



# Phone Professionalism Evaluation Worksheet

For Individual Coaching Session  
NOTE: You should evaluate only one skill per phone call  
(1 is "Terrible" 10 is "Exceptional")

## **1. Listening**

How well am I listening? (Reflect Answers, No Assumptions, Relevant Questions, Appropriate Responses)

1    2    3    4    5    6    7    8    9    10

What is one specific thing I can focus on? \_\_\_\_\_

## **2. Tempo**

How well am I matching customer's pace and tempo while also "deescalating" as needed?

1    2    3    4    5    6    7    8    9    10

What is one specific thing I can focus on? \_\_\_\_\_

## **3. Commitment**

What is the level of commitment I show in meeting customer needs? (Sincere, Persistent, Focused)

1    2    3    4    5    6    7    8    9    10

What is one specific thing I can focus on? \_\_\_\_\_

## **4. Building a Relationship**

How well am I building a relationship of trust & confidence? (Polite, Confident, Honest, Professional)

1    2    3    4    5    6    7    8    9    10

What is one specific thing I can focus on? \_\_\_\_\_

## **5. Effective Use of Kb and Other Resources**

How well am I utilizing available resources? (Searches Kb, Captures Info, Organized)

1    2    3    4    5    6    7    8    9    10

What is one specific thing I can focus on? \_\_\_\_\_

## **6. Buying Signals**

How well am I recognizing and responding to customer buying signals?

1    2    3    4    5    6    7    8    9    10

What is one specific thing I can focus on? \_\_\_\_\_

## **7. Answering Questions**

How well am I answering customer's questions and concerns? (Clear, Concise, Relaxed, Honest)

1    2    3    4    5    6    7    8    9    10

What is one specific thing I can focus on? \_\_\_\_\_

## **8. Voice Quality**

How well am I managing voice quality? (Warmth, Energy, Volume, Clarity)

1    2    3    4    5    6    7    8    9    10

What is one specific thing I can focus on? \_\_\_\_\_

Average of Ratings =