

Nursing Admissions Quality Contact Call Rubric
Final form name: ADM - Nursing Sales - form

Last Updated: 12/04/2008 (by: CCS Quality Division)

Contact Calls				
Attribute	Yes	Yes / Coach	No	N/A
Advisor provides "call will be recorded" disclosure	Advisor provides the "this call may be monitored or recorded for training purposes" disclosure and within the first 30 seconds of the call, which begins once the intended party is on the phone.	N/A	Advisor mentions the "call recording disclosure" after the first 30 seconds, or does not mention the disclosure at all.	The recording does not contain this portion of the call, or the call was a direct inbound call that came through the automated system.
Proper Opening/ Introduction	Advisor identifies self (using first and/or last name), Nursing Admissions and Kaplan during the introduction, as well as ensures they are speaking with the right person.	Advisor does parts of the introduction (Self/Nursing Admissions/Kaplan) and ensures they are speaking to the right person.	Advisor does not provide any introduction, and/or he or she does not ensure they are speaking to the right person.	The recording does not contain this portion of the call.
Empower student to respond/ Advisor call control	Advisor encourages the prospect to talk about him/herself, yet maintains control of the call.	Advisor encourages the prospect to talk about him/herself. Advisor made an attempt to maintain control of the call.	Advisor does not provide opportunities for the prospect to express themselves. Advisor did not maintain call control.	This interaction type does not warrant this kind of behavior.
Asks probing Questions to Gauge Students Interest	Probing questions were used to get further detail from prospect on their challenges, motivations and level of interest. Using open-ended or closed-ended questions where appropriate.	Probing questions were asked - but the proper information was not solicited to help acknowledge and address challenges, motivations and or level of interest	Minimal to no probing questions were used - but opportunities were present	No probing questions were required during this interaction.
Build Rapport w/ Prospect	Advisor makes an attempt to build/maintain a connection with the prospect by using small talk and appropriate use of verbal expressions.	N/A	Advisor did not make an attempt to build/maintain a connection with the prospect. Did not make use of small talk.	N/A

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Attribute	Contact Calls Continued		N/A	N/A
	Yes	Yes / Coach		
Advisor Overcomes Objections	Advisor makes 2 attempts to overcome the objection by using a response which was directly related to the objection. Advisor used a response which was directly related to the objection. Advisor did not initiate any objections. *For Exceptions to Overcoming Objections Please Refer to the ADA Guidelines	Advisor made 1 attempt to overcome the objection by using a response which was related to the objection. Advisor used a different response, but the relationship to the objection could still be derived.	Advisor made no attempt to overcome the objection. Advisor used a response that was totally unrelated to the objection, or did not respond to the objection at all.	N/A
Active Listening	Advisor listens attentively to prospect's responses and questions. Does not require the prospect to repeat responses or jump to conclusions.	Advisor listens politely to the prospect. Advisor does not recall information where relevant later in the call and needs to ask questions for which answers were already given.	Advisor does not listen to the prospect rather they ignore the responses and/or interrupts the prospect	N/A
Schedule Specific Callback w/ Agenda	Advisor sets a specific follow up date and time, when appropriate, with the prospect. Details the steps to getting the prospect enrolled and attending Kaplan.	Advisor sets a specific follow up date and/or time with the prospect when appropriate, but does not provide an agenda.	Advisor does not set a specific follow up time and date.	N/A
Advisor was Professional in His or Her Demeanor	Advisor exhibits a courteous and generally businesslike manner during the interaction. Advisors approach demonstrates a willingness to assist the prospect.	Advisor exhibits some professional components but others require work. Advisors approach demonstrates a willingness to assist the prospect. (Please be sure to cite those components requiring work).	Advisor lacks professionalism in his or her demeanor.	N/A
Use of Proper Closing Statement	Advisor asks prospect if they have any further questions. Advisor ensures the prospect has their contact number and thanks them for calling Kaplan. (Toll free number not required on inbound calls)	Advisor uses most of the appropriate closing statement for the interaction.	Advisor does not use appropriate closing statement.	Proper Closing Statement was not required for this interaction.

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Areas of Integrity

Attribute	Yes	Yes / Coach	No	N/A
Advisor Keeps Dialogue within their Boundaries	Advisor does not overstep his/her authority by discussing specifics outside their department or boundaries. Advisor provides direction and guidance on where to go for further information. (Example: Financial Aid-Do's and Don'ts, FAFSA, Loan Quiz, Request/Imply to take conversation offline, Academic Advising, etc...)	Advisor does not overstep their authorized bounds, but does not provide direction and guidance on where to go for further information.	Advisor initiates dialogue to respond to questions outside their domain.	Dialogue initiation to respond to questions was not required during this interaction.
Accurate Information Provided	Advisor provided accurate information to the prospect/student.	Advisor may have made an error in information, but went back, explained error and provided accurate information.	Advisor provided inaccurate information to the prospect/student.	No information was provided during this interaction.
Discussion of Multiple Lenders	Advisor followed protocol by not discussing Multiple Lenders or implying an opinion of any lender.	N/A	Advisor did speak to the prospect concerning lenders, or implied an opinion of a lender.	N/A