

Result ID 5689: Score for Nichelle Sims

Employee	Nichelle Sims	Event Date	14/02/2024
Group	Five Lakes Law Group	Event Time	09:51:00
Team	FLLG Attorneys	Event Duration	00:10:50
Monitor	Kristen Brooks	Event Type	Positive Consult
Supervisor	Donald Green	Sub Type	
Card Type	Multi-channel	Reference	
Client Name	Patrick Nielsen	Program Number	BRP-548615

Scorecard: FLLG Initial Consultation (Multi-channel)

Question	Causes and Comments	Answers	Score
Call Recording Disclaimer			
1 Did the attorney provide the call recording disclaimer?		<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1
Attorney Introduction			
2 Did the attorney identify themselves?		<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1
3 Did the attorney identify the company?		<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1
4 Did the attorney ensure the client has an understanding of their role?		<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1
5 Did the attorney inform the client that other attorneys will also be working on their file?		<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1
6 Did the attorney discuss work will be conducted by support staff under supervision of an attorney?		<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1
7 Did the attorney create reasonable client expectations by explaining that they will not be client's primary point of contact?		<div><input checked="" type="radio"/> Yes</div> <div><input type="radio"/> No</div> <div><input type="radio"/> N/A</div>	1

Question		Causes and Comments	Answers	Score
8	Did the attorney provide the contact information to the law firm, confirm the client already has it, or confirm the client know where to find it (phone, text, and email)?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
Clients Program Overview				
9	Did the attorney verify with the client that a representative went over the client enrollment agreement with them?		<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	0
10	Did the attorney provide a brief summary of the client's number of enrolled accounts?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
11	Did the attorney provide a brief summary of the client's total enrolled debt?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
12	Did the attorney provide a brief summary of the client's deposit frequency?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
13	Did the attorney provide a brief summary of the client's deposit amount?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
14	Did the attorney provide a brief summary of the client's anticipated term length?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
Ensure Client Understands the Program				
15	Did the attorney let the client know that the program involves negotiations on enrolled debts?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
16	Did the attorney let the client know that the program requires the client to make payments into their escrow/savings account?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
17	Did the attorney inform the client that accounts are settled as deposits accumulate and negotiations with creditors are completed?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1

Question		Causes and Comments	Answers	Score
Lawsuit Considerations				
18	Did the attorney inform the client that there is a possibility of a lawsuit?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
19	Did the attorney inform the client that most accounts are settled prior to any legal action?		<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	0
20	Did the attorney let 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
21	Did the attorney let the client know that we do not formally represent them and will not appear in court?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
22	Did the attorney let the client know we will work to resolve the lawsuit as a top priority?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
23	Did the attorney let the client know in the unlikely situation a settlement can't be reached, a judgment may issue; however, judgments may still be settled for less than the amount owed?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
Positive Aspects of Lawsuits				
24	Did the attorney let the client know the creditor will be represented by an attorney, which typically makes communication and settlement negotiations considerably more efficient?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
25	Did the attorney let the client know the attorney representing the creditor is often able to offer more favorable settlement terms once suit has been filed?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
26	Did the attorney inform the client that the creditor's attorney will usually agree to delay the case where needed in order to give the client additional time to save funds for settlement? This is because the attorney representing the creditor is usually motivated to settle the debt and recognizes that the creditor will not benefit from an unpaid judgement or from pushing the client into bankruptcy.		<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	0
Benefits of Debt Settlement				

Question		Causes and Comments	Answers	Score
27	Did the attorney let the client know most debts are settled for less?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
28	Did the attorney let the client know this enables the client to get out of debt for less, as compared to debt consolidation or making payments as usual?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
29	Did the attorney let the client know where a full balance settlement becomes necessary, typically an extended payment term can be negotiated, and additional interest can be reduced or eliminated?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
30	Did the attorney let the client know our office contacts the creditors on client's behalf to negotiate settlements?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
31	Did the attorney let the client know that they can choose to cease communications with their creditors while enrolled in the program?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
32	Did the attorney let the client know creditors can be referred to FLLG's creditor phone line, which is (281) 907-9025?		<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
Call Handling Details				
33	Was the call initiated in a timely manner?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
34	Was the call concluded in a timely manner?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
35	Was the attorney's tone conducive to a positive consultation?		<input checked="" type="radio"/> Yes <input type="radio"/> No	1
36	Was the attorney's pace conducive to a positive consultation?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
37	Did the attorney offer time for the client to ask questions and were those questions effectively answered?		<input checked="" type="radio"/> Yes <input type="radio"/> No	1
38	Did the attorney select and save the correct disposition option during the wrap-up phase?		<input checked="" type="radio"/> Yes <input type="radio"/> No	1

Question		Causes and Comments	Answers	Score
39	Were any topics outside of the consult discussed? If so, what was discussed?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
Concerns and Cancellation Details				
40	Did the client express to the attorney that they were hesitant?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
41	If the client expressed hesitancy, did the attorney overcome the client's concerns?		<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A	1
42	Did the client express they cancelled prior to the consult?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
43	Did the client express a wish to cancel during the consult?		<input type="radio"/> Yes <input checked="" type="radio"/> No	0
44	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:
34

Percentage:
85%

Section Totals

Section(s)	Total	Percentage
Call Recording Disclaimer	1	100%
Attorney Introduction	7	100%
Clients Program Overview	5	83.33%
Ensure Client Understands the Program	3	100%
Lawsuit Considerations	5	83.33%
Positive Aspects of Lawsuits	2	66.67%
Benefits of Debt Settlement	6	100%
Call Handling Details	3	50%
Concerns and Cancellation Details	2	100%