



# CALL EXPERIENCE EVALUATION

Practice Name: \_\_\_\_\_ Team Member: \_\_\_\_\_

Date of Call: \_\_\_\_\_ Time of Call: \_\_\_\_\_

## Phone Answering (3 Points)

- ☐ Answered promptly (within 3 rings) (+3 points)
- ☐ Delayed response (4+ rings) (+2 points)
- ☐ Sent to voicemail (0 points)
- ☐ Placed on hold | Duration on hold (if applicable): \_\_\_\_\_ seconds (-1 point)

## Appointment Availability (3 Points)

- ☐ Scheduled within 72 hours (ideal) (+3 points)
- ☐ Scheduled beyond 72 hours (+1 point)
- ☐ No availability offered (0 points)

## Scheduling Coordinator Evaluation (10 Points)

- ☐ Gathered appropriate data & verified name spelling (+1 point)
- ☐ Used appropriate greeting & shared their name with the caller (+1 point)
- ☐ Validated the office and/or doctor(s) (+1 point)
- ☐ Validated caller's main concern (+1 point)
- ☐ Asked if anyone else in the family needs an exam now or future (+1 point)
- ☐ Successfully scheduled an additional family member (if applicable) (+1 point)
- ☐ Asked about treatment preference (braces or aligners) (+1 point)
- ☐ Found out who referred the caller (+1 point)
- ☐ Included a trial close (mentioning same day start option) (+ 1 point)
- ☐ Offered to schedule an appointment (+1 point)

**Professionalism & Demeanor (4 Points)**

- ☐ Upbeat and enthusiastic (+1 point)
- ☐ Helpful and patient (+1 point)
- ☐ Professional tone and language (+1 point)
- ☐ Clear and articulate communication (+1 point)
- ☐ Minimal to no background noise (0 points, subtract 1 point if excessive noise)

**OVERALL SCORE: \_\_\_\_\_ / 20****Areas of Excellence:**

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**Areas to Continue to Develop:**

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**Additional Notes:**

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**Next Steps:**

- ☐ Follow-up training recommended
- ☐ Additional coaching session suggested
- ☐ Recognize SC for outstanding service

Evaluator Name: \_\_\_\_\_ Evaluator Signature: \_\_\_\_\_