectful	<input type="radio"/>	0	<input type="radio"/>	0	4
Active Listening Skills	<input type="radio"/>	0	<input type="radio"/>	0	4
General Product Knowledge	<input type="radio"/>	0	<input type="radio"/>	0	4
Answers Questions Accurately/Truthfully	<input type="radio"/>	0	<input type="radio"/>	0	4

General Presentation Skills

Specific Product Info	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>	Totals	Points Possible
Product Description <i>Description of Seminar</i>	<input type="radio"/>	0	<input type="radio"/>	0	4
Time Requirements (ex: hours/week)	<input type="radio"/>	0	<input type="radio"/>	0	5
Clearly describes financial requirements	<input type="radio"/>	0	<input type="radio"/>	0	5
Program Price (Aggressive, Moderate, Conservative)	<input type="radio"/>	0	<input type="radio"/>	0	5
Financing	<input type="radio"/>	0	<input type="radio"/>	0	5

Program Info.

Red Flags	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>	Totals	Points Possible
Express Earnings Claims	<input type="radio"/>	0	<input type="radio"/>	0	5
Implied Earnings Claims	<input type="radio"/>	0	<input type="radio"/>	0	5

Prior Customer Success Stories/Testimonial Claims	<input type="radio"/>	0	<input type="radio"/>	0	<input type="radio"/>	0	5
Earnings Disclosure	<input type="radio"/>	0	<input type="radio"/>	0	<input type="radio"/>	0	5
Selective Enrollment	<input type="radio"/>	0	<input type="radio"/>	0	<input type="radio"/>	0	5
Qualification	<input type="radio"/>	0	<input type="radio"/>	0	<input type="radio"/>	0	5
Sales Pressure	<input type="radio"/>	0	<input type="radio"/>	0	<input type="radio"/>	0	5
Enrollment Urgency	<input type="radio"/>	0	<input type="radio"/>	0	<input type="radio"/>	0	5

0 100

Notes:

Follow Up:

Follow-Up Needed ? Yes No

Results:

Results Key (based on monitoring score:
90% - 100% Positive-Praise
79% - 89% Needs Improvement
0% - 78% FAIL

Add Monitor Form
Cancel