



The QHS Criteria for Individual Service Excellence

Continuous Professional Development Log Book

Draft Oct 2006

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This Logbook Belongs to:-

Name

House number /name

Street

Town

County

Post Code

Phone (Home)

Mobile

Email

QHS Issued Ref Number

| | | | | | | | |
|--|--|-----|--|-----|--|--------|--|
| Order Replacement Pages from WWW.QHS.org.uk This sect reference is ---- 1/ V1 .1 | | | | | | | |
| Owner | | Ref | | Org | | Office | |

Employing Organisation:-

Name

Address

Number/Name

Street

Town

County

Post Code

Phone

Contact Name

Website

QHS Issued Org Code

QHS Issued Office Code

Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| A1. | Self Respect – self Awareness- self presentation | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| A1.1 | Meets HA's standards of appearance and behaviour | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A1.2 | Has a positive manner at all times | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A1.3 | Understands how role contributes to the business achieving its goals | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A1.4 | Aware of how he/she looks and sounds | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A2. | Personal Impact | | | | | | | |
| A2.1 | Able to assess impact of own feelings on interface with people | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A2.2 | Aware of effect of negative personal feelings on team | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A2.3 | Ability to recognise good performance in ones self | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A2.4 | Aware of reaction to courteous behaviour. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A2.5 | Promotes courteous behaviour through personal use of courtesy. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Managers Name

Date

Signature _____

Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|--|----------------------------|
| Characteristic | Description | Comments |
| A1. | Self Respect – self Awareness- self presentation | |
| A1.1 | Meets HA's standards of appearance and behaviour | |
| A1.2 | Has a positive manner at all times | |
| A1.3 | Understands how role contributes to the business achieving its goals | |
| A1.4 | Aware of how he/she looks and sounds | |
| A2. | Personal Impact | |
| A2.1 | Able to assess impact of own feelings on interface with people | |
| A2.2 | Aware of effect of negative personal feelings on team | |
| A2.3 | Ability to recognise good performance in ones self | |
| A2.4 | Aware of reaction to courteous behaviour. | |

| | | |
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| A2.5 | Promotes courteous behaviour through personal use of courtesy. | |
|------|--|--|

Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| A3. | Respect for Others | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| A3.1 | Considers how others may feel about a situation before they engage with them | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A3.2 | Demonstrates empathy with their customers' or colleagues' situation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A3.3 | Is approachable without jeopardising delivery of existing commitments | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A3.4 | Demonstrates a friendly attitude without overwhelming people | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A3.5 | Deals with people in a fair and non judgmental manner | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A3.5 | Respects confidentiality of people and organisation at all times | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A4 | Empathy | | | | | | | |
| A4.1 | Ability to reflect on how people react to self. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A4.2 | Provision of a confidential environment, if required, to ensure comfort of customer and/or colleague | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A4.3 | Aware of the attitude of other people | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Managers Name

Date

Signature

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| Owner | | Ref | | Org | | Office | |

Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
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| Characteristic | Description | Comments |
| A3. | Respect for Others | |
| A3.1 | Considers how others may feel about a situation before they engage with them | |
| A3.2 | Demonstrates empathy with their customers' or colleagues' situation | |
| A3.3 | Is approachable without jeopardising delivery of existing commitments | |
| A3.4 | Demonstrates a friendly attitude without overwhelming people | |
| A3.5 | Deals with people in a fair and non judgmental manner | |
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| A4 | Empathy | |
| A4.1 | Ability to reflect on how people react to self. | |
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Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|---|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| A5 | Colleagues | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| A5.1 | Aware of team's attitude towards work environment. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A5.2 | Interacts positively with team and colleagues | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A5.3 | Able to provide constructive feedback to raise team's performance | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A5.4 | Able to act on feedback received from colleagues | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A6 | Communication | | | | | | | |
| A6.1 | Is sincere when dealing with others recognising them as individual's | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A6.2 | Consciously reflects on personal attitude and the bearing it has on communication | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A6.3 | Accepts compliments and criticism in an even manner | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Managers Name

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|---|----------------------------|
| Characteristic | Description | Comments |
| A5 | Colleagues | |
| A5.1 | Aware of team's attitude towards work environment. | |
| A5.2 | Interacts positively with team and colleagues | |
| A5.3 | Able to provide constructive feedback to raise team's performance | |
| A5.4 | Able to act on feedback received from colleagues | |
| A6 | Communication | |
| A6.1 | Is sincere when dealing with others recognising them as individual's | |
| A6.2 | Consciously reflects on personal attitude and the bearing it has on communication | |
| A6.3 | Accepts compliments and criticism in an even manner | |
| | | |
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Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| B1 | Behaviour | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| B1.1 | Is open and friendly to all people at all times | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B1.2 | Deals with queries and requests in a positive and professional way | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B1.3 | Uses appropriate body language with colleagues and customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B1.4 | Communicates with people in a way that makes them feel valued and respected | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2 | Building Relationships | | | | | | | |
| B2.1 | Attention is focused on the customer you are dealing with to build a 1:1 relationship | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2.2 | Provides a warm and genuine welcome at the start of each interaction | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2.3 | Answers queries fully and effectively, providing required information and/or alternatives as appropriate | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2.4 | Listens closely to customer to identify their understanding | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2.5 | Check that have fully understood customer's expectations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Managers Name

Date

Signature

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| Owner | | Ref | | Org | | Office | |

Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|--|----------------------------|
| Characteristic | Description | Comments |
| B1 | Behaviour | |
| B1.1 | Is open and friendly to all people at all times | |
| B1.2 | Deals with queries and requests in a positive and professional way | |
| B1.3 | Uses appropriate body language with colleagues and customers | |
| B1.4 | Communicates with people in a way that makes them feel valued and respected | |
| B2 | Building Relationships | |
| B2.1 | Attention is focused on the customer you are dealing with to build a 1:1 relationship | |
| B2.2 | Provides a warm and genuine welcome at the start of each interaction | |
| B2.3 | Answers queries fully and effectively, providing required information and/or alternatives as appropriate | |
| B2.4 | Listens closely to customer to identify their understanding | |
| B2.5 | Check that have fully understood customer's expectations | |

Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| B2 (Cont'd) | Building Relationships (Cont'd) | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| B2.6 | Listening attentively without interruption using appropriate verbal and non verbal body language | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2.7 | Demonstrates an ability to satisfy people's problems and/or advise alternative course. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2.8 | Identifies opportunities to help outside of normal routines and procedures | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B3 | Dealing with Differences | | | | | | | |
| B3.1 | Adapts behaviour to respond effectively to different customer behaviour | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B3.2 | Demonstrates consideration of individual needs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B3.3 | Demonstrates consideration of people's circumstances | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B3.4 | Avoids stereotyping customers in a way that could cause offence | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Managers Name

Date

Signature

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|--|----------------------------|
| Characteristic | Description | Comments |
| B2 (Cont'd) | Building Relationships (Cont'd) | |
| B2.6 | Listening attentively without interruption using appropriate verbal and non verbal body language | |
| B2.7 | Demonstrates an ability to satisfy people's problems and/or advise alternative course. | |
| B2.8 | Identifies opportunities to help outside of normal routines and procedures | |
| B3 | Dealing with Differences | |
| B3.1 | Adapts behaviour to respond effectively to different customer behaviour | |
| B3.2 | Demonstrates consideration of individual needs | |
| B3.3 | Demonstrates consideration of people's circumstances | |
| B3.4 | Avoids stereotyping customers in a way that could cause offence | |
| | | |
| | | |

Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| C1 | Written and ICT Communication Skills | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| C1.1 | Written communication is professional (spelling and grammar) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C1.3 | Language is clear and concise | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C1.5 | Communication follows HA's guidelines | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C1.6 | Language is adapted to meet the individual needs of the customer | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C1.7 | Ensure that the period of time between exchanges in writing or using ICT represents excellent customer service | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2 | Face to Face Meetings | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2.1 | Preparation for meeting is undertaken –appropriate files read etc. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2.2 | Anticipate your customer's requests and needs for information | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2.2 | Needs and comfort of attendees are met with particular respect to Diversity | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2.3 | Establish attendee's requirement's to provide agenda | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2.4 | Mutual agreement on course of action (who, how, when) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Managers Name

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Signature

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
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| Characteristic | Description | Comments |
| C1 | Written and ICT Communication Skills | |
| C1.1 | Written communication is professional (spelling and grammar) | |
| C1.3 | Language is clear and concise | |
| C1.5 | Communication follows HA's guidelines | |
| C1.6 | Language is adapted to meet the individual needs of the customer | |
| C1.7 | Ensure that the period of time between exchanges in writing or using ICT represents excellent customer service | |
| C2 | Face to Face Meetings | |
| C2.1 | Preparation for meeting is undertaken – appropriate files read etc. | |
| C2.2 | Anticipate your customer's requests and needs for information | |
| C2.2 | Needs and comfort of attendees are met with particular respect to Diversity | |
| C2.3 | Establish attendee's requirements to provide agenda | |
| C2.4 | Mutual agreement on course of action (who, how, when) | |

Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|---|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| C3 | Telephone Calls - Inbound | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| C3.1 | Posture upright | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C3.2 | Handset/receiver in correct position | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C3.3 | Call answered promptly | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C3.4 | Smile evident in voice when answering the call | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C3.5 | Customer greeted using HA's guidelines | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C3.6 | Listen closely to customer to identify their precise reason for calling | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C3.7 | Clear message taken for colleague if you are unable to progress | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C3.8 | Summarise the outcome of the call and any actions that you /your customer will take | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C3.9 | Confirm details i.e. name, contact telephone number | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C3.10 | Telephone call closed courteously | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Managers Name

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|---|----------------------------|
| Characteristic | Description | Comments |
| C3 | Telephone Calls - Inbound | |
| C3.1 | Posture upright | |
| C3.2 | Handset/receiver in correct position | |
| C3.3 | Call answered promptly | |
| C3.4 | Smile evident in voice when answering the call | |
| C3.5 | Customer greeted using HA's guidelines | |
| C3.6 | Listen closely to customer to identify their precise reason for calling | |
| C3.7 | Clear message taken for colleague if you are unable to progress | |
| C3.8 | Summarise the outcome of the call and any actions that you /your customer will take | |
| C3.9 | Confirm details i.e. name, contact telephone number | |
| C3.10 | Telephone call closed courteously | |
| | | |

Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| C4 | Telephone Calls - Outbound | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| C4.1 | Call opened using HA's guidelines | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C4.2 | Purpose of call is stated – referring to any previous interaction | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C4.3 | Content of message is delivered in a clear & succinct manner | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C4.4 | Recipient is given time to respond | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C4.5 | Call drawn to a conclusion courteously | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C4.6 | Promises to call back are kept | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C5 | Telephone Calls - Redirection | | | | | | | |
| C5.1 | Caller informed about your actions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C5.2 | Caller advised of the name of the person/department to whom they will be speaking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C5.3 | Colleague who receives the transferred call is aware of transfer & details/requirements (subject to available systems) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C5.4 | Colleague who receives the transferred call is aware of caller's requirements | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Managers Name

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|--|----------------------------|
| Characteristic | Description | Comments |
| C4 | Telephone Calls - Outbound | |
| C4.1 | Call opened using HA's guidelines | |
| C4.2 | Purpose of call is stated – referring to any previous interaction | |
| C4.3 | Content of message is delivered in a clear & succinct manner | |
| C4.4 | Recipient is given time to respond | |
| C4.5 | Call drawn to a conclusion courteously | |
| C4.6 | Promises to call back are kept | |
| C5 | Telephone Calls - Redirection | |
| C5.1 | Caller informed about your actions | |
| C5.2 | Caller advised of the name of the person/department to whom they will be speaking | |
| C5.3 | Colleague who receives the transferred call is aware of transfer & details/requirements (subject to available systems) | |
| C5.4 | Colleague who receives the transferred call is aware of caller's requirements | |

Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| C6 | Telephone Calls – On Hold | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| C6.1 | Request permission from caller to put them on hold | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C6.2 | Caller advised duration of being on hold | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C6.3 | Acknowledgement of Caller’s response | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C6.4 | On return to caller individual thanks the customer for holding | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D1 | Skills of Listening | | | | | | | |
| D1.1 | Body Language demonstrates an interest | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D1.2 | Attitude towards speaker is sincere | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D1.3 | Concentration focused on speaker throughout interface | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D1.4 | Affirmation of content/requirement | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D1.5 | Respond appropriately towards speaker | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D1.6 | Aware of speaker’s attitude and feelings | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|--|----------------------------|
| Characteristic | Description | Comments |
| C6 | Telephone Calls – On Hold | |
| C6.1 | Request permission from caller to put them on hold | |
| C6.2 | Caller advised duration of being on hold | |
| C6.3 | Acknowledgement of Caller’s response | |
| C6.4 | On return to caller individual thanks the customer for holding | |
| D1 | Skills of Listening | |
| D1.1 | Body Language demonstrates an interest | |
| D1.2 | Attitude towards speaker is sincere | |
| D1.3 | Concentration focused on speaker throughout interface | |
| D1.4 | Affirmation of content/requirement | |
| D1.5 | Respond appropriately towards speaker | |
| D1.6 | Aware of speaker’s attitude and feelings | |

Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| D2 | Impact of Good Listening Skills | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| D.2.1 | Attentive towards speaker | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.2 | Observe verbal and non verbal clues | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.3 | Nature of issue established | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.4 | Empathy with customer | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.5 | Details of issue recorded accurately | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.6 | Ability to reach a mutual agreement on the course of action to rectify the situation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.7 | Patience demonstrated throughout interface | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.8 | Interface concluded politely | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.9 | Feedback sought from customer in accordance with HA standards | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|--|----------------------------|
| Characteristic | Description | Comments |
| D2 | Impact of Good Listening Skills | |
| D.2.1 | Attentive towards speaker | |
| D.2.2 | Observe verbal and non verbal clues | |
| D.2.3 | Nature of issue established | |
| D.2.4 | Empathy with customer | |
| D.2.5 | Details of issue recorded accurately | |
| D.2.6 | Ability to reach a mutual agreement on the course of action to rectify the situation | |
| D.2.7 | Patience demonstrated throughout interface | |
| D.2.8 | Interface concluded politely | |
| D.2.9 | Feedback sought from customer in accordance with HA standards | |
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Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| E1 | Personal Commitment | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| E1.4 | Ensures work area is tidy, safe and organised efficiently | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E1.5 | Prepares everything needed to deal with customers daily. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E1.7 | Meets deadlines | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2 | Good Business Practice | | | | | | | |
| E2.1 | Able to list HA's products/services | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.2 | Identifies needs & requirements & offers appropriate service | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.3 | Works in a way that shows awareness of the HA's regulations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.4 | Takes responsibility for situation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.5 | Quickly locates information | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.6 | Updates existing customer information | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|--|----------------------------|
| Characteristic | Description | Comments |
| E1 | Personal Commitment | |
| E1.4 | Ensures work area is tidy, safe and organised efficiently | |
| E1.5 | Prepares everything needed to deal with customers daily. | |
| E1.7 | Meets deadlines | |
| E2 | Good Business Practice | |
| E2.1 | Able to list HA's products/services | |
| E2.2 | Identifies needs & requirements & offers appropriate service | |
| E2.3 | Works in a way that shows awareness of the HA's regulations | |
| E2.4 | Takes responsibility for situation | |
| E2.5 | Quickly locates information | |
| E2.6 | Updates existing customer information | |
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Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| E2 | Good Business Practice (continued) | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| E2.7 | Has knowledge of process required by HA for issue handling | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.8 | Works to the limits of what allowed to do | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.9 | Refers to someone in authority when needs to | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.10 | Ensures information is passed on to relevant parties | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.11 | Works to make the best of the available resources | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.12 | Explains clearly to customers when their needs cannot be met | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|--|----------------------------|
| Characteristic | Description | Comments |
| E2 | Good Business Practice (continued) | |
| E2.7 | Has knowledge of process required by HA for issue handling | |
| E2.8 | Works to the limits of what allowed to do | |
| E2.9 | Refers to someone in authority when needs to | |
| E2.10 | Ensures information is passed on to relevant parties | |
| E2.11 | Works to make the best of the available resources | |
| E2.12 | Explains clearly to customers when their needs cannot be met | |
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Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|---|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| E3 | Complaint Handling | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| E3.1 | Empathetic to attitude of customer, i.e. appreciates why they may be angry, possibly overly assertive or aggressive | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E3.2 | Recognises when something may be a problem from the customer's point of view | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E3.3 | Reassures customer that they will take personal responsibility to get issue resolved as quickly as possible. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E3.4 | Calms customers where situation is adversely affecting other customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E3.5 | Clarifies understanding of issue | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E3.6 | Clearly states action that will be taken | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E3.7 | Offers compensation where necessary | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E3.8 | Involves other team members/departments as appropriate | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E3.9 | Complaint/concern logged into system | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E3.10 | Follows up with colleague/customer in accordance with HA's SLAs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|---|----------------------------|
| Characteristic | Description | Comments |
| E3 | Complaint Handling | |
| E3.1 | Empathetic to attitude of customer, i.e. appreciates why they may be angry, possibly overly assertive or aggressive | |
| E3.2 | Recognises when something may be a problem from the customer's point of view | |
| E3.3 | Reassures customer that they will take personal responsibility to get issue resolved as quickly as possible. | |
| E3.4 | Calms customers where situation is adversely affecting other customers | |
| E3.5 | Clarifies understanding of issue | |
| E3.6 | Clearly states action that will be taken | |
| E3.7 | Offers compensation where necessary | |
| E3.8 | Involves other team members/departments as appropriate | |
| E3.9 | Complaint/concern logged into system | |
| E3.10 | Follows up with colleague/customer in accordance with HA's SLAs | |
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Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| E4 | Awareness of Service Improvement Opportunities | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| E4.1 | Customer made aware of the opportunity to provide comments on service provided. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E4.2 | Listen carefully to customers about problems they have raised. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E4.3 | Identify the options for resolving a customer service problem | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E4.4 | Considers feedback against procedures and instigates action to adapt, amend, upgrade them within business' change control procedures | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|--|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| F1 | Ability to Change | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| F1.1 | Responsive to feedback received from customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F1.2 | Responsive to feedback received from colleagues | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F1.3 | Carry out a self assessment of your performance and identify your strengths, weaknesses and development needs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F1.4 | Regularly review your progress towards your objectives with an appropriate person | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F1.5 | Work with others to establish what you need to know to be able to work effectively in your customer service role | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Performance Review:-

| From QHS Criteria | | To be completed by Manager | | | | | | |
|-------------------|---|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| F2 | Development of Personal Listening Skills | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| F2.1 | Reflection on personal ability carried out | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F2.2 | Share with colleagues how particular words and approaches help to support the service offer, vision and promise | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F2.3 | Discussion with first line management on ability to listen to customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F2.4 | Feedback from customers is acted upon | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F3 | Monitoring of Performance | | | | | | | |
| F3.1 | Customer satisfaction monitored | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F3.2 | Personal Performance monitored | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Performance Review:- (comments)

| From QHS Criteria | | To be completed by Manager |
|-------------------|---|----------------------------|
| Characteristic | Description | Comments |
| F2 | Development of Personal Listening Skills | |
| F2.1 | Reflection on personal ability carried out | |
| F2.2 | Share with colleagues how particular words and approaches help to support the service offer, vision and promise | |
| F2.3 | Discussion with first line management on ability to listen to customers | |
| F2.4 | Feedback from customers is acted upon | |
| F3 | Monitoring of Performance | |
| F3.1 | Customer satisfaction monitored | |
| F3.2 | Personal Performance monitored | |
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Self assessment:-

| From QHS Criteria | | To be completed by Individual | | | | | | |
|-------------------|--|-------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| A1 | Self Respect - Self Awareness - Self Presentation | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| A1.4 | Aware of how he/she looks and sounds | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A2 | Personal Impact | | | | | | | |
| A2.1 | Able to assess impact of own feelings on interface with people | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A2.2 | Aware of effect of negative personal feelings on team | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A2.3 | Ability to recognise good performance in ones self | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A2.4 | Aware of reaction to courteous behaviour. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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| Owner | | Ref | | Org | | Office | |

Self Assessment:- (Notes)

| From QHS Criteria | | To be completed by Individual |
|-------------------|--|-------------------------------|
| Characteristic | Description | Notes |
| A1 | Self Respect - Self Awareness - Self Presentation | |
| A1.4 | Aware of how he/she looks and sounds | |
| A2 | Personal Impact | |
| A2.1 | Able to assess impact of own feelings on interface with people | |
| A2.2 | Aware of effect of negative personal feelings on team | |
| A2.3 | Ability to recognise good performance in ones self | |
| A2.4 | Aware of reaction to courteous behaviour. | |
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Self assessment:-

| From QHS Criteria | | To be completed by Individual | | | | | | |
|-------------------|---|-------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| A4 | Empathy | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| A4.1 | Ability to reflect on how people react to self. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A5 | Colleagues | | | | | | | |
| A5.1 | Aware of team's attitude towards work environment. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A5.2 | Interacts positively with team and colleagues | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A5.4 | Able to act on feedback received from colleagues | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A6 | Communication | | | | | | | |
| A6.2 | Consciously reflects on personal attitude and the bearing it has on communication | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A6.3 | Accepts compliments and criticism in an even manner | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Notes
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Individual's Name

Date

Signature _____

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| Order Replacement Pages from WWW.QHS.org.uk This sect reference is ---- 4/ V1 .1 | | | | | | | |
| Owner | | Ref | | Org | | Office | |

