

TEACHING A CLIENT TO ..... – 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!
<b>1. Professional, willing demeanor</b>	Appears rushed and/or looks disheveled. Is hesitant with answers or unable to answer questions. Manner causes me to question how much this person knows.	Appears happy and positive. Strong greeting, but becomes less confident as I ask questions. I am not 100% sure they are totally familiar with this process.	Professional, polite and self-assured. Does a good job and seems interested in helping me. Provides reassurance that I will be successful with this.	Exceptionally confident & polite. Impeccable in appearance. Provides much reassurance and has a positive, "can-do" attitude. I REALLY want to work with this person again.
<b>2. Develops Connection</b>	Seemed disinterested in me and my pet – doesn't seem to even know our names.	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.	I really bonded with this person – they knew details about my pet, used our names and asked about us – they seemed to really want to get to know us more, and seemed to personalize the training.
<b>3. Good teaching skills</b>	Seemed to be going through the motions – simply told me what to do & never demonstrated or let me try. I am not sure I am doing this right.	Employee seemed to want to teach me well, but was a bit awkward at times. May have failed to ask me if I had any questions. I think I get it, but could have used more detail.	Employee told me what to expect, demonstrated certain things and had me do part of the work in front of them to assure that I understood. I am know how to do this skill when I get home.	Excellent teacher and I feel confident that I know how to this skill. I really felt cared for with individualized teaching. I heard praise for both myself and my pet as we were learning. Very interactive.
<b>4. Strong Closure</b>	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.	I could feel a bit of a bond between the employee and me as they said good bye – they gave me some final reassurance & encouraged me to call them if I had any trouble

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

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