

Result ID 10302: Score for Wesley Tetsworth

Employee	Wesley Tetsworth	Event Date	22/04/2024
Group	Five Lakes Law Group	Event Time	15:01:00
Team	FLLG Attorneys	Event Duration	00:07:05
Monitor	Dreylin Perry	Event Type	Positive Consult
Supervisor	Donald Green	Sub Type	
Card Type	Multi-channel	Reference	<a href="https://app.iz1.sharpen.cx/contactCard/17109754">https://app.iz1.sharpen.cx/contactCard/17109754</a>
Client Name	Alexis Walton	Program Number	BRP-609890

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."	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
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 type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	0

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?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
18	Did the attorney assure the client that we have a good track record of getting accounts settled?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	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?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	0
20	Did the attorney ensure the client understands that we will reach out to the creditors on their behalf?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	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?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	1
22	Did the attorney ensure the client received the 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			
23	Was the call initiated in a timely manner?	<input type="radio"/> Yes <input checked="" type="radio"/> No	0
24	Was the call concluded in a timely manner?	<input type="radio"/> Yes <input checked="" type="radio"/> No	0
25	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
26	Were any topics outside of the consult discussed? If so, what was discussed?	<input type="radio"/> Yes <input checked="" type="radio"/> No	0
Soft Skills			

Question		Causes and Comments	Answers	Score
27	Did the attorney maintain a pace conducive to a positive interaction?	<p><b>Comment</b></p> <p>Although the attorney did a good job at maintaining a good pace, there was a quite a bit of use of filler words, which breaks up the pace and makes the information harder to understand.</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
28	Did the attorney maintain a tone conducive to a positive interaction?	<p><b>Comment</b></p> <p>The attorney maintained a pleasant tone but, at times, came across as scripted. He also sighed a lot, which comes across as disinterested and unwilling to be on the call.</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 checked="" type="radio"/> <b>Some Improvement Needed</b></p> <p><input type="radio"/> Large Improvement Needed</p>	0.5
29	Did the attorney convey confidence while discussing the debt settlement process?	<p><b>Comment</b></p> <p>The attorney mostly showed confidence for the program and their knowledge through their statements. However, at times, the attorney used filler words (uh/um), which can show a lack of confidence in their knowledge.</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
30	Did the attorney make a personal introduction that demonstrates the attorney's background?	<p><b>Comment</b></p> <p>The attorney didn't provide any type of personal introduction. This could include how long they have studied law, where they went to school, how long they have practiced law, etc.</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

Question		Causes and Comments	Answers	Score
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 displayed active listening throughout the consult.</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>When discussing their role, and how they would help the client, the attorney came across as scripted and disinterested.</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
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?	<p><b>Comment</b></p> <p>Although the support staff and their role was brought up, the attorney never offered any words of praise for them.</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

Question		Causes and Comments	Answers	Score
34	Did the attorney encourage the client to ask questions and were those questions effectively answered?	<b>Comment</b> The attorney did a good job at asking if the client had any questions, and responding to those questions.	<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

Concerns and Cancellation Details

35	Did the client express to the attorney that they were hesitant?		<input type="radio"/> Yes <input checked="" type="radio"/> <b>No</b>	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"/> <b>N/A</b>	1
37	Did the client express they cancelled prior to the consult?		<input type="radio"/> Yes <input checked="" type="radio"/> <b>No</b>	0
38	Did the client express a wish to cancel during the consult?		<input type="radio"/> Yes <input checked="" type="radio"/> <b>No</b>	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"/> <b>N/A</b>	1


Below Target

Numeric:  
26.3

Percentage:  
75.14%

Minor Adjustments Needed

Section Totals

Section(s)	Total	Percentage	Non Numeric
Call Recording Disclaimer	1	100%	Excellent Work
Attorney Introduction	4	100%	Excellent Work
Clients Program Overview	5	100%	Excellent Work
Ensure Client Understands the Program	3	100%	Excellent Work
Lawsuit Considerations	2	66.67%	Some Improvement Needed
Positive Aspects of Lawsuits	1	50%	Large Improvement Needed
Benefits of Debt Settlement	3	75%	Minor Adjustments Needed
Call Handling Details	1	33.33%	Large Improvement Needed
Soft Skills	4.3	53.75%	Some Improvement Needed
Concerns and Cancellation Details	2	100%	Excellent Work