

THE BUSINESS
INFORMATION
TECHNOLOGY

CARD CARRYING
MEMBER

IT Golden Thread Program

OBJECTIVE

To learn, listen and relate to our Members and those who service them. This time is designed to teach you what our Business Partners' daily lives are like, what our Members need from us and to learn how our company makes good on its promise to the member every day.

OBSERVATION GUIDELINES

- ✓ Remain silent at all times while monitoring the live calls. Remember, you're there to listen and learn.
- ✓ Observe the overall call handling process - *what* is being said, *why* it is being said and *how* it is being said.
- ✓ Pay particular attention to the purpose of the call and the information the member is requesting.

I feel this was a valuable experience for me (please rate):



Strongly
Disagree



Disagree



Neutral



Agree



Strongly
Agree

Comments/Suggestions:

Share any recommendations to improve systems and/or processes:

Observation Date/Time: _____

Advisor's Signature: _____

Your Name: _____

Your Signature: _____