



Inform USA: CALL CALIBRATION

A -- Excellent Performance

The specialist provided excellent service in all aspects of the call

Community Resource Specialist welcomes the client in a clear voice with a good tone. Rapport continues when exploring the reason for the call. Questions are relevant. The communication is friendly, appropriate and empathetic. The assessment feels like a natural conversation. Clarification takes place to ensure the Specialist understands the client's needs. Helpful resources are retrieved and shared with the caller in the context of informed choice. If no resources exist, the Specialist explains the situation and engages in problem-solving. If demographic questions are asked, their purpose is explained to the caller and they will be placed at an appropriate moment. The call ends in a respectful and supportive manner that optimizes success and encourages future trust/calls.

B – Good Performance

The specialist was clear and consistent, and went above expectations

Exhibits most of the components listed above but may fail to rise to the level of an "A" call because a few of the key features are missing and/or not conducted properly. For example, there may be unneeded and unexplained early questions, the clarification step may be missed, the call may not end properly, etc. However, there is a clear sense that the caller received good help in a professional manner.

C – Satisfactory Performance

The specialist met requirements but did not exceed them

Similar to a "B" call but missing more components. At the end, there may be some uncertainty about whether the client experienced a solid process but did not get the best possible information; or else, the client received the right information but the Specialist does not quite engage the client in the way the I&R prefers.

D -- Unsatisfactory Performance

The specialist mismanaged the call and did not meet most of the requirements

This is a call missing nearly all of the components of good I&R. The tone comes across as disinterested and intrusive. Irrelevant questions are asked. The client is not heard. There is an absence of clarification. Referrals do not come quickly and are not the best ones to share, and there is a sense that the Specialist is glad to end the call. Essentially, there is a clear sense that the caller did not receive any meaningful help.