

Call Scoring Guide Sheet.

Did the agent quantify why they were offering the quote? Was it explained how a quote is built up? Did agent ask about finances, loans, children, mortgages, CIC/SIC?	(20%)
Did the agent introduce themselves?	(4%)
Did the agent make the customer aware of whom we are as a company? Is this unclear at any point?	(4%)
Did the agent clarify what cover the client has already?	(2%)
Did the agent thoroughly explain the type of product the customer was buying?	(2%)
Did the customer explain and offer CIC/SIC INDEXATION WAIVER	(10%)
Check spelling of surnames	(2%)
Check the date of birth	(4%)
Check smoker status and classify it correctly	(4%)
Check the spelling of the email address	(2%)
Did the agent ask if there was a policy number to replace if existing L&G policy? If not, did they correctly explain to customer that they would need to cancel their old policy	(4%)
Did the agent ask open questions without leading the customer?	(4%)
Were height ,weight, drug and alcohol confirmed correctly?	(3%)
Did the agent record the correct doctor's details? Specific consent for medical report access obtained?	(3%)
Did the agent ask all health questions in full?	(4%)
Were all health questions recorded correctly?	(4%)
If an old deal call back, did agent clarify all health questions again?	(2%)
Did the agent persuade the client to answer any questions in a non-compliant manner?	(2%)
Did the agent explain about trust correctly? Was a customer living in Scotland mis informed regarding trust?	(2%)
Did the agent read opening and closing legal sections on OLP?	(4%)

Did the agent consolidate the call, slowly and concisely so that the customer understood?
Leaving time for the customer to write things down? (10%)

Did the agent confirm the DD details and first payment dates? (2%)

Did the agent confirm with the customer what they would need to do when they got an email from L&G? Did they explain they would need to complete things online (4%)

AUTOFAILS:

- "Calls recorded for" statement not read
- Opening statements not read
- Closing statements not read
- APMS declarations not read in full
- Didn't consolidate call at the end
- Did not mention 48 hour process (when applicable)
- Customer mis-lead or mis-sold
- Incorrect trust information regarding TAX

Reason

why?.....
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Closer –

Client name -

Percentage score –

Scored by -