

Most of the contacts to Buckeye Link are by phones. This scorecard will help us evaluate and improve Counselor's phone skills in order to enhance the quality of our phone interactions. This tool will also help identify areas for improvement and training needs in our office.

### Scoring

Counselors can receive 100% by earning credit for each Foundation Skill and earning the score of 4 in each of the three competencies.

4.0 = 100%	Exemplary
3.3 or > = 95%	Exceeds
3.0 or > = 93%	Meets
2.9 or < = not passing	Needs improvement

- An average of **3.0** is expected to be maintained on each scorecard with a year-end average of at least a 3.0 by June 30.
- Assistant Directors will review and evaluate calls and emails on the following schedule:
  - **New counselors:**
    - Review 4 calls and 2 emails until counselor consistently achieves a 3.0 average and have 6 months experience
  - **Veteran counselors:**
    - Review 2 calls and 2 emails until counselor achieves 3.3 average and has 12 months experience (one full cycle)
    - Reduce number of calls and emails to 1 and 1 once counselor achieves a 3.3 average and has 12 months of experience. A rolling 3-month average will be used to calculate the percentage (e.g., a counselor receives 3.3 average based on three months' worth of data).
  - **Shadow buddies:**
    - Review 1 call or 1 email monthly
- If any *Foundation Skills* are missed, the call is rated *Unacceptable* and the counselor earns a non-passing score. If all Foundation Skills have been met, the score will equal the total of the percentages earned on all other steps.
  - Each non-Foundation Skill is weighted differently with emphasis on Customer Service and First Contact Resolution.
    - Customer Service 40%
    - First Contact Resolution 40%
    - Comments & Efficiency 20%
- To receive a 3.0, Counselors need to earn a score of 3 in each of the categories: Customer Service, First Contact Resolution and Control.
- If the average falls below the expected score (3.0), during multiple review periods, the Team Lead and Counselor will discuss the next steps for performance improvement.
- If a performance improvement plan is warranted, calls will be evaluated more frequently.

## Foundation Skills

*Mandatory points that must be achieved*

1. Looks up account in SIS and/or Salesforce and verifies three identifying factors (for all students who have applied)
  - *Refer to FERPA guidelines*
2. Releases information to appropriate party (SIR)
  - *For applicants, can speak to parent or guidance counselor*
  - *If party is not authorized, release general information. Refer to [FERPA Wiki page for additional information](#)*
3. Provides accurate information
  - *Counselor will only lose the point if the student's account is impacted academically or financially in a way that is irreversible. This includes incorrect information on SAP and Consortium deadlines, drop/withdrawal dates, census, etc.*
  - *If Counselor provided incorrect information, but followed up with the customer after the call (must be documented in Salesforce note or email), the Counselor can still receive credit*
4. Writes comment
5. Addresses all questions and concerns to the best of ability
  - *Answers all questions and if does not know the answer offers to research and follow up with caller*
  - *Transfers call appropriately to a department or office outside of Buckeye Link*

## Customer Service

*Scorecard Focus 1*

### Builds Rapport

1. Connects personally with caller
  - *This encourages counselors to connect with the caller by sharing their own relevant experiences, congratulate and encourage students and families through their successes, offer understanding and options through difficult times*

Examples:

  - *Congratulations on your acceptance, your new job, your upcoming graduation!*
  - *I'm sorry to hear you've been having a difficult time with your verification documents. I'd like to go over everything and help you understand what's needed*
2. Does not interrupt
  - *Exception: Caller has multiple concerns and provides detailed explanations before allowing the Counselor to answer. Counselor can interject by indicating "If you don't mind, I would like to follow along with you as you explain your situation. Can you please provide me with your student ID number so I can locate your account?"*
3. Uses Appropriate Greeting and Closing
  - *Closing should ensure that caller has no other questions unless caller has already confirmed*
4. Uses Caller's Name at least once
  - *Addresses caller by first name, Mrs., Mr., Ms., or Sir/Ma'am when appropriate*

