

DOR Agent Customer Interaction Scorecard



Agent Name:		Date of Interaction:	
Customer Entity ID:		Time of Interaction:	
Monitored by:		Skill Set	

Standards: minimum level of performance

Greeting & Build Trust	Yes	No	N/A	Comments/Notes/Suggestions
Identified agency /work unit				
Identified self				
Used caller's name appropriately				
Offered to help (introductory clause)				

Customer Verification/Ask Identifying Questions	Yes	No	N/A	Comments/Notes/Suggestions
Name				
Entity ID				
POA Verified				
Address				
Telephone number & type				
Asked for e-mail address				

Heart of Call	Yes	No	N/A	Comments/Notes/Suggestions
Asked open-ended questions				
Asked confirming question & determined reason for interaction				
Encouraged full compliance				

The Solution with Choices	Yes	No	N/A	Comments/Notes/Suggestions
Provided the solution with choices				
Addressed the reason for interaction				
Maintained control of the entire interaction				
Informed customer of error(s) discovered				
Described what action(s) were taken to correct error				
Asked for payment in full: bank draft or credit card				
Asked for down-payment or kept partial garnishment as a down-payment				
Initial Payment plan offer was higher than the minimum requirement				
Gained caller's cooperation				

Conclusion/Documentation	Yes	No	N/A	Comments/Notes/Suggestions
Recapped and provided what's next				
Asked, "Have I addressed your questions or concerns/Is there anything else?"				
Logged tax management note(s) per policy				
Logged info in other databases per policy				

Conclusion/Transferred	Yes	No	N/A	Comments/Notes/Suggestions
Informed customer of transfer				
Explained why transfer is needed				
Correctly transferred the customer				

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Expectations: achieving Blue Chip Service

Blue Chip Service	1	2	3	4	Comments/Notes/Suggestions
Acknowledged caller's concern					
Stated the reason for placing customer on hold					
Thanked the customer for holding/waiting					
Checked back within 2 minutes and ask customer to continue holding					
Used professional tone of voice					
Maintained professional behavior					
Used active listening and did not interrupt customer					
Educated/Advised customer on what to do in the future					
Promoted e-Services					
Offered to register customer for e-Alerts					
Typed up notes during call					
Waited for customer to hang up					

Ratings: 1 = Needs Improvement 2 = Met Expectations 3 = Above Expectations 4 = Blue Chip Service

Comments

Overall Rating _____

Ratings: 1 = Needs Improvement 2 = Met Expectations 3 = Above Expectations 4 = Blue Chip Service