

Phone Call Scorecard

Type of Call: NP RS CX Existing Field

1= None at all, 2= Minimal, 3=Average, 4=Really Good, 5= 100% Spot on

1. Friendly and cherry tone of voice - smile :)	1	2	3	4	5
2. Personal question or connection was made?	1	2	3	4	5
3. Funneled through option questions - do you prefer morning or afternoon?	1	2	3	4	5
4. Created solutions to actual problems - not perceived problems?	1	2	3	4	5
5. Didn't base call on insurance?	1	2	3	4	5
6. NP information was taken thoroughly? Referral source received.	1	2	3	4	5
7. Cancellation/reschedule call: offered two passes before canceling? "What's going on?"	1	2	3	4	5
8. Empathy was shown?	1	2	3	4	5
9. Tone matching was appropriate?	1	2	3	4	5
10. NP/pain call was scheduled within 24-48 hours?	1	2	3	4	5
11. Scheduler dazzled and left a positive, exceptional impression on the patient?	1	2	3	4	5
12. Listened to patient and their concerns, documenting these appropriately?	1	2	3	4	5