### Delivery

1. Counselor is knowledgeable
  - *Navigates appropriate software fluidly*

- *Counselor demonstrates expertise and skills appropriate for current training level*
  - *Counselor demonstrates understanding of resources available to obtain information*
2. Clear and confident communication
    - *This includes avoiding jargon eg: "I'll put that on the REVI list to pull in your ISIR", or "I will put in a WNE to cancel your app" etc.*
    - *Sounds confident in answers, avoids passive language, and avoids excessive use of "ums", "ahhs"*
    - *Avoids telling caller an answer without successfully researching the issue causing the counselor to change their original answer thereby causing confusion*
    - *Counselor leads the call and explains as they go*
  3. Positive and professional tone

### Reciprocal Understanding

1. Asks probing questions
  - *In order to better understand the issue or to identify the reason for the call*
2. Exhibits active listening
  - *Counselor listens attentively, is conscious of caller's tone, assumes positive intent, and demonstrates patience*
3. Checks for understanding
  - *Both to clarify that the student understands what the counselor has said, but also that the counselor understands what the student is trying to convey to us*

### Customer Service Scoring Rubric

**0** Counselor gave advice that was incorrect or may have caused the student to take unnecessary/invalid actions. Counselor was dismissive, was not engaging, did not address the caller's questions, and/or had a disposition that escalated the situation.

**1** Counselor provided an explanation that was partially incorrect, irrelevant, or incomplete. Counselor seemed distracted or disengaged during part of the call. Counselor did not seek feedback confirming the caller understood their response.

**2** Counselor provided an explanation that was professional but somewhat unclear and left caller asking more questions, or counselor gave caller an answer without successfully researching the issue causing the counselor to change answer mid-conversation. Counselor did not seek feedback confirming the caller understood their response and/or was not engaged with the caller during the conversation.

**3** Counselor is knowledgeable, clear, and confident in their communication and is professional throughout the call. Counselor consistently engaged the caller during conversation and did not interrupt caller. Counselor sought and/or received feedback from caller indicating both that the counselor understood the reason for call, and that the caller understood the counselor's response.

**4** Counselor connected personally with the caller, their situation and was genuine in response. Counselor consistently engaged the caller during conversation. Counselor did not interrupt caller, used appropriate greeting and closing, and used caller's name/title at least once in the call. Counselor is knowledgeable, clear, and confident in their communication and is professional throughout the call. Counselor sought and/or received feedback from caller indicating both that the counselor understood the reason for call, and that the caller understood the counselor's response.

## First Contact Resolution

Scorecard Focus 2

### Ownership

1. Follows up when appropriate
  - *Within 1-2 business days*
2. One University
  - *Escalates appropriately*
  - *Refers to Case Management when needed*
  - *Counselor follows through eg: adds to REVI/BAR/RAR etc.*
  - *Offers to be point of contact*
  - *Admissions counselor as appropriate*
  - *Using 'we' instead of 'they' when referring to stakeholder offices*
  - *Works with other offices to resolve issues as necessary*

### Holistic Review

1. Reviews account
  - *Helps catch issues that are unknown by the caller, but could cause future problems for the student and future contacts to our office*
2. Reads comments
3. Reviews and discusses TDL and holds with student

### Future Focus

1. Educates caller to be self-sufficient
  - *Educates caller on processes and navigation to ensure the caller does not have to contact us with the same inquiry in the future*

Examples:

  - *"You can view and itemized bill by clicking on the statement of account located on your My Buckeye Link."*
  - *"You can view your application status online at appstatus.osu.edu."*
2. Subsequent contacts
  - *Issue is resolved in the first contact, no additional contacts from caller regarding the same issue barring occurrences outside of counselor control*
3. Anticipates future questions
  - *Counselor identified and discussed all relevant topics related to initial contact and gave information to prevent issues in the future*

### **First Contact Resolution Scoring Rubric**

**0** Counselor answered initial questions in part or not at all. Counselor did not review account holistically (holds, to-do list items, etc.), educate the caller, or assist them in becoming self-sufficient. Counselor did not set expectations for caller on what processing timeline to expect. Counselor did not anticipate future questions and did not follow up when required/advised. Counselor's lack of research into account may have caused subsequent contacts about the initial issue.

