

New Team Member Performance Metrics

Instructions: Please make a copy of this document and remove any rubrics that the team member does not participate in based on their hired role during their onboarding period.

Overview: For all roles, the Writing and Verbal Skills and Professional Competencies rubrics are to be filled out by a current Onboarding & Education Specialist during the introductory period for each tier of training the team member is involved in dependent upon their specific education path. Please use the comments section to specify individual strengths and areas of opportunity that differ from the overall grade. Additional rubrics for Chat, Onboarding calls, or other specific training tiers should be completed or removed based on the team member's role and education path.

Additional notes and examples can be found here for reference if necessary: [New Team Member Rubric Notes](#).

Team Member Name:

Team Member Role:

Hire Date:

End of Introductory Period Date:

Table of Contents

Table of Contents	1
Product Tier 1	3
Week 2 check-in notes:	3
Product Tier 1, cont.	4
Writing & Verbal Skills	4
Professional Competencies	8
Onboarding Calls	12
Insurance Tier 1	14
Week 6 check-in notes:	14
Insurance Tier 1, cont.	15
Writing & Verbal Skills	15
Professional Competencies	19
Chat	23
Product Tier 2	26
Week 10 check-in notes:	27
Product Tier 2, cont.	27
Writing & Verbal Skills	28
Professional Competencies	31
Insurance Tier 2	35
Week 14 check-in notes and rubric evaluations:	35
Insurance Tier 2, cont.	36

Writing & Verbal Skills	36
Professional Competencies	39
Phone Support Specialist (ZenDesk Talk)	43
90 Day or 12 Week Check-in:	45
Writing & Verbal Skills	45
Professional Competencies	48

Product Tier 1

Evaluator/Educator:

Week: 2

Date:

Week 2 check-in notes:

Product Tier 1, cont.

Evaluator/Educator:

Week: 4

Date:

Writing & Verbal Skills

Overview: The Writing and Verbal Skills rubric measures team member performance related to customer interactions. Performance is measured by reviewing a team member's customer replies for specific skills that include but are not limited to: accurate product knowledge, clarity of communication including language, grammar, syntax, and formatting as they directly affect a customer's experience with our Customer Success team and use of SimplePractice.

Category:	Score Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					Total Score
	1	2	3	4	5	50

1.Content & Product Knowledge	<ul style="list-style-type: none"> The team member provides accurate workflows and product information less than 60% of the time. HIPAA guidelines and/or Admin processes are not followed, and resources are not consistently provided within their replies. Frequent areas of opportunity to include more accurate content and product knowledge, complete workflows, or additional context. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 60-90% of the time. HIPAA guidelines are adhered to, most Admin processes are followed, and resources are included but not consistently. There are specific areas of opportunity in their content and product knowledge such as more accurate information, more complete workflows, or the opportunity to provide additional context about an issue. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 90% or more of the time. HIPAA guidelines are adhered to, Admin processes are followed, and resources are included. Their content and product knowledge is consistent, precise, and edited for the customer's workflow accurately. 	
Writing score (tickets, Chat)						
Verbal score (calls, classes)						
Comments:	Matty is always quick to participate and offer answers in huddles. He has gotten a few tricky workflow PT1 tickets so far, and has done very well at deciphering what to do in those situations.					
2. Communication Ability and Competence	<ul style="list-style-type: none"> Questions are not identified correctly, or answered directly in a reply. Opportunities to request clarifying information are missed. Information and workflow processes are difficult to navigate or follow, and/or are incorrect. 		<ul style="list-style-type: none"> Questions are identified and answered, but there are areas of opportunity to organize information as to answer more directly or immediately in a reply. Clarifying questions and requests for information are not asked consistently when appropriate, and resources are mostly meaningfully related, but sometimes are tangential. Information and workflows display thoughtfulness, but clearly demonstrate areas needed for growth. 		<ul style="list-style-type: none"> The team member identifies the issue and answers questions in a correct, direct, and timely manner. Appropriate information is requested when necessary to answer, and the team member provides meaningful and related resources. Information and workflow processes are written in a manageable and easily navigated format. 	
Writing (tickets, Chat)						
Verbal (calls, classes)						
Comments:	While Matty has all of the correct information and he requests information when appropriate in a timely manner, in both the Insurance Presentation and in initial tickets, he often has the information but does not provide enough of a breakdown for the customer. Regina and I recommended that he involves more step-by-step information in his responses, and I have since seen his responses improve.					

3. Vocabulary and Language	<ul style="list-style-type: none"> Multiple areas of opportunity to develop a more precise understanding of SimplePractice company- and product-related language (such as features, groups, and resources). Appropriate language and vocabulary are not used consistently, or are not consistent with current expectations, processes, or procedures. 		<ul style="list-style-type: none"> The team member shows an understanding of SimplePractice company- and product-related language (such as features, groups, and resources), but some inconsistencies are present. Appropriate language and vocabulary are used most of the time, but areas of opportunity to use more precise or appropriate language or vocabulary are present. 		<ul style="list-style-type: none"> SimplePractice company- and product-related language (such as features, groups, and resources) are reflected correctly in all customer correspondences (tickets, Chats, and calls). Additionally, language and vocabulary used is consistent with current expectations, processes, and procedures. 	
Writing (tickets, Chat)						
Verbal (calls, classes)						
Comments:	<p>Even though Matty expressed early on that it would be difficult to switch from the vocabulary he was used to in the medical field, I have never felt this area to be lacking. His vocabulary and language is at exactly where I would expect anyone at SimplePractice's to be at this point of training.</p>					
4. Formatting	<ul style="list-style-type: none"> Formatting does not follow guidelines, including spacing, bolding, and the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists to craft clear replies. Resources and hyperlinks are not consistently bolded and embedded within text. Paragraph breaks are highly irregular or overly frequent, such that they bear no relation to the organization of the content of the reply. 		<ul style="list-style-type: none"> Formatting follows guidelines most of the time, but reflects areas of inconsistency in terms of spacing (paragraphs, sentences, etc.), bolding (navigational steps and action items), the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists, and how resources and hyperlinks are formatted. Content is clear and appropriately concise most of the time. 		<ul style="list-style-type: none"> Formatting guidelines such as spacing (paragraphs, sentences, etc.), bolding (navigational steps and action items), and the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists are consistently used correctly. Resources and hyperlinks are consistently bolded and embedded in text. Paragraph breaks reinforce the content organization so that information is clear and manageable. 	
Writing (tickets, Chat)						
Comments:	<p>I saw Matty manipulate more bullets/numbered lists in his scenarios, and in tickets, I have seen less of these. Instead, sometimes the information is in a giant paragraph, which is difficult for the customer to digest. I recommend that he breaks the information down a little more for the customers.</p>					
5. Grammar	<ul style="list-style-type: none"> Frequent grammatical lapses, incorrect language, and/or poor syntax interfere with the meaning of the replies. Verb tense and subject-verb agreement are not constructed correctly. Substantial need for editing. 		<ul style="list-style-type: none"> Occasional grammatical lapses, incorrect language, and/or poor syntax. Some opportunities for editing exist, but are not severe enough to impact the meaning of the reply. Verb tense and subject-verb agreement are generally constructed correctly with minor 		<ul style="list-style-type: none"> Replies are constructed with correct and consistent grammar and language. Syntax is crafted correctly, with no run-on sentences or sentence fragments, producing clear logical replies. <ul style="list-style-type: none"> Verb tense and subject-verb agreement are constructed correctly 	

			inconsistencies.		with minor inconsistencies.	
Writing (tickets, Chat)						
Comments:	I have no concerns with Matty's grammar- he is exactly where I would like any CS Team Member to be.					
6. Punctuation	<ul style="list-style-type: none"> Basic punctuation tends to be omitted, haphazard, or incorrect, often including both internal sentence punctuation and end-of-sentence punctuation. 		<ul style="list-style-type: none"> Generally the end-of-sentence punctuation is correct, but internal punctuation (e.g., commas) may sometimes be incorrect. Only minor instances where punctuation is forgotten or missed. 		<ul style="list-style-type: none"> Effective and correct use of punctuation to separate sentences and their elements to clarify meaning. Punctuation is not missed or forgotten. Punctuation reflects tone (e.g., exclamation points are avoided unless use is initiated by the customer, and then only used with care while maintaining a professional tone). 	
Writing (tickets, Chat)						
Comments:	I have no concerns with Matty's punctuation- he is exactly where I would like any CS Team Member to be.					
7. Mechanics: Capitalization, Spelling, & Numerals	<ul style="list-style-type: none"> Capitalization is inconsistent and appears random. Numerous spelling errors or typos. Readability and meaning of replies are significantly impaired, reflecting numerous opportunities for extensive editing. 		<ul style="list-style-type: none"> Capitalization is generally consistent and accurate. Errors, if any, are minor. Spelling is usually correct, and there are few typos. The meaning and readability of replies are not impaired due to mechanics. 		<ul style="list-style-type: none"> Capitalization is correct and follows writing mechanical guidelines (e.g., the first word of a sentence and proper nouns are all capitalized). Additionally, SimplePractice features, resources, and language within the product are all referenced with correct capitalization. Spelling is consistently correct, and there are no typos. 	
Writing (tickets, Chat)						
Comments:	Matty's spelling and numerals are exactly where I would like any CS Team Member to be. The loss of one point is for inconsistencies in which SimplePractice pronouns are capitalized throughout his training tickets. I have no concerns that in the coming weeks, he will match this guru card: Vocabulary in tickets .					

Week 4 check-in notes and rubric evaluations:

Other collaborating educator comments:

Professional Competencies

Overview: The Professional Competencies rubric measures a team member's daily work, outside of tickets and calls, including soft skills that influence a team member's productivity and performance. These skills reflect our company culture and include but are not limited to: organization and time management, communication, resourcefulness, initiative, and accountability.

