



**Call Observation
Proposal**

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INTRODUCTION:

Our clients are looking for an independent company that has the training background to monitor and assess their staff members from a “consultant’s perspective”. Our experience and know how provides a viable solution ensuring your staff is handling calls that offers a more positive representation of your company. We can accommodate our your observation and secret shopper needs on a one time, daily, weekly, monthly and annual basis. No task is too big or too small. Our fee is based on the complexity and longevity of our contracts. Our service gives our clients peace of mind knowing that assessments and recommendations are in accordance to what is trained and expected of your staff.

*We Strive To Become A Seamless Extension To Your
Quality Assurance and Training Objectives!*

PROJECT OBJECTIVES

Our Call Observation/Secret Shopper Services are able to:

- Ensure call observation forms are custom fit for each of your observation requirement needs.
- Closely monitor all aspects of every call. The various types of monitoring client can choose from, such as:
 - Inbound (such as in a secret shopper format)
 - Outbound (either side by side monitoring and coaching methods or seeding the data-base with our contact names and numbers).
 - Remote monitor using either a barge in feature (client must have this feature)
 - Three way calling
 - Listening to digitally recordings.
- Ensure we monitor and observe every call accurately and consistently within the pre- determined guidelines set forth by the client and KSE.
- Offer recommendations such as, salesmanship, inbound and outbound customer servicing, handling inquires and converting them into viable leads, appointments or sales, voice projection, call handling techniques, objection handling, and defusing irate customers.

SERVICE OVERVIEW

- **Define Your Objectives**
- **Evaluate and Process Monitoring Forms**
- **When Requested by Client, We Can Offer The Following Recommendations and Services:**
- **Training on Inbound, Outbound, Sales, and Customer Service Call Handling Skills**
- **Objection Handling**
- **Voice Inflection and Style of Delivery**
- **Call Processes**
- **Scripting Platforms for Various Call Handling Processes**

Call Observation Outline

We offer three levels of Quality Call Observation /Secret Shopper Services. Each level has a different criteria base on the level of evaluation our clients want us to perform. The following is a break down of each level and our general specification requirements that help us customize our services to meet our client call observation/secret shopper needs. Our clients may add to or delete from the list below:

Level 1— KSE will Custom Design a form or client provides a check-off form. Forms are designed to determine staff's adherence to scripts, basic usage of techniques and minimal compliance issues. Level 1 is designed for the beginner who is limited in their skills and training. KSE will identify the following:

- **Voice Projection**
- **Style of Delivery**
- **Opening Statement (Greeting, Defining Caller's Objective, Offer to Assist, Hear Agent's Smile)**
- **Qualifying and Understanding The Caller's Needs**
- **Agent's Listening Skills**
- **Probing Effectiveness**
- **Basic Salesmanship**
- **Effectiveness of Overcoming Resistance and/or Caller's Objections**
- **Basic Up-Selling Attempt**
- **Control of Call**
- **Customer Service Etiquette**
- **Overall Closing Techniques and Handling Customer Responses**
- **Adherence to Internal Compliances (client provides a check list)**
- **Adherence to Do Not Call Compliances (if applicable)**
- **Overall Presentation**

Level 2— KSE will Custom Design a form or client provides a check-off form. Forms are designed to determine staff's adherence to scripts, intermediate usage of techniques and compliance issues. Level 2 is designed for the intermediate that has received complete training and been through Level 1 Observation. KSE will identify the following:

- **Voice Projection (tone, modulation, inflection)**
- **Style of Delivery (usage of words, pausing, pitch, formation, personality)**
- **Opening Statement (Greeting, Defining Caller's Objective, Offer to Assist, Hear Agent's Smile)**
- **Qualifying and Understanding The Caller's Needs**
- **Agent's Listening Skills**
- **Probing Effectiveness, having the ability to Qualify, Establish Wants and Create The Needs For The Your Offering Or Call Objective**
- **Think Out of The Box**
- **Intermediate Selling/Customer Servicing Techniques**
- **The Effectiveness of Overcoming Caller's Resistance and/or Objections**
- **Control of Call**
- **Customer Service Etiquette**
- **Overall Closing Techniques and Handling Customer Responses**
- **Adherence to Internal Compliances (client provides a check list)**
- **Adherence to Do Not Call Compliances (if applicable)**
- **Outbound Call Handling Processes (a more detailed description provided upon request)**
- **Getting Through the Secretarial Screening Procedures (outbound Business to Business applications only)**
- **Overall Presentation**

Call Observation Outline

Level 3— KSE will Custom Design a form or client provides a check-off form. Forms are designed to determine staff's adherence to scripts, advanced usage of techniques and compliance issues. Level 3 is designed for the advanced that has received complete training and been through Level 1 and 2 Observation. KSE will identify the following:

- **Voice Projection (tone, modulation, inflection)**
- **Style of Delivery (usage of words, pausing, pitch, formation, personality)**
- **Opening Statement (Greeting, Defining Caller's Objective, Offer to Assist, Hear Agent's Smile)**
- **Qualifying and Understanding The Caller's Needs**
- **Agent's Listening Skills and Comprehension Skills**
- **Probing Effectiveness, having the ability to Qualify, Establish Wants and Create The Needs For The Your Offering**
- **Think Out of The Box**
- **Advanced Selling Techniques**
- **The Effectiveness of Overcoming Caller's Resistance and/or Objections**
- **Advanced Up-Selling/Customer Service Techniques**
- **Control of Call**
- **Customer Service Etiquette**
- **Specific Use of Closing Techniques and Handling Customer Responses**
- **Adherence to Internal Compliances (client provides a check list)**
- **Adherence to Do Not Call Compliances (if applicable)**
- **Outbound Call Handling Processes (a more detailed description provided upon request)**
- **Getting Through the Secretarial Screening Procedures (outbound Business to Business applications only)**
- **Overall Presentation**

Call Observation Outline

CALL OBSERVATION/SECRET SHOPPER SET UP AND PROCESSING STEPS

STEP 1--PROJECT OVERVIEW AND DEVELOPMENT

- Conference with all Related Management (Client Assigned Project Manager and KSE Trainer and Consultant). Conference will determine project feasibilities, direction, expectations and requirements.
- If Applicable, Discussions on the Retrieval of Call Recordings
- Overview and Understanding of either Client Provided Evaluation Forms or KSE's Creation of the Forms
- Discuss the Process of How to Complete and Send Forms to Client
- Determine and Fine Tune Level of Observation (levels 1, 2 or 3)
- Recommendations and Other Proposed Options (optional upon client's request)

STEP 2--PRELIMINARY SET-UP

- Client Account Review and Set Up
- Call Observation Evaluation Forms Designed
- Forms Approved by Client
- Client Sign Off Project and Start Project Fulfillment

STEP 3-- PROJECT FULFILLMENT

- Call Observation/Secret Shopper Evaluation Calls Begin
- Ongoing Interaction Between Client and KSE
- Observations Completed
- Recommendations Made for Each Assessment
- Overall Assessment and Recommendations in Preparation for Hands On Training

STEP 4—TRAINING (optional)

- Schedule Training Sessions
- Custom Write Portions of Training Based on Observations
- Prepared Training Materials and Hand Outs
- Conduct Training Sessions
- KSE Overview of Training Effectiveness
- Provide Hands on Coaching and Training (optional)

STEP 5—RE ASSESSMENT (optional)

- Reassess Calls to Determine Adherence to Training
- Written Assessment Overview and Recommendations



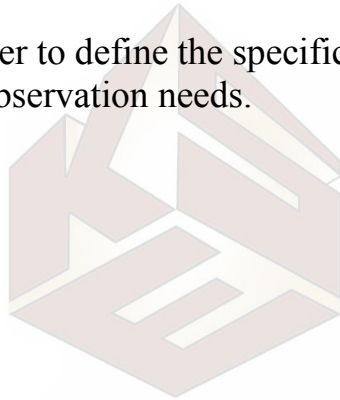
Next Steps

Retainer Fee Option:

Many of our clients prefer a longer term commitment to training and follow up for their sales and /or customer service departments. Therefore *Kathy Sisk Enterprises, Inc.* offers a retainer fee option. Included in the retainer fee option are several on site visits, virtual training, weekly follow-ups and ongoing consulting, report analysis and assessments. Please request a more detailed proposal.

Moving Forward:

Contact Kathy Sisk (President) in order to define the specific objectives for your center, and/or draft a customized proposal for your call observation needs.



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