**1** Counselor researched the account sufficiently enough to answer the initial question posed by caller. Counselor did not educate the caller nor did they anticipate future questions or set any expectations regarding processing timelines etc. Counselor followed up when appropriate but not necessarily in a timely manner.

**2** Counselor thoroughly researched account, successfully identifying potential issues. Counselor partially educated caller on relevant next steps, holds, and to-do list items, and/or counselor set partial expectations for caller on what processing timeline to expect. When appropriate counselor followed up in a timely manner.

**3** Counselor thoroughly researched account, successfully identifying potential issues. Counselor discussed issues unknown to caller and/or identified an issue and resolved it thus preventing the need for subsequent contacts. Counselor educated caller on relevant next steps, holds, and to-do list items. Counselor set expectations for caller on what processing timeline to expect, and when appropriate counselor followed up in a timely manner.

**4** Counselor thoroughly researched account, successfully identifying potential issues. Counselor discussed issues unknown to caller and/or identified an issue and resolved it thus preventing the need for subsequent contacts. Counselor educated caller on relevant next steps, holds and to-do list items, potential future actions, and to be self-sufficient. Counselor referred to stakeholder offices appropriately throughout the interaction. Counselor set expectations for caller on what processing timeline to expect. When appropriate counselor followed up in a timely manner and/or directed the issue to the relevant contact, and/or offered to be the point of contact for the specific issue.

### Control

Scorecard Focus 3

### Comments

#### 1. Timely

- *Comment should be made immediately after the call*

#### 2. Accurate

- *Comment must match actual conversation*

#### 3. Format

- *Summarizes caller's questions and explanation provided*
- *Documents case appropriately*
  - *Creates new case or adds to prior case as necessary*
  - *Chooses appropriate wrap-up categories*
  - *Adds Additional Contacts Referenced if necessary*
  - *Uses professional language and observes various privacy regulations*

### Efficiency

#### 1. Uses holds effectively

- *Keeps the caller engaged allowing for little to no periods of silence*
- *Places caller on hold while researching account—preferably only one hold but no more than 2 times at the most*
- *Asks for permission and explains why placing on hold*
- *Checks in every two minutes; has caller on hold no longer than 4 minutes*

- *Thanks caller (by name/title) for holding upon return*
2. Call length
    - *Length of call should be appropriate based on subject matter and complexity of the inquiry*
  3. ACW
    - *Time spent after disconnecting a call should be appropriately brief; no more than 3 minutes for the majority*
    - *Once comment is complete counselor must immediately return to available in phone queues*
    - *ACW includes time spent for comments, adding to REVI etc.*

### Control Scoring Rubric

**0** Comment was inaccurately documented, lacking relevant details, unprofessional language was used, and/or comment was not posted in a timely manner resulting in an obstruction of information to colleagues or work being duplicated unnecessarily. Holds were excessive and After Call Work time surpassed expectations.

**1** Comment was inaccurately documented, lacking relevant details, unprofessional language may have been used, and/or comment was not posted in a timely manner. Holds were excessive and After Call Work time surpassed expectations.

**2** Call was documented but was either missing relevant information or was not posted in a timely manner. Comment is professional and adheres to all relevant privacy regulations. Additionally, Holds and/or After Call Work time expectations may or may not have been exceeded.

**3** Counselor documents the call immediately and accurately, and formatting reflects suitable wrap up categories. Comment is professional and adheres to all relevant privacy regulations. Holds and/or After Call Work times exceeded efficiency expectations.

**4** Counselor documents the call immediately and accurately, and formatting reflects suitable wrap up categories. Comment is professional and adheres to all relevant privacy regulations. Uses holds efficiently and call is of an appropriate length for subject matter. After Call Work time it utilized effectively and is of appropriate length.

### Rewards

- Monthly average of 3.3 for calls and emails earns one STAR each