

Gold Eagle Services – Dispatcher/CSR Scorecard

Name:

Date:

Job Position:

Dispatcher / CSR

Purpose of This Job:
Mission Statement

We engineer healthy homes using trained and dedicated experts, who are passionate about delivering unbelievable service at an uncompromising value.

KPI Tracking

A+

B

C

F

Conversion Rate

>90%

85%

80%

<80%

On-Time Arrival Rate

>95%

90%

85%

<85%

Memberships

>20%

15%

10%

<10%

Documentation Accuracy

A+

B

C

F

Skills & Competencies

Actions To Take

Communication/Customer Service Skills

CRM - Literacy/Documentation

Appointment Scheduling Accuracy

Script Hit-Points

Strategic Thinking/Resourcefulness

Membership Presentation

First Call Resolution

Patience

Living Our Core Values

Actions To Take

Integrity: We exist to build an enduring company founded on trust and honesty. Our teammates, clients and partners can rely on us to do what we say we're going to do, in a timely manner.

Communication: We strive for proactive, consistent and transparent communication that minimizes friction between our team, our customers and creates & sustains healthy relationships.

Quality: We strive to develop motivated experts that are committed to deliver the highest standard of service in all areas of our business.

Dispatch / CSR Signature

Office Manager Signature

Next Scorecard Review Date: