

Personal Telephone Effectiveness Survey

To determine your level of service quality over the telephone, make copies of this worksheet and use it to monitor your phone conversations for one week. Several times a day, following calls, do a quick, honest self-analysis of your service delivery. After you receive a call and hang up, fill out one of the copies. Do this for at least seven days. At the end of that time, review your responses and look for patterns (positive and negative).

Number of rings before I answered _____

What greeting did I use (good morning, good afternoon, etc.)? _____

	Yes	No
<i>Did I give my:</i>		
<i>Name?</i>	_____	_____
<i>Organization's name?</i>	_____	_____
<i>Department's name?</i>	_____	_____
<i>Did I offer to assist?</i>	_____	_____
<i>If yes, how did I phrase the offer?</i>	_____	

<i>Did I listen actively? (using strategies from Chapter 5)</i>	_____	_____
<i>Did I use the caller's name frequently?</i>	_____	_____

<i>Did I use good communication techniques by:</i>		
<i>Speaking clearly?</i>	_____	_____
<i>Adjusting my rate of speech?</i>	_____	_____
<i>Adjusting my volume?</i>	_____	_____
<i>Using correct grammar?</i>	_____	_____
<i>Employing vocal variety?</i>	_____	_____
<i>Speaking in a conversational tone?</i>	_____	_____
<i>Smiling?</i>	_____	_____
<i>Pausing frequently?</i>	_____	_____
<i>Eliminating distractions?</i>	_____	_____

<i>Was I prepared?</i>	_____	_____
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<i>Did I use the telephone effectively by:</i>		
<i>Using the receiver or headset properly?</i>	_____	_____
<i>Transferring the call correctly?</i>	_____	_____
<i>Avoiding unnecessary holds?</i>	_____	_____
<i>Taking effective messages?</i>	_____	_____

<i>Did I handle the customer's need, complaint, or question effectively?</i>	_____	_____
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<i>Did I allow the customer to disconnect first?</i>	_____	_____
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