

## Caller Evaluation Form

*This form provides a guideline for the evaluator to use while critiquing a Telephone Associate's call. Callers should use this form as a reference during his/her shift to ensure that each call is made properly.*

Caller's Name: \_\_\_\_\_ Station #: \_\_\_\_\_  
 Evaluator's Name: \_\_\_\_\_ Time of Call: \_\_\_\_\_  
 Day of Week: \_\_\_\_\_ Date: \_\_\_\_\_  
 Call Details: \_\_\_\_\_

| Total   | Parts of the Call  | Comments |
|---------|--|----------|
| ___/___ | <b>1. Ask for the Donor</b><br><br>___ Asked for the prospect by the proper name<br>___ If not home, asked when we could call back   |          |
| ___/___ | <b>2. Introduce Yourself</b><br><br>___ Caller used his/her name<br>___ Mentioned that he/she was a student<br>___ Mentioned major or class year<br>___ Mentioned UNC<br>___ Enthusiastic  |          |
| ___/___ | <b>3. Tell why you're calling</b><br><br>___ Clearly explained the purpose of the call   |          |
| ___/___ | <b>4. Verify prospect records</b><br><br>___ Updated home address including zip<br>___ Updated business information<br>___ Asked for an e-mail address   |          |
| ___/___ | <b>5. Ask for comments and establish rapport</b><br><br>___ Asked for comments or questions<br>___ Asked about alumni association info<br>___ Discussed UNC<br>___ Created a dialogue<br>___ Listened/Responded well<br>___ Answered questions knowledgeably<br>___ Did not rush |          |
| ___/___ | <b>6. Make transition to the ask</b><br><br>___ Smooth, did not change tone of call  |          |
| ___/___ | <b>7. Thank the prospect for past support</b><br><br>___ Referred back to purpose of call  |          |
| ___/___ | <b>8. Make the case</b><br><br>___ Provided general information<br>(\$ or participation goal)<br>___ Ask prospect to support this goal   |          |

1 = Included this item  
 0 = Did not do this item  
 N/A = this item is not applicable to the call

|         |  |  |
|---------|--|--|
| ___/___ | <b>9. Ask for gift</b><br><input type="checkbox"/> Used giving circle name<br><input type="checkbox"/> Asked for specific amount<br><input type="checkbox"/> Asked for appropriate amount<br><input type="checkbox"/> Mentioned any special match offers<br>(scholarships)   |  |
| ___/___ | <b>10. Wait for answer</b><br><input type="checkbox"/> Quietly waited for prospect to answer   |  |
| ___/___ | <b>11A-C. Dealing with objections</b><br><input type="checkbox"/> Offered different payment options<br><input type="checkbox"/> Offered a different amount<br><input type="checkbox"/> Discussed participation<br><br><input type="checkbox"/> Persistent, not pushy<br><input type="checkbox"/> Understanding of the prospect's concerns  |  |
| ___/___ | <b>11D. Closing (Refusal)</b><br><input type="checkbox"/> Said thank you<br><input type="checkbox"/> Tied back into rapport<br><input type="checkbox"/> Let the prospect hang up first   | (Include outcome of call)  |
| ___/___ | <b>12. Closing (Pledge)</b><br><input type="checkbox"/> Said thank you<br><input type="checkbox"/> Asked about matching gifts<br><input type="checkbox"/> Asked for credit card properly<br><input type="checkbox"/> Confirmed credit card number<br><input type="checkbox"/> Confirmed amount<br><input type="checkbox"/> Tied back into rapport<br><input type="checkbox"/> Sounded sincerely appreciative of the prospect's support<br><input type="checkbox"/> Let the donor hang up first |  |
| ___/___ | <b>Overall Score for the Parts of the Call</b>   | _____ % of the call<br>was done correctly                                    |
| ___/___ | <b>Rating the Caller's Performance</b><br>(on a scale of 0-5)<br><input type="checkbox"/> General tone<br><input type="checkbox"/> Enthusiasm<br><input type="checkbox"/> Clear speech/Correct grammar<br><input type="checkbox"/> Professionalism<br><input type="checkbox"/> Knowledge   | You did great on:<br>_____<br>_____<br>You can improve on:<br>_____<br>_____ |

**Feedback Session**

Caller Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Evaluator Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Circle the caller's attitude toward the conversation: Positive Neutral Negative

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

1 = Included this item  
0 = Did not do this item  
N/A = this item is not applicable to the call