Category:	Score Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					Total Score
	1	2	3	4	5	35
1. Time Management: Customer replies	<ul style="list-style-type: none"> The team member consistently struggles to send out tickets requiring a reply within 24 hours. The team member often waits longer than 10-15 minutes to ask questions or investigate an issue to develop a reply showing extensive areas of opportunity for improvement in time-management. 		<ul style="list-style-type: none"> Tickets requiring a reply are almost always replied to within 24 hours. Inconsistencies in reply time are rare. The team member shows opportunity for improvement when asking questions or investigating within the 10-15 minute guideline, often taking longer to develop a reply. 		<ul style="list-style-type: none"> Tickets requiring a reply are followed-up within 24 hours. Questions are asked in an appropriate time frame (i.e., 15 minutes). The team member allocates their time appropriately when investigating and writing a ticket reply (i.e., 15 minutes within the first 6 weeks, and 10-15 minutes within the second 6 weeks). 	

Comments:						
2. Resource Utilization and Investigative Skills	<ul style="list-style-type: none"> The team member struggles to grasp adequate understanding of how to utilize company resources (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not utilized when necessary to gather context or ask questions. The team member doesn't display solution-oriented thinking, and often does not utilize resources to investigate or test an issue. 		<ul style="list-style-type: none"> The team member understands company resources, but fails at times to utilize them appropriately (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not consistently but often are utilized to ask questions and gather context when necessary. The team member displays some investigation or testing in their training account when asking questions, but on minor occasions doesn't utilize resources to investigate an issue. 		<ul style="list-style-type: none"> The team member understands and uses company resources to find answers (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are used when necessary to gather context and facilitate efficient question asking. Solution-oriented thinking is displayed. The team member can discuss what they've already investigated, tested in their training account, or the resources used when asking questions. 	
Comments:						
3. Receptiveness and Responsiveness to Feedback	<ul style="list-style-type: none"> The team member struggles to acknowledge and understand feedback, and rarely asks for clarification if needed. They are not self-motivated, and do not take actionable steps on strategies for improvement when necessary. They struggle to review their progress, and do not make noticeable improvements in response to feedback. 		<ul style="list-style-type: none"> The team member acknowledges and understands feedback, and asks for clarity most times. Self-motivated, and they take actionable steps on strategies for improvement when necessary. They irregularly review their progress, and make minor or slow improvements in response to feedback. 		<ul style="list-style-type: none"> The team member always acknowledges and understands feedback, and asks for clarity when necessary. They are self-motivated and take actionable steps on strategies for improvement. They regularly review their progress, and make noticeable and productive improvements in response to feedback. 	
Comments:						
4. Initiative	<ul style="list-style-type: none"> The team member does not engage in requesting feedback. There is little to no proactive feedback provided in relation to the group's goals, and is often not delivered to the person(s) who can make change. The team member may mention ideas or points of improvement, but they fail to follow up in the proper forums. 		<ul style="list-style-type: none"> The team member shows areas of opportunity to request feedback more proactively. The team member occasionally provides meaningful feedback to the individual(s) who can make change, but there are opportunities to develop. Initiative is inconsistent when they have ideas or see areas of improvement, and 		<ul style="list-style-type: none"> The team member is engaged, proactive in asking questions, and appropriately requests feedback. They are proactive in providing meaningful feedback related to the group's goals, and provide it to the individual(s) who can make change. 	

	<ul style="list-style-type: none"> When possible and appropriate, there is little initiative to respond to or assist peers. 		<p>are only sometimes followed up with (e.g., Knowledge Requests, speaking with product squad members, or adding suggestions to the Training board).</p> <ul style="list-style-type: none"> When possible and appropriate, there is inconsistent initiative to respond to or assist peers. 		<ul style="list-style-type: none"> Initiative is taken when they have ideas or see areas of improvement to follow up in the proper forum (e.g., Knowledge Requests, speaking with Product Squad members, or adding suggestions to the Training board). When possible and appropriate, they are responsive and helpful to peers when coverage is needed or questions are asked. They are engaged in education and group discussions. 	
Comments:						
5. Accountability	<ul style="list-style-type: none"> The team member struggles to take ownership of job responsibilities, and doesn't take ownership of mistakes. Responsibilities are consistently incomplete, or not completed on time. They require consistent reminders. Their calendar is not up to date, and they frequently do not take lunch before the 5-hour mark even after follow up. The team member is not up to date with company, procedural, and product updates, and clarification is rarely asked for. 		<ul style="list-style-type: none"> The team member takes ownership of their responsibilities and mistakes. Responsibilities are generally completed in a timely manner. The team member occasionally needs reminders. The team member's calendar is generally updated and organized to ensure lunch is taken before the 5 hour mark with only minor lapses that do not occur again after follow up. Minor delays in staying up to date with company, procedural, and product updates. Clarification is asked for when needed, but opportunities to stay up to date (e.g., reviewing the Daily Rollup/Release Radar) are sometimes forgotten. 		<ul style="list-style-type: none"> The team member takes ownership of their responsibilities and mistakes. Responsibilities are completed in a timely manner. Their calendar is updated and organized appropriately to allow adequate time for all responsibilities, including taking lunch before the 5-hour mark. They are self-motivated, professional, and reliable. Company, procedural, and product updates (e.g., Daily Rollup/Release Radar) are understood and kept up with. Clarification is requested when needed. 	
Comments:						

6. Outlook and Growth Mindset	<ul style="list-style-type: none"> • The team member does not contribute to company goals or display a strong work ethic. • They often lose sight of what is best for the customer, and in turn the company. • The team member shows a lack of flexibility when faced with change. • They show little interest in supporting their team members when an extra hand is needed. 		<ul style="list-style-type: none"> • The team member generally contributes to company goals. • They can occasionally lose sight of what is best for the customer, and in turn the company. However, they are usually customer oriented. • The team member is usually positive, approachable, and maintains a supportive and productive environment, but may need the occasional reminder. 		<ul style="list-style-type: none"> • The team member contributes to company goals through a strong work ethic. • They are customer oriented and focused on providing customer value using good judgment. • They are positive, approachable, and maintain a supportive and productive environment. 	
Comments:						
7. Communication	<ul style="list-style-type: none"> • The team member shows large areas for opportunities to develop more direct, proactive, and open communication. • Scheduling needs and out-of-office needs are not communicated beforehand even after follow-up has occurred. • Workloads that exceed a team member's bandwidth are not communicated, and behavior doesn't change after feedback. 		<ul style="list-style-type: none"> • The team member has transparent, open, and proactive communication, but shows minor areas of opportunity to develop this to be more proficient. • Scheduling and out-of-office needs are communicated beforehand with a lead with only minor lapses, and doesn't occur again after follow-up. • Leads are updated directly about workloads that exceed the team member's bandwidth with only minor lapses that do not occur again after follow-up. 		<ul style="list-style-type: none"> • Transparent, open, and proactive communication is provided. • Communication is direct, but respectful. • Scheduling needs and out-of-office needs are communicated clearly beforehand with their Lead. • Leads are updated directly and proactively when workload or duties exceed their bandwidth. 	
Comments:						

Other collaborating educator comments:

Additional check-in notes:

Onboarding Calls

Evaluator/Educator:

Week:

Date:

Overview:

Category:	Score Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.	Call 1 Score	Call 2 Score
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	1	2	3	4	5		
1. Starting the call	<ul style="list-style-type: none"> The team member failed to turn on their video when on their onboarding call. The team member didn't encourage the customer to share their screen, or didn't offer to share their own screen. The team member failed to call the customer if they failed to join the scheduled call after 5 minutes. The team member didn't introduce themselves, or set proper expectations of the call. This includes a brief overview of what will be discussed and the time limitation. The team member does not remember to lock the meeting after a customer has arrived. 		<ul style="list-style-type: none"> The team member fails to consistently turn their video camera on when speaking to customers. The team member came somewhat unprepared to the call. The team member is inconsistent with calling tardy customers. The team member is inconsistent with locking the meeting once the customer has arrived. 		<ul style="list-style-type: none"> The customer was greeted immediately by the team member with their camera on. The team member was prepared for the call and set proper expectations with the customer. The team member consistently calls customers who are tardy to their onboarding calls. The team member always locks the meeting once the scheduled customer has arrived. 		
Comments Call 1:							
Comments Call 2:							
2. Timeliness	<ul style="list-style-type: none"> The team member consistently lets the onboarding call exceed the expected 30-minutes, and does not set clear expectations at the beginning of the call. The call started late due to the team member being tardy for their pre-scheduled onboarding call. 		<ul style="list-style-type: none"> The team member is not consistent with setting time expectations at the beginning of the call. The team member shows an opportunity with timeliness. 		<ul style="list-style-type: none"> Onboarding calls are completed within the allotted 30-minutes. The team member was early, or on time to the scheduled onboarding call. 		
Comments Call 1:							
Comments Call 2:							

3. Content & Product Knowledge	<ul style="list-style-type: none"> The team member provides accurate workflows and product information less than 60% of the time. HIPAA guidelines and/or Admin processes are not followed, and resources are not consistently provided. Frequent areas of opportunity to include more accurate product knowledge, complete workflows, or additional context. The team member fails to remind the customer about the follow-up customer survey for most calls. They team member consistently fails to remind the customer how to receive future support for most calls. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 60-90% of the time. HIPAA guidelines are adhered to, most Admin processes are followed, and resources are mentioned, but not consistently. There are specific areas of opportunity in their product knowledge such as more accurate information, more complete workflows, or the opportunity to provide additional context about an issue. The team member inconsistently reminds the customer about the follow-up customer survey. The team member inconsistently reminds the customer about how to receive future support. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 90% or more of the time. HIPAA guidelines are adhered to and Admin processes are followed. Their content and product knowledge is consistent, precise, and edited for the customer's workflow accurately. The team member always reminds the customer about the follow-up customer survey. The team member always reminds the customer about how to receive support. 		
Comments Call 1:							
Comments Call 2:							
4. Follow-up	<ul style="list-style-type: none"> There was no follow-up email to the customer. Follow-up emails sent have inaccurate or incomplete information or resources based on the customer's questions in the call. The team member did not complete the onboarding call follow-up survey for most of their calls. 		<ul style="list-style-type: none"> The team member occasionally forgets to send the follow-up email. The team member occasionally omits resources or information in the follow-up email that should have been provided based on the customer's questions in the call. The team member inconsistently completes the follow-up survey after every call. 		<ul style="list-style-type: none"> The team member always sends a follow-up email. The follow-up email contains all necessary resources and information based on the customer's questions in the call. The team member always completes the follow-up survey for every call. 		
Comments Call 2:							
Comments							

Call 2:	
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Other collaborating educator comments call 1:

Other collaborating educator comments call 2:

Insurance Tier 1

Evaluator/Educator:

Week:

Date:

Week 6 check-in notes:

Insurance Tier 1, cont.

