

# CIS Call Monitoring Tool



Date: \_\_\_\_\_ Monitor(s): \_\_\_\_\_ Information Specialist/POS Specialist: \_\_\_\_\_

Description of Interaction:

## Information Needs

Quality Indicators:

- Conducted appropriate needs assessment
- Provided correct information
- Tailored responses to caller's needs and questions
- Checked caller's understanding
- Explained technical terms
- Organized call appropriately

**Score:** \_\_\_\_\_

- 2 = Meets Expectations
- 1 = Needs Improvement
- 0 = Unacceptable

**Comments**

## Delivery

Quality Indicators:

- Credible
- Polite
- Established rapport with caller
- Empathetic

**Score:** \_\_\_\_\_

- 2 = Meets Expectations
- 1 = Needs Improvement
- 0 = Unacceptable

**Comments**

## Adherence to CIS Policy

Quality Indicators:

- Adhered to CIS policies
- Maintained scope of CIS service
- Followed CIS protocol(s)

**Score:** \_\_\_\_\_

- 2 = Meets Expectations
- 0 = Unacceptable

**Comments**

**Total:** \_\_\_\_\_

**Exceptional Service Provided to Caller:**      **Yes**

Exceptional skill demonstrated in meeting caller's information needs and/or in the manner of delivery. Examples: Handled complex call with exceptional skill; handled distraught/angry caller with great skill.

**Overall Rating Category**

- 6 = Meets Expectations
- 4-5 = Needs Improvement
- 0-3 = Unacceptable