Self Assessment:- (Notes)

| From QHS Criteria | | To be completed by Individual |
|-------------------|---|-------------------------------|
| Characteristic | Description | Notes |
| A4 | Empathy | |
| A4.1 | Ability to reflect on how people react to self. | |
| A5 | Colleagues | |
| A5.1 | Aware of team's attitude towards work environment. | |
| A5.2 | Interacts positively with team and colleagues | |
| A5.4 | Able to act on feedback received from colleagues | |
| A6 | Communication | |
| A6.2 | Consciously reflects on personal attitude and the bearing it has on communication | |
| A6.3 | Accepts compliments and criticism in an even manner | |
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Self assessment:-

| From QHS Criteria | | To be completed by Individual | | | | | | |
|-------------------|--|-------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| B3 | Dealing with Differences | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| B3.1 | Adapts behaviour to respond effectively to different customer behaviour | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B3.4 | Avoids stereotyping customers in a way that could cause offence | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C1 | Written and ICT Communication Skills | | | | | | | |
| C1.5 | Communication follows HA's guidelines | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C1.7 | Ensure that the period of time between exchanges in writing or using ICT represents excellent customer service | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2 | Face to Face Meetings | | | | | | | |
| C2.1 | Preparation for meeting is undertaken –appropriate files read etc. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2.2 | Anticipate your customer's requests and needs for information | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2.2 | Needs and comfort of attendees are met with particular respect to Diversity | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2.3 | Establish attendee's requirement's to provide agenda | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C2.4 | Mutual agreement on course of action (who, how, when) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Notes
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Individual's Name

Date

Signature

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| Owner | | Ref | | Org | | Office | |

Self Assessment:- (Notes)

| From QHS Criteria | | To be completed by Individual |
|-------------------|--|-------------------------------|
| Characteristic | Description | Notes |
| B3 | Dealing with Differences | |
| B3.1 | Adapts behaviour to respond effectively to different customer behaviour | |
| B3.4 | Avoids stereotyping customers in a way that could cause offence | |
| C1 | Written and ICT Communication Skills | |
| C1.5 | Communication follows HA's guidelines | |
| C1.7 | Ensure that the period of time between exchanges in writing or using ICT represents excellent customer service | |
| C2 | Face to Face Meetings | |
| C2.1 | Preparation for meeting is undertaken – appropriate files read etc. | |
| C2.2 | Anticipate your customer's requests and needs for information | |
| C2.2 | Needs and comfort of attendees are met with particular respect to Diversity | |
| C2.3 | Establish attendee's requirements to provide agenda | |
| C2.4 | Mutual agreement on course of action (who, how, when) | |

Self assessment:-

| From QHS Criteria | | To be completed by Individual | | | | | | |
|-------------------|--|-------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| E1 | Personal Commitment | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| E1.1 | Aware of Association's requirements of Self. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E1.2 | Demonstrates commitment to the HA's Mission and Values | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E1.3 | Explains why good customer service is important for the HA | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E1.4 | Ensures work area is tidy, safe and organised efficiently | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E1.5 | Prepares everything needed to deal with customers daily. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E1.6 | Allocates time with customers according to HA guidelines | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E1.7 | Meets deadlines | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E1.8 | Keeps promises to customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Notes
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Individual's Name

Date

Signature _____

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| Owner | | Ref | | Org | | Office | |

Self Assessment:- (Notes)

| From QHS Criteria | | To be completed by Individual |
|-------------------|--|-------------------------------|
| Characteristic | Description | Notes |
| E1 | Personal Commitment | |
| E1.1 | Aware of Association's requirements of Self. | |
| E1.2 | Demonstrates commitment to the HA's Mission and Values | |
| E1.3 | Explains why good customer service is important for the HA | |
| E1.4 | Ensures work area is tidy, safe and organised efficiently | |
| E1.5 | Prepares everything needed to deal with customers daily. | |
| E1.6 | Allocates time with customers according to HA guidelines | |
| E1.7 | Meets deadlines | |
| E1.8 | Keeps promises to customers | |
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Self assessment:-

| From QHS Criteria | | To be completed by Individual | | | | | | |
|-------------------|---|-------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| E2 | Good Business Practice | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| E2.1 | Able to list HA's products/services | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.3 | Works in a way that shows awareness of the HA's regulations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.5 | Quickly locates information | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.6 | Updates existing customer information | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.7 | Has knowledge of process required by HA for issue handling | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.9 | Refers to someone in authority when needs to | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.10 | Ensures information is passed on to relevant parties | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E2.11 | Works to make the best of the available resources | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Notes
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Individual's Name

Date

Signature _____

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| Owner | | Ref | | Org | | Office | |