Evaluator/Educator:

Week:

Date:

Writing & Verbal Skills

Category:	Score Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					Total Score
	1	2	3	4	5	40
1. Content & Product Knowledge	<ul style="list-style-type: none"> The team member provides accurate workflows and product information less than 60% of the time. HIPAA guidelines and/or Admin processes are not followed, and resources are not consistently provided within their replies. Frequent areas of opportunity to include more accurate content and product knowledge, complete workflows, or additional context. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 60-90% of the time. HIPAA guidelines are adhered to, most Admin processes are followed, and resources are included but not consistently. There are specific areas of opportunity in their content and product knowledge such as more accurate information, more complete workflows, or the opportunity to provide additional context about an issue. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 90% or more of the time. HIPAA guidelines are adhered to, Admin processes are followed, and resources are included. Their content and product knowledge is consistent, precise, and edited for the customer's workflow accurately. 	
Writing score (tickets, Chat)						
Verbal score (calls, classes)						
Comments:						
2. Communication Ability and Competence	<ul style="list-style-type: none"> Questions are not identified correctly, or answered directly in a reply. Opportunities to request clarifying information are missed. Information and workflow processes are difficult to navigate or follow, and/or are incorrect. 		<ul style="list-style-type: none"> Questions are identified and answered, but there are areas of opportunity to organize information as to answer more directly or immediately in a reply. Clarifying questions and requests for information are not asked consistently when appropriate, and resources are mostly tangential. Information and workflows display thoughtfulness, but clearly demonstrate areas needed for growth. 		<ul style="list-style-type: none"> The team member identifies the issue and answers questions in a correct, direct, and timely manner. Appropriate information is requested when necessary to answer, and the team member provides meaningful and related resources. Information and workflow processes are written in a manageable and easily navigated format. 	

Writing (tickets, Chat)					
Verbal (calls, classes)					
Comments:					
3. Vocabulary and Language	<ul style="list-style-type: none"> Multiple areas of opportunity to develop a more precise understanding of SimplePractice company- and product-related language (such as features, groups, and resources). Appropriate language and vocabulary are not used consistently, or are not consistent with current expectations, processes, or procedures. 		<ul style="list-style-type: none"> The team member shows an understanding of SimplePractice company- and product-related language (such as features, groups, and resources), but some inconsistencies are present. Appropriate language and vocabulary are used most of the time, but areas of opportunity to use more precise or appropriate language or vocabulary are present. 		<ul style="list-style-type: none"> SimplePractice company- and product-related language (such as features, groups, and resources) are reflected correctly in all customer correspondences (tickets, Chats, and calls). Additionally, language and vocabulary used is consistent with current expectations, processes, and procedures.
Writing (tickets, Chat)					
Verbal (calls, classes)					
Comments:					
4. Formatting	<ul style="list-style-type: none"> Formatting does not follow guidelines, including spacing, bolding, and the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists to craft clear replies. Resources and hyperlinks are not consistently bolded and embedded within text. Paragraph breaks are highly irregular or overly frequent, such that they bear no relation to the organization of the content of the reply. 		<ul style="list-style-type: none"> Formatting follows guidelines most of the time, but reflects areas of inconsistency in terms of spacing (paragraphs, sentences, etc.), bolding (navigational steps and action items), the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists, and how resources and hyperlinks are formatted. Content is clear and appropriately concise most of the time. 		<ul style="list-style-type: none"> Formatting guidelines such as spacing (paragraphs, sentences, etc.), bolding (navigational steps and action items), and the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists are consistently used correctly. Resources and hyperlinks are consistently bolded and embedded in text. Paragraph breaks reinforce the content organization so that information is clear and manageable.
Writing (tickets, Chat)					
Comments:					

5. Grammar	<ul style="list-style-type: none"> • Frequent grammatical lapses, incorrect language, and/or poor syntax interfere with the meaning of the replies. • Verb tense and subject-verb agreement are not constructed correctly. • Substantial need for editing. 		<ul style="list-style-type: none"> • Occasional grammatical lapses, incorrect language, and/or poor syntax. • Some opportunities for editing exist, but are not severe enough to impact the meaning of the reply. • Verb tense and subject-verb agreement are generally constructed correctly with minor inconsistencies. 		<ul style="list-style-type: none"> • Replies are constructed with correct and consistent grammar and language. • Syntax is crafted correctly, with no run-on sentences or sentence fragments, producing clear logical replies. <ul style="list-style-type: none"> ○ Verb tense and subject-verb agreement are constructed correctly with minor inconsistencies. 	
Writing (tickets, Chat)						
Comments:						
6. Punctuation	<ul style="list-style-type: none"> • Basic punctuation tends to be omitted, haphazard, or incorrect, often including both internal sentence punctuation and end-of-sentence punctuation. 		<ul style="list-style-type: none"> • Generally the end-of-sentence punctuation is correct, but internal punctuation (e.g., commas) may sometimes be incorrect. • Only minor instances where punctuation is forgotten or missed. 		<ul style="list-style-type: none"> • Effective and correct use of punctuation to separate sentences and their elements to clarify meaning. • Punctuation is not missed or forgotten. • Punctuation reflects tone (e.g., exclamation points are avoided unless use is initiated by the customer, and then only used with care while maintaining a professional tone). 	
Writing (tickets, Chat)						
Comments:						
7. Mechanics: Capitalization, Spelling, & Numerals	<ul style="list-style-type: none"> • Capitalization is inconsistent and appears random. • Numerous spelling errors or typos. • Readability and meaning of replies are significantly impaired, reflecting numerous opportunities for extensive editing. 		<ul style="list-style-type: none"> • Capitalization is generally consistent and accurate. • Errors, if any, are minor. • Spelling is usually correct, and there are few typos. • The meaning and readability of replies are not impaired due to mechanics. 		<ul style="list-style-type: none"> • Capitalization is correct and follows writing mechanical guidelines (e.g., the first word of a sentence and proper nouns are all capitalized). • Additionally, SimplePractice features, resources, and language within the product are all referenced with correct capitalization. • Spelling is consistently correct, and there are no typos. 	
Writing (tickets, Chat)						

Comments:	
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Week 8 check-in notes and rubric evaluations:

Other collaborating educator comments:

Professional Competencies

Overview:

Category:	Score					Total Score
	Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					
	1	2	3	4	5	35

1. Time Management: Customer replies	<ul style="list-style-type: none"> The team member consistently struggles to send out tickets requiring a reply within 24 hours. The team member often waits longer than 10-15 minutes to ask questions or investigate an issue to develop a reply showing extensive areas of opportunity for improvement in time-management. 		<ul style="list-style-type: none"> Tickets requiring a reply are almost always replied to within 24 hours. Inconsistencies in reply time are rare. The team member shows opportunity for improvement when asking questions or investigating within the 10-15 minute guideline, often taking longer to develop a reply. 		<ul style="list-style-type: none"> Tickets requiring a reply are followed-up within 24 hours. Questions are asked in an appropriate time frame (i.e., 15 minutes). The team member allocates their time appropriately when investigating and writing a ticket reply (i.e., 15 minutes within the first 6 weeks, and 10-15 minutes within the second 6 weeks). 	
Comments:						
2. Resource Utilization and Investigative Skills	<ul style="list-style-type: none"> The team member struggles to grasp adequate understanding of how to utilize company resources (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not utilized when necessary to gather context or ask questions. The team member doesn't display solution-oriented thinking, and often does not utilize resources to investigate or test an issue. 		<ul style="list-style-type: none"> The team member understands company resources, but fails at times to utilize them appropriately (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not consistently but often are utilized to ask questions and gather context when necessary. The team member displays some investigation or testing in their training account when asking questions, but on minor occasions doesn't utilize resources to investigate an issue. 		<ul style="list-style-type: none"> The team member understands and uses company resources to find answers (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are used when necessary to gather context and facilitate efficient question asking. Solution-oriented thinking is displayed. The team member can discuss what they've already investigated, tested in their training account, or the resources used when asking questions. 	
Comments:						
3. Receptiveness and Responsiveness to Feedback	<ul style="list-style-type: none"> The team member struggles to acknowledge and understand feedback, and rarely asks for clarification if needed. They are not self-motivated, and do not take actionable steps on strategies for improvement when necessary. They struggle to review their progress, and do not make noticeable improvements in response to feedback. 		<ul style="list-style-type: none"> The team member acknowledges and understands feedback, and asks for clarity most times. Self-motivated, and they take actionable steps on strategies for improvement when necessary. They irregularly review their progress, and make minor or slow improvements in response to feedback. 		<ul style="list-style-type: none"> The team member always acknowledges and understands feedback, and asks for clarity when necessary. They are self-motivated and take actionable steps on strategies for improvement. They regularly review their progress, and make noticeable and productive improvements in response to feedback. 	
Comments:						

