

## Award: Client Profile Sheet # CPS Evaluation

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<b>Client Profile Sheet</b> For Internal Use Only For Internal Use Only ON CA _____  Location: CPS  District:  Region:	<b>0%:Overall Score / Pointage total (0/100)</b>  0%: Message Service Provider Information (0/0) 0%: CLIENT PROFILE SHEET (0/0)
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Question	Score	Answer
Today's date		
Is this a new entry or is this profile simply an update/edit of a Client Profile Sheet that was already created?	0/100	

### Message Service Provider Information

Your Call Centre/Service Bureau's Name		
City:		
State/Province		

### CLIENT PROFILE SHEET

**SUBMIT A MINIMUM OF TWELVE CLIENT PROFILES. The information you provide is the major factor in the criteria the callers and judges use for scoring. Give Your agents every opportunity to succeed. Be sure to keep track of the clients submitted and use the "Client Information Change Form" for any client changes.**

Client Number: 4 or 5 letters followed by 6 digits. (Example: Cae050679 or Ana0e048760)		
Client Name (ex., Bob's Plumbing):		
Provide Sample Postal/Zip Code:		
Provide <u>two</u> key staff names ( i.e. doctors names in clinic): (AOE program only)		
D.I.D. Number Assigned to Client (including area code):		
Additional area codes and exchanges serviced in area: (AOE program only)		
Area codes and/or geographic area serviced by this client: (AOE program only)		
Please state the hours that your call centre answers for this client: Be specific Monday-Friday		
Saturday:		
Sunday:		
Message Delivery Protocol (check All that apply):		
Hold Calls		
Page Everything		
Page Emergencies		
Do you take messages for: (AOE program only)		
Type of business, i.e. Residential real estate / female pediatrician / industrial heating & cooling products or services, and services, etc:		
Will the call require a credit card? (AOD program only)		
Call Answer Time (Call time counts from first ring and includes any auto answer or pre-screened message time) (AOD program only)		
Answer Phrase - How should Agent answer:		
How should Agent answer after Auto Answer / Auto Greeting:		

Message Requirements:		
Basic Message: Name, phone #, regarding		
Specialized Info (please describe below):		
This client requires a 10 digit telephone number:		
This client requires a 7 digit telephone number:		
Specialized Info:		
Other Info:		
<b>This field is mandatory. The judges will score the CSR's close based on your criteria and/or script.</b>		
Please provide either the closing script you expect your CSR's to follow, OR, the criteria that must be met by the closing they give. (i.e. thank caller, tell them what will be done with info, expected delivery date, total price etc)		
Attach TWO <u>Detailed</u> Sample Messages		
For AOD Clients, please provide a COMPLETE TRANSCRIPT of both sides of the call for this client. The transcript should include all appropriate and pertinent information i.e.: area code, telephone number, order numbers, client codes etc ...		
<b>Note: DO NOT cut and paste sample messages. Ensure that all necessary information is listed.</b>		
Sample Message 1 (or for AOD a sample Transcript):		
Sample Message 2 (or for AOD a sample transcript):		
<b>If this form consists of changes/edits for an existing Client Profiles Sheet, then after clicking "Submit Response" please notify johnl@thecrg.com that changes have been made. Thank you.</b>		

All information contained herein is the property of the Canadian Call Management Association (CAM-X). All results are preliminary until data analysis is complete.