

Telephone Calling Metrics Scorecard Instructions

Telephone Calling Metrics Instructions

- 1) **Fill out the top line on the Daily Calling Metric Scorecard.** If you need more than one Daily Calling Metric Scorecard use additional sheets as needed.
- 2) Everytime you dial a number, cross out a number in the **Number's Dialed** box.
- 3) Whenever you contact the person you are calling, or if they return your call, enter their name in the column under **Contact Name**.

To the right of the Contact Name, check the appropriate box for the **Category**:

NP - when the person is a **New Prospect**

CM - when the person is a current **Client or Member**

Check the appropriate box for the **Outcome**:

SA - Set Appointment - A New Prospect or Client/Member agreed to schedule a meeting.

LM - Left Message - You left a message requesting a call back from the person.

CB - Person Called Back - The person called you back as a result of your message.

SM - Sale Made - The person agreed to buy one of your products or services.

RO - Referral Obtained - You received a referral from the person you contacted.

- 4) At the end of the day, add up your **Dials, Categories, and Outcomes** entering the totals in the appropriate **Today's Total** box.
- 5) If you block out dedicated time for making outbound calls enter the number hours in the **Hours Dialing Today** box.
- 6) Bring forward any totals from the previous day and enter in the appropriate **Previous Total** box and add to the Today's Total box to calculate your **New Total**.
- 7) At the end of the week transfer the information to the **Month at a Glance Telephone Calling Scorecard**
 - **Daily OR Hourly** averages calculations for the week.
 - **Daily** - Divide your weekly totals by the number of days you called.
 - **Hourly** - Divide your weekly totals by the number of hours you called
 - **Activity Effectiveness Ratio** - This ration can be calculated at any time. We recommend you calculate it at the end of every month to chart your results.
- 8) At the end of the month, transter the information to the **Year at a Glance Telephone Calling Scorecard**

There are blank copies of the Scorecards on the following three pages. As a participant of the Bridgeway Learning Telephone Skills workshop, make copies as needed to keep Score of your progress.

Daily - Telephone Calling Metrics Scorecard

Date: _____

Name: _____

Position: _____

Daily Metric Page ____ of ____

Number's Dialed		
1	2	3
4	5	6
7	8	9
10	11	12
13	14	15
16	17	18
19	20	21
22	23	24
25	26	27
28	29	30
31	32	33
34	35	36
37	38	39
40	41	42
43	44	45
46	47	48
49	50	51
52	53	54
55	56	57
58	59	60
61	62	63
64	65	66
67	68	69
70	71	72
73	74	75
76	77	78
79	80	81
82	83	84
Today's Total:		
Previous Total:		
New Total:		

Category: NP = New Prospect, CM = Client or Member				Outcomes: SA = Set Appointment, LM = Left Message, CB = Person Called Back, SM = Sale Make, RO = Referral Obtained					Notes:	
Contact Name:	Category		Outcome							
	NP	CM	SA	LM	CB	SM	RO			
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										
25										
Today's Total:									Hours Dialing Today:	
Previous Total:									Previous Hours:	
New Total:									New Total Hours:	

Month at a Glance - Telephone Calling Metrics Scorecard

Name: _____

Position: _____

Month: _____

Weekly Results

Week Ending	/ /	/ /	/ /	/ /	/ /	Total	Goal
Days							
Hours							
Number's Dialed							
People Contacted							
New Propects							
Client/Members							
Set Appointments							
Left Message							
Person Called Back							
Sale Made							
Referral Obtained							

Daily or Hourly Weekly Average

Number's Dialed							
People Contacted							
New Propects							
Client/Members							
Set Appointments							
Left Message							
Person Called Back							
Sale Made							
Referral Obtained							

Activity Effectiveness Ratios

	Actual ÷	Dials =	%
People Contacted			
New Propects			
Client/Members			
Set Appointments			
Left Message			
Person Called Back			
Sale Made			
Referral Obtained			
	<u>Left Messages</u>		
Person Called Back			

Year at a Glance - Telephone Calling Metrics Scorecard

Name: _____

Position: _____

Year: _____

Monthly Results

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	Goal
Days														
Hours														
Number's Dialed														
People Contacted														
New Propects														
Client/Members														
Set Appointments														
Left Message														
Person Called Back														
Sale Made														
Referral Obtained														

Average per: Day or Hour

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	Goal
Number's Dialed														
People Contacted														
New Propects														
Client/Members														
Set Appointments														
Left Message														
Person Called Back														
Sale Made														
Referral Obtained														

Activity Effectiveness Ratios

	<u>Actual</u> ÷ <u>Dials</u> = %	<u>Actual</u> ÷ <u>Dials</u> = %	<u>Actual</u> ÷ <u>Messages</u> = %
People Contacted		Left Message	Person Called Back
New Propects		Person Called Back	Date Ratio's Calculated _____
Client/Members		Sale Made	
Set Appointments		Referral Obtained	