



# Individual Performance Evaluation



## Telephone Performance ANALYSIS<sup>SM</sup>

APPROPRIATE GREETING	WEIGHT
1.1. Did the agent open the call appropriately?	1
1.2. Did the agent attempt to obtain customer's phone number in case they get disconnected or for future communications?	5
<b>NEEDS ANALYSIS (Qualifying and Selling)</b>	
2.1. Did the agent inquire about the customer's current provider?	6
2.2. Did agent ask discovery questions to best determine the customer's programming and equipment needs?	6
2.2a. Did the agent provide any value statements to the customer?	1
2.2b. Were value statements presented appropriately to the customer's situation and needs?	4
2.3. Did the agent ask if the customer rents, owns the property and/or is part of a homeowners association? If caller does, did the agent ask the customer if they have permission to install DIRECTV?	5
2.4. Did the agent ask permissions to run customer's Social Security number for a credit check?	8
2.5. All you need to set up today is (\$XX). To secure your order and set up Automatic Bill Payments, which debit or credit card would you like to use today?	8
2.6. Did agent ask for customer's email address and explain they will receive further communications on how to enjoy DIRECTV to the fullest, and that an order confirmation will be sent via email providing programming/promotional information. "What email address would you like to use?"	5
2.7. If the agent closed the sale, did they schedule an installation date?	1
2.8. If the agent closed the sale, did they confirm/review all the order details?	1
<b>CUSTOMER SERVICE, RETENTION AND CHURN PREVENTION</b>	
3.1. Did the agent use a professional tone and pace?	6
3.2. Did the agent actively listen throughout the call?	6
3.3. Did they effectively overcome objections if applicable?	6
3.4. Did the agent explain how customers can save money by referring a friend?	0
<b>CLOSING CONFIRMATION</b>	
4.1. Did the agent read all appropriate Terms & Conditions?	8
4.2. Did the agent close the call appropriately?	1
4.3. Did the agent take an assumptive approach throughout the call?	8
4.4. Did the agent ask for the sale?	8
4.5. Did the agent close the sale?	6
4.6. Did the customer ask to call the dealer back?	0
<b>COMPETITION</b>	
5.1. Did the agent bring up Dish Network during the conversation?	0
5.2. Did the agent bring up any competitors during the conversation? (reference competitive list)	0
5.3. Did the agent position Dish Network services as a better or less expensive option?	0

NAME \_\_\_\_\_

EMPLOYEE CODE \_\_\_\_\_



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5.4. Did the agent sell a Dish Network subscription on the call?

0

**TOTAL**

**100**



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Performance  
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NAME

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