Self Assessment:- (Notes)

| From QHS Criteria | | To be completed by Individual |
|-------------------|---|-------------------------------|
| Characteristic | Description | Notes |
| E2 | Good Business Practice | |
| E2.1 | Able to list HA's products/services | |
| E2.3 | Works in a way that shows awareness of the HA's regulations | |
| E2.5 | Quickly locates information | |
| E2.6 | Updates existing customer information | |
| E2.7 | Has knowledge of process required by HA for issue handling | |
| E2.9 | Refers to someone in authority when needs to | |
| E2.10 | Ensures information is passed on to relevant parties | |
| E2.11 | Works to make the best of the available resources | |
| | | |
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Self assessment:-

| From QHS Criteria | | To be completed by Individual | | | | | | |
|-------------------|---|-------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| F1 | Ability to Change | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| F1.3 | Carry out a self assessment of your performance and identify your strengths, weaknesses and development needs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F2 | Development of Personal Listening Skills | | | | | | | |
| F2.1 | Reflection on personal ability carried out | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F2.2 | Share with colleagues how particular words and approaches help to support the service offer, vision and promise | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F2.3 | Discussion with first line management on ability to listen to customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F3 | Monitoring of Performance | | | | | | | |
| F3.1 | Customer satisfaction monitored | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F3.2 | Personal Performance monitored | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Notes
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Individual's Name

Date

Signature _____

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| Order Replacement Pages from WWW.QHS.org.uk This sect reference is ---- 4/ V1 .1 | | | | | | | |
| Owner | | Ref | | Org | | Office | |

Self Assessment:- (Notes)

| From QHS Criteria | | To be completed by Individual |
|-------------------|---|-------------------------------|
| Characteristic | Description | Notes |
| F1 | Ability to Change | |
| F1.3 | Carry out a self assessment of your performance and identify your strengths, weaknesses and development needs | |
| F2 | Development of Personal Listening Skills | |
| F2.1 | Reflection on personal ability carried out | |
| F2.2 | Share with colleagues how particular words and approaches help to support the service offer, vision and promise | |
| F2.3 | Discussion with first line management on ability to listen to customers | |
| F3 | Monitoring of Performance | |
| F3.1 | Customer satisfaction monitored | |
| F3.2 | Personal Performance monitored | |
| | | |
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| | | |

Independent assessment:-

| From QHS Criteria | | To be completed at assessment /Training day by Trainer | | | | | | |
|-------------------|--|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| B1 | Behaviour | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| B1.3 | Uses appropriate body language with colleagues and customers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B1.4 | Communicates with people in a way that makes them feel valued and respected | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2.2 | Building Relationships | | | | | | | |
| B2.3 | Provides a warm and genuine welcome at the start of each interaction | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2.4 | Answers queries fully and effectively, providing required information and/or alternatives as appropriate | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B2.7 | Listens closely to customer to identify their understanding | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Demonstrates an ability to satisfy people's problems and/or advise alternative course. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Comment
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Assessor's Name

Date

Signature

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| Order Replacement Pages from WWW.QHS.org.uk This sect reference is ---- 5/ V1 .1 | | | | | | | |
| Owner | | Ref | | Org | | Office | |

Independent Assessment:- (comments)

| From QHS Criteria | | To be completed at assessment /Training day by Trainer |
|-------------------|--|--|
| Characteristic | Description | Comments |
| B1 | Behaviour | |
| B1.3 | Uses appropriate body language with colleagues and customers | |
| B1.4 | Communicates with people in a way that makes them feel valued and respected | |
| B2.2 | Building Relationships | |
| B2.3 | Provides a warm and genuine welcome at the start of each interaction | |
| B2.4 | Answers queries fully and effectively, providing required information and/or alternatives as appropriate | |
| B2.7 | Listens closely to customer to identify their understanding | |
| | Demonstrates an ability to satisfy people's problems and/or advise alternative course. | |
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Independent assessment:-

| From QHS Criteria | | To be completed at assessment /Training day by Trainer | | | | | | |
|-------------------|--|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| C1 | Written and ICT Communication Skills | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| C1.1 | Written communication is professional (spelling and grammar) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C1.2 | Greeting of letter is personalised (i.e. not Dear Sir/Madam/Tenant) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C1.3 | Language is clear and concise | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C1.4 | The purpose of your communication is made clear as early as possible | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Comment
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Assessor's Name

Date

Signature

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| Order Replacement Pages from WWW.QHS.org.uk This sect reference is ---- 5/ V1 .1 | | | | | | | |
| Owner | | Ref | | Org | | Office | |