<p>4. Initiative</p>	<ul style="list-style-type: none"> • The team member does not engage in requesting feedback. • There is little to no proactive feedback provided in relation to the group's goals, and is often not delivered to the person(s) who can make change. • The team member may mention ideas or points of improvement, but they fail to follow up in the proper forums. • When possible and appropriate, there is little initiative to respond to or assist peers. 		<ul style="list-style-type: none"> • The team member shows areas of opportunity to request feedback more proactively. • The team member occasionally provides meaningful feedback to the individual(s) who can make change, but there are opportunities to develop. • Initiative is inconsistent when they have ideas or see areas of improvement, and are only sometimes followed up with (e.g., Knowledge Requests, speaking with product squad members, or adding suggestions to the Training board). • When possible and appropriate, there is inconsistent initiative to respond to or assist peers. 		<ul style="list-style-type: none"> • The team member is engaged, proactive in asking questions, and appropriately requests feedback. • They are proactive in providing meaningful feedback related to the group's goals, and provide it to the individual(s) who can make change. • Initiative is taken when they have ideas or see areas of improvement to follow up in the proper forum (e.g., Knowledge Requests, speaking with Product Squad members, or adding suggestions to the Training board). • When possible and appropriate, they are responsive and helpful to peers when coverage is needed or questions are asked. They are engaged in education and group discussions. 	
<p>Comments:</p>						
<p>5. Accountability</p>	<ul style="list-style-type: none"> • The team member struggles to take ownership of job responsibilities, and doesn't take ownership of mistakes. • Responsibilities are consistently incomplete, or not completed on time. They require consistent reminders. • Their calendar is not up to date, and they frequently do not take lunch before the 5-hour mark even after follow up. • The team member is not up to date with company, procedural, and product updates, and clarification is rarely asked for. 		<ul style="list-style-type: none"> • The team member takes ownership of their responsibilities and mistakes. • Responsibilities are generally completed in a timely manner. The team member occasionally needs reminders. • The team member's calendar is generally updated and organized to ensure lunch is taken before the 5 hour mark with only minor lapses that do not occur again after follow up. • Minor delays in staying up to date with company, procedural, and product updates. Clarification is asked for when needed, but opportunities to stay up to date (e.g., reviewing the Daily Rollup/Release Radar) are sometimes forgotten. 		<ul style="list-style-type: none"> • The team member takes ownership of their responsibilities and mistakes. • Responsibilities are completed in a timely manner. • Their calendar is updated and organized appropriately to allow adequate time for all responsibilities, including taking lunch before the 5-hour mark. • They are self-motivated, professional, and reliable. • Company, procedural, and product updates (e.g., Daily Rollup/Release Radar) are understood and kept up with. Clarification is requested when needed. 	
<p>Comments:</p>						

6. Outlook and Growth Mindset	<ul style="list-style-type: none"> • The team member does not contribute to company goals or display a strong work ethic. • They often lose sight of what is best for the customer, and in turn the company. • The team member shows a lack of flexibility when faced with change. • They show little interest in supporting their team members when an extra hand is needed. 		<ul style="list-style-type: none"> • The team member generally contributes to company goals. • They can occasionally lose sight of what is best for the customer, and in turn the company. However, they are usually customer oriented. • The team member is usually positive, approachable, and maintains a supportive and productive environment, but may need the occasional reminder. 		<ul style="list-style-type: none"> • The team member contributes to company goals through a strong work ethic. • They are customer oriented and focused on providing customer value using good judgment. • They are positive, approachable, and maintain a supportive and productive environment. 	
Comments:						
7. Communication	<ul style="list-style-type: none"> • The team member shows large areas for opportunities to develop more direct, proactive, and open communication. • Scheduling needs and out-of-office needs are not communicated beforehand even after follow-up has occurred. • Workloads that exceed a team member's bandwidth are not communicated, and behavior doesn't change after feedback. 		<ul style="list-style-type: none"> • The team member has transparent, open, and proactive communication, but shows minor areas of opportunity to develop this to be more proficient. • Scheduling and out-of-office needs are communicated beforehand with a lead with only minor lapses, and doesn't occur again after follow-up. • Leads are updated directly about workloads that exceed the team member's bandwidth with only minor lapses that do not occur again after follow-up. 		<ul style="list-style-type: none"> • Transparent, open, and proactive communication is provided. • Communication is direct, but respectful. • Scheduling needs and out-of-office needs are communicated clearly beforehand with their Lead. • Leads are updated directly and proactively when workload or duties exceed their bandwidth. 	
Comments:						

Other collaborating educator comments:

Additional check-in notes:

Chat

Evaluator/Educator:

Week:

Date:

Overview:

Category:	Score Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					Chat #1	Chat #2
	1	2	3	4	5		
1. Timeliness	<ul style="list-style-type: none"> The team member is consistently late going "online" to chat shifts. The team member consistently takes longer than 5 minute to reply or provide an update to customers. The team member does not identify and answer questions in a direct or timely manner, and never meets the 14 minute average chat length guideline always going over by 15 or more minutes. The team member has an insufficient knowledge of available shortcuts and macros, and does not use them effectively or efficiently showing a large opportunity for growth. 		<ul style="list-style-type: none"> The team member is occasionally late going "online" to a chat shift. A reply or update is provided to a customer within the guidelines, with only minor lapses. The team member identifies the issue, and answers in a direct and timely manner most times, but occasionally doesn't meet the 14 minute average chat length guideline. They occasionally go over this guideline by 5-10 minutes or more. The team member has a sufficient knowledge of available shortcuts and macros, but shows opportunity to become more effective and efficient with their use. 		<ul style="list-style-type: none"> The team member is always on-time and "online" at the start of their chat shift. A reply or update to the customer is provided within the 0-4 minute guideline. The team member identifies the issue, and answers questions in a direct and timely manner, consistently meeting the 14 minute average chat length goal. The team member is highly knowledgeable of the available shortcuts and macros, and uses them effectively and efficiently. 		
Chat #1 Comments:							
Chat #2							

Comments:							
2. Content & Product Knowledge	<ul style="list-style-type: none"> The team member provides accurate workflows and product information less than 60% of the time. HIPAA guidelines and/or Admin processes are not followed, and resources are not consistently provided. Frequent areas of opportunity to include more accurate product knowledge, complete workflows, or additional context. The team member does not understand when to create tickets from a cht. When a ticket is made from a chat, the team member collects no information or incorrect information for the follow-up investigation. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 60-90% of the time. HIPAA guidelines are adhered to, most Admin processes are followed, and resources are mentioned, but not consistently. There are specific areas of opportunity in their product knowledge such as more accurate information, more complete workflows, or the opportunity to provide additional context about an issue. The team member shows an opportunity to better understand when to create a ticket from a chat, and occasionally misses appropriate opportunities to do so. When creating a ticket from chat, the team member misses collecting minor details for the follow-up investigation. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 90% or more of the time. HIPAA guidelines are adhered to and Admin processes are followed. Their content and product knowledge is consistent, precise, and edited for the customer's workflow accurately. The team member understands when to create a ticket from a chat, and does so when appropriate consistently. When creating a ticket from chat, the team member always collects all necessary information for the follow-up investigation. 		
Chat #1 Comments:							
Chat #2 Comments:							
3. Handling PHI	<ul style="list-style-type: none"> The team member frequently forgets to use the Chat > Intro shortcut or free write to avoid sharing PHI at the start of a chat. If PHI is shared, the team member does not send the Chat > PHI shortcut to alert the customer of the PHI and our follow-up steps. The team member does not follow-up with appropriate redaction steps when PHI is shared. 		<ul style="list-style-type: none"> The team member uses the Chat > Intro shortcut or free writes to avoid sharing PHI at the start of most chats, but occasionally forgets and leaves it out. If PHI is shared, the team member sends the Chat > PHI shortcut to alert the customer of the PHI and our follow-up steps most times only rarely forgetting. 		<ul style="list-style-type: none"> The team member always uses the Chat > intro shortcut, or free writes, to alert customers to avoid sharing PHI at the start of a chat. If PHI is shared, the team member always sends Chat > PHI shortcut to alert the customer of the PHI and our follow-up steps. 		

			<ul style="list-style-type: none"> The team member follows-up with appropriate redaction steps when PHI is shared, and when an error is made it's minor. 		<ul style="list-style-type: none"> The team member always follows-up with the appropriate redaction steps when PHI is shared. 		
Chat #1 Comments:							
Chat #2 Comments:							
4. Chat Wrap-up	<ul style="list-style-type: none"> Tickets that do not require follow-up from chat are consistently forgotten and not closed appropriately. Tickets that require being split for a follow-up investigation are not created consistently, and when they are correct steps are not taken. The team member frequently forgets to go "invisible" at all after their chat shift or are very late in doing so. 		<ul style="list-style-type: none"> Tickets that do not require follow-up from a chat are closed appropriately afterwards most of the time, only rarely forgetting. Tickets that require being split for a follow-up investigation are created most times with only minor errors. The team member shows some opportunity to become more consistent promptly going "invisible" after their chat shift. 		<ul style="list-style-type: none"> Tickets from chat that do not require follow-up are always closed appropriately afterwards. The team member always splits a ticket that requires a follow-up investigation while taking the correct steps to split the ticket. The team member always remembers to go "invisible" promptly after their chat shift. 		
Chat #1 Comments:							
Chat #2 Comments:							
5. Grammar	<ul style="list-style-type: none"> Frequent grammatical lapses, incorrect language, and/or poor syntax interfere with the meaning of the replies. Substantial need for editing. 		<ul style="list-style-type: none"> Occasional grammatical lapses, incorrect language, and/or poor syntax. Some opportunities for editing exist, but are not severe enough to impact the meaning of the reply. 		<ul style="list-style-type: none"> Replies are constructed with correct and consistent grammar and language. Syntax is crafted correctly, with no run-on sentences or sentence fragments, producing clear logical replies. 		
Chat #1 Comments:							

Chat #2 Comments:						
6. Punctuation	<ul style="list-style-type: none"> Basic punctuation tends to be omitted, haphazard, or incorrect, often including both internal sentence punctuation and end-of-sentence punctuation. 		<ul style="list-style-type: none"> Generally the end-of-sentence punctuation is correct, but internal punctuation (e.g., commas) may sometimes be incorrect. Only minor instances where punctuation is forgotten or missed. 		<ul style="list-style-type: none"> Effective and correct use of punctuation to separate sentences and their elements to clarify meaning. Punctuation is not missed or forgotten. Punctuation reflects tone (e.g., exclamation points are avoided unless use is initiated by the customer, and then only used with care while maintaining a professional tone). 	
Chat #1 Comments:						
Chat #2 Comments:						
7. Writing Mechanics: Capitalization , Spelling, and Numerals	<ul style="list-style-type: none"> Capitalization is inconsistent and appears random. Numerous spelling errors or typos. Readability and meaning of replies are significantly impaired, reflecting numerous opportunities for extensive editing. 		<ul style="list-style-type: none"> Capitalization is generally consistent and accurate. Errors, if any, are minor. Spelling is usually correct, and there are few typos. The meaning and readability of replies are not impaired due to mechanics. 		<ul style="list-style-type: none"> Capitalization is correct and follows writing mechanical guidelines (e.g., the first word of a sentence and proper nouns are all capitalized). Additionally, SimplePractice features, resources, and language within the product are all referenced with correct capitalization. Spelling is consistently correct, and there are no typos. 	
Chat #1 Comments:						
Chat #2 Comments:						

Chat #1: Other collaborating educator comments:

Chat #2: Other collaborating educator comments:

Product Tier 2

Evaluator/Educator:

Week:

Date:

Week 10 check-in notes:

Product Tier 2, cont.

