

Score _____

Mystery Shopping Form

Y=right

N=wrong

N/A=Not applicable (not applicable counts for a point on the 10 point scale.)

Person shopped _____

Date of call _____

Time of call _____

Phone number called _____

1. _____ Answered in 2-3 rings
2. _____ Identified name and department
3. _____ Used the customer's name at least once
4. _____ Offered to help: "How can I help you?"
5. _____ Put caller on hold properly
 - _____ asked permission and waited for answer
 - _____ left caller on hold 30-45 seconds maximum
 - _____ thanked caller for holding
6. _____ Didn't use the "n't" words (can't, won't, etc.) Stated what CAN do.
7. _____ Transferred caller properly
 - Only once
 - Introduced the two people
8. _____ Voice exuded confidence, competence, and care
9. _____ Closed with "Is there anything else I can help you with?"
10. _____ Thanked person for calling

Comments: