

# Form 18 RSR Weekly Assessment

RSR Name  
RSR Email  
Date of Call

dd-MMM-yyyy

Duration of the call

\*

Customer's Name

First Name

Last Name

Did the RSR introduce them self and the company ?

-Select- Yes NO

Yes

Did the representative ask the required questions and provide customer engagement ?

-Select- Yes No

Yes

Was the quote provided with instructions on what is included in the cost, as well as company benefits and warranty issues?

-Select- Yes No

Yes

Did the RSR ask for the order ?

-Select- Yes No

Yes

If the RSR won the sale, did the representative verify address, phone number , email address, time and date of schedule ?

-Select- Yes No

Yes

If the customer did not want to book an appointment did the RSR tell the customer that they will email out a quote ?

-Select- Yes No Third Choice

Yes

Was the quote emailed out to the client ?

-Select- Yes No Third Choice

Yes

Did the email quote include the house details gathered during the sales call ?

-Select- Yes No

Yes

Was the correct email template used ( brand and address ) ?

-Select- Yes No

Yes

Did the RSR give the customers the 9 point talk about what to look for in a contractor before the call ended ?

-Select- Yes No

Yes

Was there follow up on the quote within 2 business days ?

-Select- Yes No

Yes

Was there buying signs in the call that the rep did not pick up on ?  
Suggestions on how the call could have been improved.  
Copy of call

Choose File

Upload file

Capture Audio

Capture Video

Rating

**SUBMIT**

Do not submit confidential information such as credit card details, mobile and ATM PINs, OTPs, account passwords, etc. [Report Abuse](#)

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