Evaluator/Educator:

Week:

Date:

Writing & Verbal Skills

Overview:

Category:	Score Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					Total Score
	1	2	3	4	5	40
1.Content & Product Knowledge	<ul style="list-style-type: none"> The team member provides accurate workflows and product information less than 60% of the time. HIPAA guidelines and/or Admin processes are not followed, and resources are not consistently provided within their replies. Frequent areas of opportunity to include more accurate content and product knowledge, complete workflows, or additional context. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 60-90% of the time. HIPAA guidelines are adhered to, most Admin processes are followed, and resources are included but not consistently. There are specific areas of opportunity in their content and product knowledge such as more accurate information, more complete workflows, or the opportunity to provide additional context about an issue. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 90% or more of the time. HIPAA guidelines are adhered to, Admin processes are followed, and resources are included. Their content and product knowledge is consistent, precise, and edited for the customer's workflow accurately. 	
Writing score (tickets, Chat)						
Verbal score (calls, classes)						
Comments:						

2. Communication Ability and Competence	<ul style="list-style-type: none"> • Questions are not identified correctly, or answered directly in a reply. • Opportunities to request clarifying information are missed. • Information and workflow processes are difficult to navigate or follow, and/or are incorrect. 		<ul style="list-style-type: none"> • Questions are identified and answered, but there are areas of opportunity to organize information as to answer more directly or immediately in a reply. • Clarifying questions and requests for information are not asked consistently when appropriate, and resources are mostly meaningfully related, but sometimes are tangential. • Information and workflows display thoughtfulness, but clearly demonstrate areas needed for growth. 		<ul style="list-style-type: none"> • The team member identifies the issue and answers questions in a correct, direct, and timely manner. • Appropriate information is requested when necessary to answer, and the team member provides meaningful and related resources. • Information and workflow processes are written in a manageable and easily navigated format. 	
Writing (tickets, Chat)						
Verbal (calls, classes)						
Comments:						
3. Vocabulary and Language	<ul style="list-style-type: none"> • Multiple areas of opportunity to develop a more precise understanding of SimplePractice company- and product-related language (such as features, groups, and resources). • Appropriate language and vocabulary are not used consistently, or are not consistent with current expectations, processes, or procedures. 		<ul style="list-style-type: none"> • The team member shows an understanding of SimplePractice company- and product-related language (such as features, groups, and resources), but some inconsistencies are present. • Appropriate language and vocabulary are used most of the time, but areas of opportunity to use more precise or appropriate language or vocabulary are present. 		<ul style="list-style-type: none"> • SimplePractice company- and product-related language (such as features, groups, and resources) are reflected correctly in all customer correspondences (tickets, Chats, and calls). • Additionally, language and vocabulary used is consistent with current expectations, processes, and procedures. 	
Writing (tickets, Chat)						
Verbal (calls, classes)						
Comments:						
4. Formatting	<ul style="list-style-type: none"> • Formatting does not follow guidelines, including spacing, bolding, and the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists to craft clear replies. 		<ul style="list-style-type: none"> • Formatting follows guidelines most of the time, but reflects areas of inconsistency in terms of spacing (paragraphs, sentences, etc.), bolding (navigational steps and action 		<ul style="list-style-type: none"> • Formatting guidelines such as spacing (paragraphs, sentences, etc.), bolding (navigational steps and action items), and the use of ordered (i.e., numbered) or 	

	<ul style="list-style-type: none"> Resources and hyperlinks are not consistently bolded and embedded within text. Paragraph breaks are highly irregular or overly frequent, such that they bear no relation to the organization of the content of the reply. 		<ul style="list-style-type: none"> items), the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists, and how resources and hyperlinks are formatted. Content is clear and appropriately concise most of the time. 		<ul style="list-style-type: none"> unordered (e.g., bulleted) lists are consistently used correctly. Resources and hyperlinks are consistently bolded and embedded in text. Paragraph breaks reinforce the content organization so that information is clear and manageable. 	
Writing (tickets, Chat)						
Comments:						
5. Grammar	<ul style="list-style-type: none"> Frequent grammatical lapses, incorrect language, and/or poor syntax interfere with the meaning of the replies. Verb tense and subject-verb agreement are not constructed correctly. Substantial need for editing. 		<ul style="list-style-type: none"> Occasional grammatical lapses, incorrect language, and/or poor syntax. Some opportunities for editing exist, but are not severe enough to impact the meaning of the reply. Verb tense and subject-verb agreement are generally constructed correctly with minor inconsistencies. 		<ul style="list-style-type: none"> Replies are constructed with correct and consistent grammar and language. Syntax is crafted correctly, with no run-on sentences or sentence fragments, producing clear logical replies. <ul style="list-style-type: none"> Verb tense and subject-verb agreement are constructed correctly with minor inconsistencies. 	
Writing (tickets, Chat)						
Comments:						
6. Punctuation	<ul style="list-style-type: none"> Basic punctuation tends to be omitted, haphazard, or incorrect, often including both internal sentence punctuation and end-of-sentence punctuation. 		<ul style="list-style-type: none"> Generally the end-of-sentence punctuation is correct, but internal punctuation (e.g., commas) may sometimes be incorrect. Only minor instances where punctuation is forgotten or missed. 		<ul style="list-style-type: none"> Effective and correct use of punctuation to separate sentences and their elements to clarify meaning. Punctuation is not missed or forgotten. Punctuation reflects tone (e.g., exclamation points are avoided unless use is initiated by the customer, and then only used with care while maintaining a professional tone). 	
Writing (tickets, Chat)						
Comments:						

7. Mechanics: Capitalization, Spelling, & Numerals	<ul style="list-style-type: none"> Capitalization is inconsistent and appears random. Numerous spelling errors or typos. Readability and meaning of replies are significantly impaired, reflecting numerous opportunities for extensive editing. 		<ul style="list-style-type: none"> Capitalization is generally consistent and accurate. Errors, if any, are minor. Spelling is usually correct, and there are few typos. The meaning and readability of replies are not impaired due to mechanics. 		<ul style="list-style-type: none"> Capitalization is correct and follows writing mechanical guidelines (e.g., the first word of a sentence and proper nouns are all capitalized). Additionally, SimplePractice features, resources, and language within the product are all referenced with correct capitalization. Spelling is consistently correct, and there are no typos. 	
Writing (tickets, Chat)						
Comments:						

Week 12 check-in notes and rubric evaluations:

Other collaborating educator comments:

Professional Competencies

Overview:

Category:	Score Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					Total Score
	1	2	3	4	5	35
1. Time Management: Customer replies	<ul style="list-style-type: none"> The team member consistently struggles to send out tickets requiring a reply within 24 hours. The team member often waits longer than 10-15 minutes to ask questions or investigate an issue to develop a reply showing extensive areas of opportunity for improvement in time-management. 		<ul style="list-style-type: none"> Tickets requiring a reply are almost always replied to within 24 hours. Inconsistencies in reply time are rare. The team member shows opportunity for improvement when asking questions or investigating within the 10-15 minute guideline, often taking longer to develop a reply. 		<ul style="list-style-type: none"> Tickets requiring a reply are followed-up within 24 hours. Questions are asked in an appropriate time frame (i.e., 15 minutes). The team member allocates their time appropriately when investigating and writing a ticket reply (i.e., 15 minutes within the first 6 weeks, and 10-15 minutes within the second 6 weeks). 	
Comments:						
2. Resource Utilization and Investigative Skills	<ul style="list-style-type: none"> The team member struggles to grasp adequate understanding of how to utilize company resources (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not utilized when necessary to gather context or ask questions. The team member doesn't display solution-oriented thinking, and often does not utilize resources to investigate or test an issue. 		<ul style="list-style-type: none"> The team member understands company resources, but fails at times to utilize them appropriately (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not consistently but often are utilized to ask questions and gather context when necessary. The team member displays some investigation or testing in their training account when asking questions, but on minor occasions doesn't utilize resources to investigate an issue. 		<ul style="list-style-type: none"> The team member understands and uses company resources to find answers (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are used when necessary to gather context and facilitate efficient question asking. Solution-oriented thinking is displayed. The team member can discuss what they've already investigated, tested in their training account, or the resources used when asking questions. 	
Comments:						

3. Receptiveness and Responsiveness to Feedback	<ul style="list-style-type: none"> • The team member struggles to acknowledge and understand feedback, and rarely asks for clarification if needed. • They are not self-motivated, and do take actionable steps on strategies for improvement when necessary. • They struggle to review their progress, and do not make noticeable improvements in response to feedback. 		<ul style="list-style-type: none"> • The team member acknowledges and understands feedback, and asks for clarity most times. • Self-motivated, and they take actionable steps on strategies for improvement when necessary. • They irregularly review their progress, and make minor or slow improvements in response to feedback. 		<ul style="list-style-type: none"> • The team member always acknowledges and understands feedback, and asks for clarity when necessary. • They are self-motivated and take actionable steps on strategies for improvement. • They regularly review their progress, and make noticeable and productive improvements in response to feedback. 	
Comments:						
4. Initiative	<ul style="list-style-type: none"> • The team member does not engage in requesting feedback. • There is little to no proactive feedback provided in relation to the group's goals, and is often not delivered to the person(s) who can make change. • The team member may mention ideas or points of improvement, but they fail to follow up in the proper forums. • When possible and appropriate, there is little initiative to respond to or assist peers. 		<ul style="list-style-type: none"> • The team member shows areas of opportunity to request feedback more proactively. • The team member occasionally provides meaningful feedback to the individual(s) who can make change, but there are opportunities to develop. • Initiative is inconsistent when they have ideas or see areas of improvement, and are only sometimes followed up with (e.g., Knowledge Requests, speaking with product squad members, or adding suggestions to the Training board). • When possible and appropriate, there is inconsistent initiative to respond to or assist peers. 		<ul style="list-style-type: none"> • The team member is engaged, proactive in asking questions, and appropriately requests feedback. • They are proactive in providing meaningful feedback related to the group's goals, and provide it to the individual(s) who can make change. • Initiative is taken when they have ideas or see areas of improvement to follow up in the proper forum (e.g., Knowledge Requests, speaking with Product Squad members, or adding suggestions to the Training board). • When possible and appropriate, they are responsive and helpful to peers when coverage is needed or questions are asked. They are engaged in education and group discussions. 	
Comments:						
5. Accountability	<ul style="list-style-type: none"> • The team member struggles to take ownership of job responsibilities, and doesn't take ownership of mistakes. • Responsibilities are consistently incomplete, or not completed on time. They require consistent 		<ul style="list-style-type: none"> • The team member takes ownership of their responsibilities and mistakes. • Responsibilities are generally completed in a timely manner. The team member occasionally needs reminders. 		<ul style="list-style-type: none"> • The team member takes ownership of their responsibilities and mistakes. • Responsibilities are completed in a timely manner. • Their calendar is updated and 	

