

Gold Eagle Services – Service Expert Scorecard

Name:

Date:

Job Position:

Service Expert

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

Close Rate

>50%

50%

<40%>

<30%

Leads Turned

>25%

25%

N/A

<20%

Memberships

>30%

30%

<25%>

<20%

Average Ticket

>\$500

\$500

<\$400>

<\$300

Call Back Rate

<1%

<2%

<2%

>5%

Skills & Competencies

Actions To Take

Communication/Customer Service Skills

CRM - Literacy

CRM - Notes/Paperwork/Invoices

Skillset - Troubleshooting

Strategic Thinking/Resourcefulness

Sales Ability/Spiffs/Reviews

Membership Presentation

Ability to Set-Up Leads

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.

Service Expert Signature

Service Manager Signature

Next Scorecard Review Date: