**LDS Philanthropies Telefund**

**Interview Mock Call Leadership Sheet**

**Purpose**

The purpose of a mock call is to access an applicant’s potential as a caller. While scores in each category are important to compare applicants and make hiring decisions, the most important aspect of a mock call is to measure how well an applicant can apply feedback. This rubric will help identify which areas applicants can focus on and improve by giving specific scoring instructions to leadership members taking mock calls.

**Focus of Each Rubric Category**

1. **Ask Structure –** measures the way a caller structures their ask(s). Did the caller ask three times? Did the caller specify an amount and designation? Did they confirm the amount and designation if the prospect gave?
2. **Ask Effectiveness –** relates to the wording of the ask as well as the transition into the ask. Strong asks are concise and direct. The caller should give a reason for the prospect to give (i.e. support a specific program or body of students)
3. **Introduction –** measures how well the caller introduces his or herself, states the purpose of the call, and transitions into rapport.
4. **Rapport –** measures the strength of the caller’s rapport. Does it connect the prospect back to BYU? Does the caller ask open ended questions that encourage the prospect to share about themselves? Does the rapport lead into an ask?
5. **Empathy & Sincerity –** measures how interested the caller was in the prospect. Did the caller demonstrate understanding when the prospect refused? Did the prospect feel validated in their concerns? Did the caller pay attention to the refusal reason and use it forming later asks?
6. **Tone –** measures how enthusiastic the caller was on the phone. Did the caller demonstrate passion about the fundraising priorities? Was the caller upbeat and positive in speaking with the prospect? Was the caller at all condescending or abrasive?
7. **Professionalism –** measures the etiquette of the caller. Did the caller avoid filler or unprofessional words? (um, awesome, cool, etc.) Did the caller speak at a moderate pace so the prospect could easily understand them? Was the caller confident in all aspects of the call? If something unexpected happened, did the caller remain collected?
8. **Objection Handling –** measures how well the caller worked with prospect and not against them. Did the caller modify their approach when the prospect had objections? Was the caller calm and confident in handling the prospect’s objection(s)?
9. **Purpose –** measures if the caller accomplished the purpose of the call. Did the caller connect the prospect back to BYU? Did the caller give the prospect an opportunity to give back to the school? Did the caller review the prospect’s demographic information? Did the prospect have a positive experience?
10. **Feedback Application –** measures how well the caller took and applied feedback. This score should be determined by **both** leadership members taking the mock call.

**Procedure**

1. **Setup –** Two leadership members take a mock call: One to take the first call and a second for the second call. Take a copy of this sheet and both Mock Call sheets. Review the descriptions above and the rubric on the reverse side.
2. **First Call –** The first leadership member reviews the scenario on the first Mock Call sheet and writes their name at the bottom
   1. During the call, use the comment boxes to take notes on the progress of the call.
   2. After the applicant finishes, give three specific pieces of feedback. Each piece of feedback must be focused on improving a specific category on the rubric.
   3. Hang up and give the phone to the next leadership member then finalize your score (except for feedback application) based off the rubric on the back and write down feedback in the space provided
3. **Second Call –** The second leadership members reviews the scenario on the second Mock Call sheet and writes their name
   1. During the call, use the comment boxes to take notes on the progress of the call.
   2. After the applicant finishes, hang up and finalize your score with the exception of the feedback
4. **Feedback Discussion –** After scoring all other categories individually, the two leadership members meet to discuss how the applicant applied feedback. Together they decide the feedback score for both calls and provide reasoning in the space provided.
5. **Final Score –** The final score given to an applicant is the median score between the first and second call. If either leadership member disagrees with this score, they may make their case to the managers when scores are recorded.