	<ul style="list-style-type: none"> reminders. Their calendar is not up to date, and they frequently do not take lunch before the 5-hour mark even after follow up. The team member is not up to date with company, procedural, and product updates, and clarification is rarely asked for. 		<ul style="list-style-type: none"> The team member's calendar is generally updated and organized to ensure lunch is taken before the 5 hour mark with only minor lapses that do not occur again after follow up. Minor delays in staying up to date with company, procedural, and product updates. Clarification is asked for when needed, but opportunities to stay up to date (e.g., reviewing the Daily Rollup/Release Radar) are sometimes forgotten. 		<ul style="list-style-type: none"> organized appropriately to allow adequate time for all responsibilities, including taking lunch before the 5-hour mark. They are self-motivated, professional, and reliable. Company, procedural, and product updates (e.g., Daily Rollup/Release Radar) are understood and kept up with. Clarification is requested when needed. 	
Comments:						
6. Outlook and Growth Mindset	<ul style="list-style-type: none"> The team member does not contribute to company goals or display a strong work ethic. They often lose sight of what is best for the customer, and in turn the company. The team member shows a lack of flexibility when faced with change. They show little interest in supporting their team members when an extra hand is needed. 		<ul style="list-style-type: none"> The team member generally contributes to company goals. They can occasionally lose sight of what is best for the customer, and in turn the company. However, they are usually customer oriented. The team member is usually positive, approachable, and maintains a supportive and productive environment, but may need the occasional reminder. 		<ul style="list-style-type: none"> The team member contributes to company goals through a strong work ethic. They are customer oriented and focused on providing customer value using good judgment. They are positive, approachable, and maintain a supportive and productive environment. 	
Comments:						
7. Communication	<ul style="list-style-type: none"> The team member shows large areas for opportunities to develop more direct, proactive, and open communication. Scheduling needs and out-of-office needs are not communicated beforehand even after follow-up has occurred. Workloads that exceed a team member's bandwidth are not communicated, and behavior doesn't change after feedback. 		<ul style="list-style-type: none"> The team member has transparent, open, and proactive communication, but shows minor areas of opportunity to develop this to be more proficient. Scheduling and out-of-office needs are communicated beforehand with a lead with only minor lapses, and doesn't occur again after follow-up. Leads are updated directly about workloads that exceed the team member's bandwidth with only minor lapses that do not occur again after follow-up. 		<ul style="list-style-type: none"> Transparent, open, and proactive communication is provided. Communication is direct, but respectful. Scheduling needs and out-of-office needs are communicated clearly beforehand with their Lead. Leads are updated directly and proactively when workload or duties exceed their bandwidth. 	

Comments:	
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Other collaborating educator comments:

Additional check-in notes:

Insurance Tier 2

Evaluator/Educator:

Week:

Date:

Week 14 check-in notes and rubric evaluations:

Insurance Tier 2, cont.

Evaluator/Educator:

Week:

Date:

Writing & Verbal Skills

Overview:

Category:	Score					Total Score
	Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					
	1	2	3	4	5	40
1.Content & Product Knowledge	<ul style="list-style-type: none"> The team member provides accurate workflows and product information less than 60% of the time. HIPAA guidelines and/or Admin processes are not followed, and resources are not consistently provided within their replies. Frequent areas of opportunity to include more accurate content and product knowledge, complete workflows, or additional context. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 60-90% of the time. HIPAA guidelines are adhered to, most Admin processes are followed, and resources are included but not consistently. There are specific areas of opportunity in their content and product knowledge such as more accurate information, more complete workflows, or the opportunity to provide additional context about an issue. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 90% or more of the time. HIPAA guidelines are adhered to, Admin processes are followed, and resources are included. Their content and product knowledge is consistent, precise, and edited for the customer's workflow accurately. 	
Writing score (tickets, Chat)						
Verbal score (calls, classes)						
Comments:						

2. Communication Ability and Competence	<ul style="list-style-type: none"> • Questions are not identified correctly, or answered directly in a reply. • Opportunities to request clarifying information are missed. • Information and workflow processes are difficult to navigate or follow, and/or are incorrect. 		<ul style="list-style-type: none"> • Questions are identified and answered, but there are areas of opportunity to organize information as to answer more directly or immediately in a reply. • Clarifying questions and requests for information are not asked consistently when appropriate, and resources are mostly meaningfully related, but sometimes are tangential. • Information and workflows display thoughtfulness, but clearly demonstrate areas needed for growth. 		<ul style="list-style-type: none"> • The team member identifies the issue and answers questions in a correct, direct, and timely manner. • Appropriate information is requested when necessary to answer, and the team member provides meaningful and related resources. • Information and workflow processes are written in a manageable and easily navigated format. 	
Writing (tickets, Chat)						
Verbal (calls, classes)						
Comments:						
3. Vocabulary and Language	<ul style="list-style-type: none"> • Multiple areas of opportunity to develop a more precise understanding of SimplePractice company- and product-related language (such as features, groups, and resources). • Appropriate language and vocabulary are not used consistently, or are not consistent with current expectations, processes, or procedures. 		<ul style="list-style-type: none"> • The team member shows an understanding of SimplePractice company- and product-related language (such as features, groups, and resources), but some inconsistencies are present. • Appropriate language and vocabulary are used most of the time, but areas of opportunity to use more precise or appropriate language or vocabulary are present. 		<ul style="list-style-type: none"> • SimplePractice company- and product-related language (such as features, groups, and resources) are reflected correctly in all customer correspondences (tickets, Chats, and calls). • Additionally, language and vocabulary used is consistent with current expectations, processes, and procedures. 	
Writing (tickets, Chat)						
Verbal (calls, classes)						
Comments:						
4. Formatting	<ul style="list-style-type: none"> • Formatting does not follow guidelines, including spacing, bolding, and the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists to craft clear replies. 		<ul style="list-style-type: none"> • Formatting follows guidelines most of the time, but reflects areas of inconsistency in terms of spacing (paragraphs, sentences, etc.), bolding (navigational steps and action 		<ul style="list-style-type: none"> • Formatting guidelines such as spacing (paragraphs, sentences, etc.), bolding (navigational steps and action items), and the use of ordered (i.e., numbered) or 	

	<ul style="list-style-type: none"> Resources and hyperlinks are not consistently bolded and embedded within text. Paragraph breaks are highly irregular or overly frequent, such that they bear no relation to the organization of the content of the reply. 		<ul style="list-style-type: none"> items), the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists, and how resources and hyperlinks are formatted. Content is clear and appropriately concise most of the time. 		<ul style="list-style-type: none"> unordered (e.g., bulleted) lists are consistently used correctly. Resources and hyperlinks are consistently bolded and embedded in text. Paragraph breaks reinforce the content organization so that information is clear and manageable. 	
Writing (tickets, Chat)						
Comments:						
5. Grammar	<ul style="list-style-type: none"> Frequent grammatical lapses, incorrect language, and/or poor syntax interfere with the meaning of the replies. Verb tense and subject-verb agreement are not constructed correctly. Substantial need for editing. 		<ul style="list-style-type: none"> Occasional grammatical lapses, incorrect language, and/or poor syntax. Some opportunities for editing exist, but are not severe enough to impact the meaning of the reply. Verb tense and subject-verb agreement are generally constructed correctly with minor inconsistencies. 		<ul style="list-style-type: none"> Replies are constructed with correct and consistent grammar and language. Syntax is crafted correctly, with no run-on sentences or sentence fragments, producing clear logical replies. <ul style="list-style-type: none"> Verb tense and subject-verb agreement are constructed correctly with minor inconsistencies. 	
Writing (tickets, Chat)						
Comments:						
6. Punctuation	<ul style="list-style-type: none"> Basic punctuation tends to be omitted, haphazard, or incorrect, often including both internal sentence punctuation and end-of-sentence punctuation. 		<ul style="list-style-type: none"> Generally the end-of-sentence punctuation is correct, but internal punctuation (e.g., commas) may sometimes be incorrect. Only minor instances where punctuation is forgotten or missed. 		<ul style="list-style-type: none"> Effective and correct use of punctuation to separate sentences and their elements to clarify meaning. Punctuation is not missed or forgotten. Punctuation reflects tone (e.g., exclamation points are avoided unless use is initiated by the customer, and then only used with care while maintaining a professional tone). 	
Writing (tickets, Chat)						
Comments:						

7. Mechanics: Capitalization, Spelling, & Numerals	<ul style="list-style-type: none"> Capitalization is inconsistent and appears random. Numerous spelling errors or typos. Readability and meaning of replies are significantly impaired, reflecting numerous opportunities for extensive editing. 		<ul style="list-style-type: none"> Capitalization is generally consistent and accurate. Errors, if any, are minor. Spelling is usually correct, and there are few typos. The meaning and readability of replies are not impaired due to mechanics. 		<ul style="list-style-type: none"> Capitalization is correct and follows writing mechanical guidelines (e.g., the first word of a sentence and proper nouns are all capitalized). Additionally, SimplePractice features, resources, and language within the product are all referenced with correct capitalization. Spelling is consistently correct, and there are no typos. 	
Writing (tickets, Chat)						
Comments:						

Other collaborating educator comments:

Professional Competencies

Overview:

Category:	Score Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					Total Score
	1	2	3	4	5	35
1. Time Management: Customer replies	<ul style="list-style-type: none"> The team member consistently struggles to send out tickets requiring a reply within 24 hours. The team member often waits longer than 10-15 minutes to ask questions or investigate an issue to develop a reply showing extensive areas of opportunity for improvement in time-management. 		<ul style="list-style-type: none"> Tickets requiring a reply are almost always replied to within 24 hours. Inconsistencies in reply time are rare. The team member shows opportunity for improvement when asking questions or investigating within the 10-15 minute guideline, often taking longer to develop a reply. 		<ul style="list-style-type: none"> Tickets requiring a reply are followed-up within 24 hours. Questions are asked in an appropriate time frame (i.e., 15 minutes). The team member allocates their time appropriately when investigating and writing a ticket reply (i.e., 15 minutes within the first 6 weeks, and 10-15 minutes within the second 6 weeks). 	
Comments:						
2. Resource Utilization and Investigative Skills	<ul style="list-style-type: none"> The team member struggles to grasp adequate understanding of how to utilize company resources (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not utilized when necessary to gather context or ask questions. The team member doesn't display solution-oriented thinking, and often does not utilize resources to investigate or test an issue. 		<ul style="list-style-type: none"> The team member understands company resources, but fails at times to utilize them appropriately (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not consistently but often are utilized to ask questions and gather context when necessary. The team member displays some investigation or testing in their training account when asking questions, but on minor occasions doesn't utilize resources to investigate an issue. 		<ul style="list-style-type: none"> The team member understands and uses company resources to find answers (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are used when necessary to gather context and facilitate efficient question asking. Solution-oriented thinking is displayed. The team member can discuss what they've already investigated, tested in their training account, or the resources used when asking questions. 	
Comments:						

3. Receptiveness and Responsiveness to Feedback	<ul style="list-style-type: none"> The team member struggles to acknowledge and understand feedback, and rarely asks for clarification if needed. They are not self-motivated, and do not take actionable steps on strategies for improvement when necessary. They struggle to review their progress, and do not make noticeable improvements in response to feedback. 		<ul style="list-style-type: none"> The team member acknowledges and understands feedback, and asks for clarity most times. Self-motivated, and they take actionable steps on strategies for improvement when necessary. They irregularly review their progress, and make minor or slow improvements in response to feedback. 		<ul style="list-style-type: none"> The team member always acknowledges and understands feedback, and asks for clarity when necessary. They are self-motivated and take actionable steps on strategies for improvement. They regularly review their progress, and make noticeable and productive improvements in response to feedback. 	
Comments:						
4. Initiative	<ul style="list-style-type: none"> The team member does not engage in requesting feedback. There is little to no proactive feedback provided in relation to the group's goals, and is often not delivered to the person(s) who can make change. The team member may mention ideas or points of improvement, but they fail to follow up in the proper forums. When possible and appropriate, there is little initiative to respond to or assist peers. 		<ul style="list-style-type: none"> The team member shows areas of opportunity to request feedback more proactively. The team member occasionally provides meaningful feedback to the individual(s) who can make change, but there are opportunities to develop. Initiative is inconsistent when they have ideas or see areas of improvement, and are only sometimes followed up with (e.g., Knowledge Requests, speaking with product squad members, or adding suggestions to the Training board). When possible and appropriate, there is inconsistent initiative to respond to or assist peers. 		<ul style="list-style-type: none"> The team member is engaged, proactive in asking questions, and appropriately requests feedback. They are proactive in providing meaningful feedback related to the group's goals, and provide it to the individual(s) who can make change. Initiative is taken when they have ideas or see areas of improvement to follow up in the proper forum (e.g., Knowledge Requests, speaking with Product Squad members, or adding suggestions to the Training board). When possible and appropriate, they are responsive and helpful to peers when coverage is needed or questions are asked. They are engaged in education and group discussions. 	
Comments:						
5. Accountability	<ul style="list-style-type: none"> The team member struggles to take ownership of job responsibilities, and doesn't take ownership of mistakes. Responsibilities are consistently incomplete, or not completed on time. They require consistent 		<ul style="list-style-type: none"> The team member takes ownership of their responsibilities and mistakes. Responsibilities are generally completed in a timely manner. The team member occasionally needs reminders. 		<ul style="list-style-type: none"> The team member takes ownership of their responsibilities and mistakes. Responsibilities are completed in a timely manner. Their calendar is updated and 	

	<ul style="list-style-type: none"> reminders. Their calendar is not up to date, and they frequently do not take lunch before the 5-hour mark even after follow up. The team member is not up to date with company, procedural, and product updates, and clarification is rarely asked for. 		<ul style="list-style-type: none"> The team member's calendar is generally updated and organized to ensure lunch is taken before the 5 hour mark with only minor lapses that do not occur again after follow up. Minor delays in staying up to date with company, procedural, and product updates. Clarification is asked for when needed, but opportunities to stay up to date (e.g., reviewing the Daily Rollup/Release Radar) are sometimes forgotten. 		<ul style="list-style-type: none"> organized appropriately to allow adequate time for all responsibilities, including taking lunch before the 5-hour mark. They are self-motivated, professional, and reliable. Company, procedural, and product updates (e.g., Daily Rollup/Release Radar) are understood and kept up with. Clarification is requested when needed. 	
Comments:						
6. Outlook and Growth Mindset	<ul style="list-style-type: none"> The team member does not contribute to company goals or display a strong work ethic. They often lose sight of what is best for the customer, and in turn the company. The team member shows a lack of flexibility when faced with change. They show little interest in supporting their team members when an extra hand is needed. 		<ul style="list-style-type: none"> The team member generally contributes to company goals. They can occasionally lose sight of what is best for the customer, and in turn the company. However, they are usually customer oriented. The team member is usually positive, approachable, and maintains a supportive and productive environment, but may need the occasional reminder. 		<ul style="list-style-type: none"> The team member contributes to company goals through a strong work ethic. They are customer oriented and focused on providing customer value using good judgment. They are positive, approachable, and maintain a supportive and productive environment. 	
Comments:						
7. Communication	<ul style="list-style-type: none"> The team member shows large areas for opportunities to develop more direct, proactive, and open communication. Scheduling needs and out-of-office needs are not communicated beforehand even after follow-up has occurred. Workloads that exceed a team member's bandwidth are not communicated, and behavior doesn't change after feedback. 		<ul style="list-style-type: none"> The team member has transparent, open, and proactive communication, but shows minor areas of opportunity to develop this to be more proficient. Scheduling and out-of-office needs are communicated beforehand with a lead with only minor lapses, and doesn't occur again after follow-up. Leads are updated directly about workloads that exceed the team member's bandwidth with only minor lapses that do not occur again after follow-up. 		<ul style="list-style-type: none"> Transparent, open, and proactive communication is provided. Communication is direct, but respectful. Scheduling needs and out-of-office needs are communicated clearly beforehand with their Lead. Leads are updated directly and proactively when workload or duties exceed their bandwidth. 	

Comments:	
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Other collaborating educator comments:

Additional check-in notes:

Phone Support Specialist (ZenDesk Talk)

Evaluator/Educator:

Week:

Date:

Category:	<p style="text-align: center;">Score</p> <p style="text-align: center;">Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.</p>					Total Score
	1	2	3	4	5	
<p>1. Technical skills using ZenDesk and ZenDesk Talk</p>	<ul style="list-style-type: none"> The team member uses all phone tools appropriately and efficiently. This includes answering and ending calls, transferring calls, and putting customers on-hold. Admin processes are not followed. 		<ul style="list-style-type: none"> The team member uses all phone tools appropriately and efficiently most of the time. This includes answering and ending, transferring, and putting calls on-hold with only rare mistakes. Admin processes are followed with only minor mistakes. 		<ul style="list-style-type: none"> The team member always uses all phone tools appropriately and efficiently. This includes answering and ending, transferring, and putting calls on-hold. Admin processes are always followed. 	
<p>Comments:</p>						
<p>2. Communication Ability and Competence</p>	<ul style="list-style-type: none"> The team member forgets to introduce themselves consistently at the start of a call. Proper expectations are not stated at the start of calls. Questions are not identified correctly, or answered directly in a reply. Opportunities to request clarifying information are missed. Information and workflow processes are difficult to understand and follow, or are incorrect. 		<ul style="list-style-type: none"> The team member introduces themselves most of the time at the start of a call. Proper expectations are occasionally set at the start of the call.. Questions are identified and answered, but there are areas of opportunity to answer more directly or immediately in the call. The team member shows the opportunity to be more proactive when gathering information to resolve an issue. Information and workflows are mostly clear and manageable, but the team 		<ul style="list-style-type: none"> The team member always introduces themselves at the start of a call. Proper expectations are always set at the start of every call. The team member identifies the issue and answers questions in a correct, direct, and timely manner. Information is requested or clarifying questions are asked, when necessary, to answer or resolve an issue. Information and workflows are stated in a clear, manageable, and easily understood manner. 	

			member shows the opportunity to develop a better tone on the call.			
Comments:						
2. Content and Product Knowledge	<ul style="list-style-type: none"> The team member provides accurate workflows and product information less than 60% of the time. The team member frequently creates tickets for calls that should have been resolved over the phone. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 60-90% of the time. The team member, at times, will create tickets for questions that should have been resolved on the call. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 90% or more of the time. The team member addresses all appropriate customer questions in the call, and creates follow-ups for any that could not be answered appropriately in the call. 	
Comments:						
3. Call Follow-up	<ul style="list-style-type: none"> The team member consistently forgets to leave an internal note with an accurate call summary. The team member does not split tickets when making follow-up tickets, and often makes mistakes when they do. The team member consistently forgets a ticket tag/disposition and when they include one there is opportunity to become more accurate with their choice. Appropriate resources are not provided after a call in follow-up communications. 		<ul style="list-style-type: none"> The team member leaves an internal note with an accurate call summary most of the time. When necessary, the team member splits their ticket correctly when making follow-up tickets most of the time. Mistakes when made are minor. The team member includes a ticket tag/disposition, but there is opportunity to become more accurate with their choice. Appropriate resources are provided after a call in follow-up communications most times. 		<ul style="list-style-type: none"> The team member always leaves an internal note with an accurate call summary. When necessary, the team member always splits their ticket correctly when making follow-up tickets. The team member always uses an accurate ticket tag/disposition. Appropriate resources are provided after a call in follow-up communications. 	
Comments:						
4. Time Management	<ul style="list-style-type: none"> The team member doesn't not manage their time effectively by working inefficiently. Calls frequently go over the average 15 minute guideline by more than 10 minutes. The team member does not provide clear expectations most times about when a call needs to end and/or when a new form of support is needed. There is an opportunity to state expectations more clearly and consistently. 		<ul style="list-style-type: none"> The team member shows some minor opportunities to manage their phone time more effectively by becoming more efficient. Call length go over the average 15 minute guideline occasionally by 5-10 minutes. The team member provides clear expectations most times about when a call needs to end and/or when a new form of support is needed. There is an opportunity 		<ul style="list-style-type: none"> The team member manages their phone time effectively and efficiently. Call length stays at or below the 15 minute average guideline. The team member provides clear expectations about when a call needs to end and/or when a new form of support is needed. 	