Independent assessment:-

| From QHS Criteria | | To be completed at assessment /Training day by Trainer | | | | | | |
|-------------------|--|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Characteristic | Description | Assessment | | | | | | |
| D2 | Impact of Good Listening Skills | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
| D.2.1 | Attentive towards speaker | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.2 | Observe verbal and non verbal clues | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.3 | Nature of issue established | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.4 | Empathy with customer | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.5 | Details of issue recorded accurately | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.6 | Ability to reach a mutual agreement on the course of action to rectify the situation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.7 | Patience demonstrated throughout interface | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.8 | Interface concluded politely | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D.2.9 | Feedback sought from customer in accordance with HA standards | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Comment
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Assessor's Name

Date

Signature _____

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|--|--|-----|--|-----|--|--------|--|
| Order Replacement Pages from WWW.QHS.org.uk This sect reference is ---- 5/ V1 .1 | | | | | | | |
| Owner | | Ref | | Org | | Office | |

Independent Assessment:- (comments)

| From QHS Criteria | | To be completed at assessment /Training day by Trainer |
|-------------------|--|--|
| Characteristic | Description | Comments |
| D2 | Impact of Good Listening Skills | |
| D.2.1 | Attentive towards speaker | |
| D.2.2 | Observe verbal and non verbal clues | |
| D.2.3 | Nature of issue established | |
| D.2.4 | Empathy with customer | |
| D.2.5 | Details of issue recorded accurately | |
| D.2.6 | Ability to reach a mutual agreement on the course of action to rectify the situation | |
| D.2.7 | Patience demonstrated throughout interface | |
| D.2.8 | Interface concluded politely | |
| D.2.9 | Feedback sought from customer in accordance with HA standards | |
| | | |
| | | |

Personal development Plan:-

| | | | |
|---------------------|------------------|-------|-------------------------------|
| COVERING THE PERIOD | | FROM: | TO : |
| Key Dates | What did you do? | Why? | What did you learn from this? |
| | | | |

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| Owner | | Ref | | Org | | Office | |

| Key Date | How have/will you use this? Any further action? |
|----------|--|
| | |

Using This Logbook:-

This log book is part of a suite of documents used to ensure certificated individuals maintain the appropriate behaviours to stay on the QHS register. It is used to assess individuals in conjunction with their application, the results of the assessment completed during training and the completed scenario based test. The log book should be completed and signed off annually and returned to QHS to enable the updating of the register. It should be noted that the application and 3rd party assessment are one off event's whereas the assessment by manager and Scenario based tests are annual

Successfully registered individuals are issued with an annual certificate and membership ID / Badge. In order to be successfully certificated you must achieve performance score in excess of those laid out in the table contained in appendix 3 of this document for each of the 6 component elements of the criteria.

QHS Scoring Mechanism:-

| Score | Measures of frequency | Measures of volume | Measures of customer care | Measures of evidence | Manager's assessment |
|-------|-----------------------|--------------------|---------------------------|------------------------|----------------------|
| 0 | Not Assessed | Not Assessed | Not Assessed | Not Assessed | Not Observed |
| 1 | Not at all | None | None | None | Not Exhibited |
| 2 | Occasionally | Few | Little | Little | Very Unsatisfactory |
| 3 | Sometimes | Some | Some | Some | Unsatisfactory |
| 4 | Often | Many | Much | Evidence | Satisfactory |
| 5 | Mostly | Most | Most | Clear evidence | Very satisfactory |
| 6 | Always | All | All | Comprehensive evidence | Excellent |

Certification rules/table

In order to meet the certification criteria an individual must achieve the following:

- a. They must perform to the level of achievement¹ required for certification in all six component areas of service as identified in the “Criteria for Individual service Excellence”
- b. They must have been measured sufficiently robustly to ensure confidence in the achievement above, this means that their performance must exceed the count² for coverage of all characteristics for each of the component elements detailed within the “Criteria for Individual Service Excellence”

| <u>Service component</u> | <u>Certification Target (Column A)</u> | <u>% Count Required (Column B)</u> |
|---------------------------------|---|---|
| 3.A Feel Good About Yourself | % | % |
| 3.B Practice Courtesy | % | % |
| 3.C Positive Language | % | % |
| 3.D Listening Actively | % | % |
| 3.E Performance | % | % |
| 3.F Learning | % | % |

¹ See Certification Table Column A) Certification Targets.

² See Certification Table Column B) Median counts