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| **Quality** | **Effectiveness Rubric** | | | | |
| **1 - Completely Ineffective** | **2 - Ineffective** | **3 - Somewhat Effective** | **4 - Effective** | **5 - Very Effective** |
| **Asks: Structure** | Did not specify amount and/or designation at any point during the call. Or only asked once | Had 2 asks that may not have had specific amounts attached to each | Had all 3 asks but they did not have specific amounts attached to each ask. | All 3 Asks, Specific Amounts (follows guidelines) | Additionally, specified the designation before and in the ask. Confirmed the pledge amount and designation after receiving. |
| **Asks: Effectiveness** | Ask(s) were awkward or impossible to understand. The caller had very little confidence in asking | Ask(s) were poorly worded and showed that caller did not adequately think through their asks | Ask(s) were worded well but were indirect or abruptly given | Most of the asks were well worded and direct. Made a good case for giving (to support students, etc.) | All asks were effectively worded, smooth and concise. Made a strong appeal to giving back |
| **Introduction** | Introduction left the prospect confused as to who was calling or why they were calling | Introduction was incomplete: either they didn't introduce themselves or did not state the purpose of the call. | Stated the purpose the call completely, possibly shaky wording. Transitions were used occasionally | Gave a clear introduction that stated the purpose of the call. Transitions were somewhat thought out and created flow | Gave a concise and effective introduction. Stated the purpose of the call clearly. The call flowed logically |
| **Rapport** | No attempt made to connect the prospect to BYU | Rapport was limited or awkward. Transition to asks was abrupt | Made an effort but struggled to help the prospect feel connected to BYU. Transition to asks was rough | Connected to BYU, asked some open ended questions, comfortable and personable. Transitioned to asks | Questions were effective at making the prospect talk about BYU. Their rapport flowed naturally into asking |
| **Empathy & Sincerity** | Demonstrated little concern or respect for the prospect and their circumstances. Offended the prospect | Demonstrated some empathy or sincerity but did not seem genuine | Seemed genuine in their empathy but were awkward in expressing it. Over expressed empathy and annoyed the prospect | Genuinely interested in the prospect and when given a refusal reason, they were understanding | Additionally the caller remembered the refusal reason throughout the call to validate the prospect's concerns |
| **Tone** | Their tone indicated apathy toward fundraising or was unpleasant for the prospect | Friendly to the prospect but seemed unenthusiastic about BYU or fundraising | Demonstrated some enthusiasm for BYU and was positive on the phone | Friendly and enthusiastic about fundraising for BYU. Happy and comfortable phone presence | Genuinely enthused to call on behalf of BYU. Excellent tone and infectious enthusiasm |
| **Professionalism** | The prospect had great difficulty understanding the prospect or the caller was informal with the prospect | Frequently used unprofessional vocab, or had an irregular speaking speed that made it difficult to understand the caller | Was a professional and confident for most of the call but had occasional slips or became nervous during the call | Moderate speaking speed, avoided filler words, confident on the phone. Did not use words such as "awesome" or "cool". | Along with have good tone, they maintained an air professionalism that was comforting to the prospect |
| **Objection Handling** | The caller was insensitive, worked against the prospect, and ultimately made the situation worse | The caller tried to work with the prospect but seemed insincere in handling objections | Sincerely worked with the prospect but was not very convincing in changing the prospect's mind. | Modified their approach according to objections. Worked with the prospect not against them. Prospect may have given | Additionally, their response to objection eased the prospects concerns masterfully and motivated the prospect to give |
| **Purpose** | Failed to accomplish any of the purposes of the call effectively or the call was a negative experience for the prospect | Attempted to accomplish the purposes of the call but did not make a good case for giving to BYU | Attempted to accomplish the purposes of the call but did not update records | Verified information and made an honest attempt at connecting the prospect to BYU and asking for support | Accomplished all purposes of the call effectively and provided a positive experience for the prospect |
| **Feedback Application** | Failed to apply any of the feedback given well | Applied one piece of feedback well | Applied two pieces of feedback well | Took feedback well and asked clarifying questions. / Applied all points of feedback in their second call. | Applied all feedback well while maintaining the same strengths noted in the first call |