

DISCUSS PREVENTIVE CARE – Client Interaction Assessment

Employee _____ Client _____ Date _____

Thank you for agreeing to help us with our customer service training program. You will be working with one of our newer employees today. Please read over the chart below before you interact with our team member so that you are familiar with our assessment guidelines. Once you have said good-bye to the employee being evaluated, please fill out the form by circling one option for each of the 4 rows. Thank you!

	Poor	Needs Work	Good Job	What we're looking for!
1. Professional, willing demeanor	Appears rushed and/or looks disheveled. Is hesitant with answers or unable to answer questions. Manner causes me to question recommendations being made.	Appears happy and positive. Strong greeting, but becomes less confident as I ask questions. I am not 100% sure they are totally familiar with recommendations or my pet's situation	Professional, polite and self-assured. Does a good job and seems more interested in caring for me and my pet than in selling something. Provides reassurance that I am taking good care of my pet. I am comfortable working with this person.	Exceptionally confident & polite. Impeccable in appearance. Has a positive, "can-do" attitude. I never felt "sold." I really want to work with this person again. I totally trust these recommendations.
2. Develops Connection	Seemed disinterested in me and my pet – doesn't seem to even know our names or why we're here.	Attempted to relate to me but was a bit awkward or forced in this conversation.	I enjoyed talking with this employee. They used my name and my pet's name and engaged in enjoyable conversation with me. They were familiar with my pet's history and lifestyle. I remember their name.	I really bonded with this person – they knew details about my pet & used our names. They asked great questions to learn more about us. They were very reassuring.
3. Determined and addressed my needs	Seemed to be going through the motions and never provided any personalized care.	Employee seemed to want to care for my needs, but never specifically asked if I had any specific concerns, questions or needs. Recommendations seemed "canned."	I felt that all of my concerns and needs were addressed. Employee asked questions of me and made efforts to help in whatever way they could. My plan seemed personalized.	This employee seemed to intuitively know how to help me and also asked clarifying questions. I really felt cared for with individualized attention! I am very happy with the plan.
4. Strong Closure	I do not recall how we said good-bye	Employee said good-bye and even said good-bye to my pet	I remember something special in the good-bye: a touch to my shoulder or a phrase meant specifically for me.	Our farewell was personal, positive & reassuring. Both my pet and I were included in this memorable good-bye.

Please make any pertinent notes on the back of the page. Thank you!

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