

Result ID 10244: Score for Kristine Pierce

Employee	Kristine Pierce	Event Date	24/04/2024
Group	Five Lakes Law Group	Event Time	11:30:00
Team	FLLG Attorneys	Event Duration	00:09:56
Monitor	Che Briner	Event Type	Positive Consult
Supervisor	Donald Green	Sub Type	
Card Type	Multi-channel	Reference	<a href="https://app.iz1.sharpen.cx/contactCard/17172610">https://app.iz1.sharpen.cx/contactCard/17172610</a>
Client Name	Stephan Simmons	Program Number	BRP-612590

Scorecard: FLLG Initial Consultation 2.0 (Multi-channel)

Question		Causes and Comments	Answers	Score
Call Recording Disclaimer				
1	Did the attorney provide the call recording disclaimer? The attorney may say, "This is attorney John Doe calling on a recorded line" or "This call may be recorded for Quality Assurance purposes."	<b>Comment</b>  The attorney didn't provide the call recording disclaimer.	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	0
Attorney Introduction				
2	Did the attorney identify the company they are calling from as Five Lakes Law Group?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
3	Did the attorney explain the services they are responsible for providing during the client's enrollment in the program, including monitoring the client's progress, overseeing support staff, and approving settlements, and that they wouldn't be the only attorney working to protect the client's interests?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
4	Did the attorney appropriately identify the team of business professionals (customer service and settlement agents) they work with, and create reasonable expectations by explaining that the attorney will not be the client's primary point of contact, because these team members handle the day-to-day work on the client's file?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
5	Did the attorney confirm the client had received the company's contact information, including access to the company app? If the client did not have the information, did the attorney provide it to the client or tell the client the attorney would have it sent to them?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
Clients Program Overview				
6	Did the attorney review the client's program details, including total enrolled debt?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1

Question		Causes and Comments	Answers	Score
7	Did the attorney review the client's program details, including the number of accounts?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
8	Did the attorney review the client's program details, including frequency of payments?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
9	Did the attorney review the client's program details, including dollar amount of payments?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
10	Did the attorney review the client's program details, including term length?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
Ensure Client Understands the Program				
11	Did the attorney confirm that the client understands they are enrolled in a debt settlement program, which involves negotiating settlements on enrolled debts?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
12	Did the attorney explain our program requires the client to make payments into their dedicated escrow/savings account?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
13	Did the attorney explain enrolled debts are settled as deposits accumulate in their account and negotiations are completed?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
Lawsuit Considerations				
14	Did the attorney ensure the client understands that there is a possibility of a lawsuit, but most enrolled accounts are settled prior to any legal action? Only 1-2% of accounts enrolled in our program receive a lawsuit.		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
15	Did the attorney appropriately manage the client's expectations regarding the Pro Se Answer process, including letting the client know we will draft an Answer to the Complaint which the client can file with the court.		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
16	Did the attorney appropriately manage the client's expectations regarding the Pro Se Answer process, including letting the client know that we do not formally represent them/will not appear in court?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1

Question	Causes and Comments	Answers	Score
Positive Aspects of Lawsuits			
17	Did the attorney explain that, in most cases, it is in the creditors and their attorneys' best interest to settle the account as opposed to pursuing expensive litigation?	<div>Comment</div> <div>To improve, the attorney needs to explain that in most cases, it is in the creditors and their attorneys' best interest to settle the account as opposed to pursuing expensive litigation.</div> <div><input type="radio"/> Yes</div> <div><input checked="" type="radio"/> No</div> <div><input type="radio"/> N/A</div>	0
18	Did the attorney assure the client that we have a good track record of getting accounts settled?	<div>Comment</div> <div>To improve, ensure the client understands that we have a good track record of getting accounts settled.</div> <div><input type="radio"/> Yes</div> <div><input checked="" type="radio"/> No</div> <div><input type="radio"/> N/A</div>	0
Benefits of Debt Settlement			
19	Did the attorney inform the client that most enrolled debts are settled for less than the original amount owed?	<div><input type="radio"/> Yes</div> <div><input checked="" type="radio"/> No</div> <div><input type="radio"/> N/A</div>	0
20	Did the attorney ensure the client understands that we will reach out to the creditors on their behalf?	<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1
21	Did the attorney let the client know they have no legal obligation to communicate with their creditors and may even cease communication with their creditors while enrolled in the program?	<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1
22	Did the attorney ensure the client received the creditor phone line, which is (281) 907-9025?	<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1
Call Handling Details			
23	Was the call initiated in a timely manner?	<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div>	1
24	Was the call concluded in a timely manner?	<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div>	1
25	Did the attorney select and save the correct disposition option during the wrap-up phase?	<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div>	1

Question		Causes and Comments	Answers	Score
26	Were any topics outside of the consult discussed? If so, what was discussed?	<p><b>Cause</b> the client was informed of Right of Offset</p> <p><b>Comment</b>  The attorney provided instructions on how to avoid a Right of Offset.</p>	<input checked="" type="radio"/> Yes  <input type="radio"/> No	0
Soft Skills				
27	Did the attorney maintain a pace conducive to a positive interaction?	<p><b>Comment</b>  Although the attorney used some filler words, such as uh and um, it wasn't so excessive that it caused a hinderance to the pace of the consult. Overall, the pace was well-balanced.</p>	<input type="radio"/> Excellent Work <input checked="" type="radio"/> <b>Within Target Range</b> <input type="radio"/> Minor Adjustments Needed <input type="radio"/> Some Improvement Needed <input type="radio"/> Large Improvement Needed	0.85
28	Did the attorney maintain a tone conducive to a positive interaction?	<p><b>Comment</b>  The attorney maintained a friendly tone throughout the consult that changed in inflection and delivery, when needed, to ensure client understanding and engagement.</p>	<input checked="" type="radio"/> <b>Excellent Work</b> <input type="radio"/> Within Target Range <input type="radio"/> Minor Adjustments Needed <input type="radio"/> Some Improvement Needed <input type="radio"/> Large Improvement Needed	1
29	Did the attorney convey confidence while discussing the debt settlement process?	<p><b>Comment</b>  The attorney mostly showed a confidence in their knowledge. They used some filler words (like uh/um), but it wasn't excessive. The attorney also made a few statements that showed a lack of confidence in the program. One such statement was, 'we generally pay off settlements over time from your escrow'.</p>	<input type="radio"/> Excellent Work <input type="radio"/> Within Target Range <input checked="" type="radio"/> <b>Minor Adjustments Needed</b> <input type="radio"/> Some Improvement Needed <input type="radio"/> Large Improvement Needed	0.7

Question		Causes and Comments	Answers	Score
30	Did the attorney make a personal introduction that demonstrates the attorney's background?	<p><b>Comment</b></p> <p>To improve, the attorney should make a personal introduction that shows their experience as an attorney and how that ties into helping the client.</p>	<p><input type="radio"/> Excellent Work</p> <p><input type="radio"/> Within Target Range</p> <p><input type="radio"/> Minor Adjustments Needed</p> <p><input type="radio"/> Some Improvement Needed</p> <p><input checked="" type="radio"/> <b>Large Improvement Needed</b></p>	0
31	Did the attorney build rapport with the client by actively listening, leading with empathy and respect, and demonstrating patience?	<p><b>Comment</b></p> <p>The attorney demonstrated patience throughout the consult but could have built more of a rapport by engaging more with the client's statements.</p>	<p><input type="radio"/> Excellent Work</p> <p><input checked="" type="radio"/> <b>Within Target Range</b></p> <p><input type="radio"/> Minor Adjustments Needed</p> <p><input type="radio"/> Some Improvement Needed</p> <p><input type="radio"/> Large Improvement Needed</p>	0.85
32	Did the attorney demonstrate ownership and responsibility for the client's success in the program?	<p><b>Comment</b></p> <p>The attorney displayed ownership at times. However, there were a few times where the attorney passed ownership off on other departments. This occurred mostly in the explanation of how lawsuits would be handled. To improve, the attorney should use more "I" statements instead of "my team". Also, in the initial introduction, the attorney stated, 'the lawyers are mainly responsible' and 'we will approve those'. This was an opportunity to use 'I' statements to show ownership.</p>	<p><input type="radio"/> Excellent Work</p> <p><input type="radio"/> Within Target Range</p> <p><input checked="" type="radio"/> <b>Minor Adjustments Needed</b></p> <p><input type="radio"/> Some Improvement Needed</p> <p><input type="radio"/> Large Improvement Needed</p>	0.7

Question		Causes and Comments	Answers	Score
33	Did the attorney use positive language and praise when discussing the support staff to help foster the client's confidence and trust in the team?	<b>Comment</b>  The attorney did not provide words of praise for the support staff. To improve, use at least 1 word of praise to be Within Target, and use at least 2 words of praise for Excellent Work. Words of praise such as "they are thorough" and "they are exceptional".	<input type="radio"/> Excellent Work <input type="radio"/> Within Target Range <input type="radio"/> Minor Adjustments Needed <input type="radio"/> Some Improvement Needed <input checked="" type="radio"/> Large Improvement Needed	0
34	Did the attorney encourage the client to ask questions and were those questions effectively answered?	<b>Comment</b>  The attorney paused several times throughout the consult to provide the client with the chance to ask questions.	<input checked="" type="radio"/> Excellent Work <input type="radio"/> Within Target Range <input type="radio"/> Minor Adjustments Needed <input type="radio"/> Some Improvement Needed <input type="radio"/> Large Improvement Needed	1

#### Concerns and Cancellation Details

35	Did the client express to the attorney that they were hesitant?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
36	If the client expressed hesitancy, did the attorney successfully overcome the client's concerns to ensure a positive consultation?		<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A	1
37	Did the client express they cancelled prior to the consult?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
38	Did the client express a wish to cancel during the consult?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
39	If cancellation was brought up, did the attorney attempt to transfer the client to the retention team?		<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A	1

↓ Below Target

Numeric:  
28.1

Percentage:  
80.29%

Minor Adjustments Needed

Section Totals

Section(s)	Total	Percentage	Non Numeric
Call Recording Disclaimer	0	0%	
Attorney Introduction	4	100%	Excellent Work
Clients Program Overview	5	100%	Excellent Work
Ensure Client Understands the Program	3	100%	Excellent Work
Lawsuit Considerations	3	100%	Excellent Work
Positive Aspects of Lawsuits	0	0%	
Benefits of Debt Settlement	3	75%	Minor Adjustments Needed
Call Handling Details	3	100%	Excellent Work
Soft Skills	5.1	63.75%	Some Improvement Needed
Concerns and Cancellation Details	2	100%	Excellent Work