	<ul style="list-style-type: none"> The team member is consistently late going online at the start of their shift. After ending a call, the team member consistently forgets to go back online to be available again for future calls. 		<p>to state expectations more clearly.</p> <ul style="list-style-type: none"> The team member is online at the start of their shift most times, and is only late on rare occasions. After ending a call, the team member goes back online to be available again for future calls, but shows the opportunity to become more efficient about going online more quickly. 		<ul style="list-style-type: none"> The team member is always online at the start of their shift, After ending a call, the team member goes back online to be available again for future calls in a timely manner. 	
Comments:						
5. HIPAA Compliance	<ul style="list-style-type: none"> The team member does not follow HIPAA guidelines including redacting PHI, not sharing PHI, and redacting all documents that include PHI. The team member consistently forgets to remind customers about avoiding sharing PHI at the start of the call. Identity verification steps are not taken at the start of every call appropriately. The team member does not verify the customer nor receive the proper consent prior to making any account changes. 		<ul style="list-style-type: none"> The team member follows all HIPAA guidelines including redacting PHI, not sharing PHI, and redacting all documents that include PHI with only minor mistakes. The team member reminds customers to avoid sharing PHI at the start of a call most times, but occasionally forgets. Identity verification steps are taken at the start of every call most times, but occasionally are forgotten and requested later in the call. The team member verifies the customer's identity and receives consent prior to making any account changes, but occasionally makes minor mistakes. 		<ul style="list-style-type: none"> The team member follows all HIPAA guidelines including redacting PHI, not sharing PHI, and redacting all documents that include PHI. The team member always reminds customers to avoid sharing PHI at the start of a call. Identity verification steps are taken at the start of every call appropriately. The team member verifies the customer's identity and receives proper consent prior to making any account changes. 	
Comments:						

Other collaborating educator comments:

Additional check-in notes:

90 Day or 12 Week Check-in:

Evaluator/Educator:

Week:

Date:

Writing & Verbal Skills

Overview:

Category:	Score Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					Total Score
	1	2	3	4	5	40

1.Content & Product Knowledge	<ul style="list-style-type: none"> The team member provides accurate workflows and product information less than 60% of the time. HIPAA guidelines and/or Admin processes are not followed, and resources are not consistently provided within their replies. Frequent areas of opportunity to include more accurate content and product knowledge, complete workflows, or additional context. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 60-90% of the time. HIPAA guidelines are adhered to, most Admin processes are followed, and resources are included but not consistently. There are specific areas of opportunity in their content and product knowledge such as more accurate information, more complete workflows, or the opportunity to provide additional context about an issue. 		<ul style="list-style-type: none"> The team member provides accurate workflows and product information 90% or more of the time. HIPAA guidelines are adhered to, Admin processes are followed, and resources are included. Their content and product knowledge is consistent, precise, and edited for the customer's workflow accurately. 	
Writing score (tickets, Chat)						
Verbal score (calls, classes)						
Comments:						
2. Communication Ability/Competence	<ul style="list-style-type: none"> Questions are not identified correctly, or answered directly in a reply. Opportunities to request clarifying information are missed. Information and workflow processes are difficult to navigate or follow, and/or are incorrect. 		<ul style="list-style-type: none"> Questions are identified and answered, but there are areas of opportunity to organize information as to answer more directly or immediately in a reply. Clarifying questions and requests for information are not asked consistently when appropriate, and resources are mostly meaningfully related, but sometimes are tangential. Information and workflows display thoughtfulness, but clearly demonstrate areas needed for growth. 		<ul style="list-style-type: none"> The team member identifies the issue and answers questions in a correct, direct, and timely manner. Appropriate information is requested when necessary to answer, and the team member provides meaningful and related resources. Information and workflow processes are written in a manageable and easily navigated format. 	
Writing (tickets, Chat)						
Verbal (calls, classes)						
Comments:						

3. Vocabulary and Language	<ul style="list-style-type: none"> Multiple areas of opportunity to develop a more precise understanding of SimplePractice company- and product-related language (such as features, groups, and resources). Appropriate language and vocabulary are not used consistently, or are not consistent with current expectations, processes, or procedures. 		<ul style="list-style-type: none"> The team member shows an understanding of SimplePractice company- and product-related language (such as features, groups, and resources), but some inconsistencies are present. Appropriate language and vocabulary are used most of the time, but areas of opportunity to use more precise or appropriate language or vocabulary are present. 		<ul style="list-style-type: none"> SimplePractice company- and product-related language (such as features, groups, and resources) are reflected correctly in all customer correspondences (tickets, Chats, and calls). Additionally, language and vocabulary used is consistent with current expectations, processes, and procedures. 	
Writing (tickets, Chat)						
Verbal (calls, classes)						
Comments:						
5. Formatting	<ul style="list-style-type: none"> Formatting does not follow guidelines, including spacing, bolding, and the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists to craft clear replies. Resources and hyperlinks are not consistently bolded and embedded within text. Paragraph breaks are highly irregular or overly frequent, such that they bear no relation to the organization of the content of the reply. 		<ul style="list-style-type: none"> Formatting follows guidelines most of the time, but reflects areas of inconsistency in terms of spacing (paragraphs, sentences, etc.), bolding (navigational steps and action items), the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists, and how resources and hyperlinks are formatted. Content is clear and appropriately concise most of the time. 		<ul style="list-style-type: none"> Formatting guidelines such as spacing (paragraphs, sentences, etc.), bolding (navigational steps and action items), and the use of ordered (i.e., numbered) or unordered (e.g., bulleted) lists are consistently used correctly. Resources and hyperlinks are consistently bolded and embedded in text. Paragraph breaks reinforce the content organization so that information is clear and manageable. 	
Writing (tickets, Chat)						
Comments:						
6. Grammar	<ul style="list-style-type: none"> Frequent grammatical lapses, incorrect language, and/or poor syntax interfere with the meaning of the replies. Verb tense and subject-verb agreement are not constructed correctly. Substantial need for editing. 		<ul style="list-style-type: none"> Occasional grammatical lapses, incorrect language, and/or poor syntax. Some opportunities for editing exist, but are not severe enough to impact the meaning of the reply. Verb tense and subject-verb agreement are generally constructed correctly with minor inconsistencies. 		<ul style="list-style-type: none"> Replies are constructed with correct and consistent grammar and language. Syntax is crafted correctly, with no run-on sentences or sentence fragments, producing clear logical replies. <ul style="list-style-type: none"> Verb tense and subject-verb agreement are constructed correctly with minor inconsistencies. 	

Writing (tickets, Chat)						
Comments:						
7. Punctuation	<ul style="list-style-type: none"> Basic punctuation tends to be omitted, haphazard, or incorrect, often including both internal sentence punctuation and end-of-sentence punctuation. 		<ul style="list-style-type: none"> Generally the end-of-sentence punctuation is correct, but internal punctuation (e.g., commas) may sometimes be incorrect. Only minor instances where punctuation is forgotten or missed. 		<ul style="list-style-type: none"> Effective and correct use of punctuation to separate sentences and their elements to clarify meaning. Punctuation is not missed or forgotten. Punctuation reflects tone (e.g., exclamation points are avoided unless use is initiated by the customer, and then only used with care while maintaining a professional tone). 	
Writing (tickets, Chat)						
Comments:						
8. Mechanics: Capitalization, Spelling, & Numerals	<ul style="list-style-type: none"> Capitalization is inconsistent and appears random. Numerous spelling errors or typos. Readability and meaning of replies are significantly impaired, reflecting numerous opportunities for extensive editing. 		<ul style="list-style-type: none"> Capitalization is generally consistent and accurate. Errors, if any, are minor. Spelling is usually correct, and there are few typos. The meaning and readability of replies are not impaired due to mechanics. 		<ul style="list-style-type: none"> Capitalization is correct and follows writing mechanical guidelines (e.g., the first word of a sentence and proper nouns are all capitalized). Additionally, SimplePractice features, resources, and language within the product are all referenced with correct capitalization. Spelling is consistently correct, and there are no typos. 	
Writing (tickets, Chat)						
Comments:						

Other collaborating educator comments:

Professional Competencies

Overview:

Category:	Score					Total Score
	Scores of 2 or 4 indicate the team member's performance falls between the surrounding metrics.					
	1	2	3	4	5	35
1. Time Management: Customer replies	<ul style="list-style-type: none"> The team member consistently struggles to send out tickets requiring a reply within 24 hours. The team member often waits longer than 10-15 minutes to ask questions or investigate an issue to develop a reply showing extensive areas of opportunity for improvement in time-management. 		<ul style="list-style-type: none"> Tickets requiring a reply are almost always replied to within 24 hours. Inconsistencies in reply time are rare. The team member shows opportunity for improvement when asking questions or investigating within the 10-15 minute guideline, often taking longer to develop a reply. 		<ul style="list-style-type: none"> Tickets requiring a reply are followed-up within 24 hours. Questions are asked in an appropriate time frame (i.e., 15 minutes). The team member allocates their time appropriately when investigating and writing a ticket reply (i.e., 15 minutes within the first 6 weeks, and 10-15 minutes within the second 6 weeks). 	
Comments:						
2. Resource Utilization and Investigative Skills	<ul style="list-style-type: none"> The team member struggles to grasp adequate understanding of how to utilize company resources (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not utilized when necessary to gather context or ask questions. The team member doesn't display solution-oriented thinking, and often does not utilize resources to investigate or test an issue. 		<ul style="list-style-type: none"> The team member understands company resources, but fails at times to utilize them appropriately (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are not consistently but often are utilized to ask questions and gather context when necessary. The team member displays some investigation or testing in their training account when asking questions, but on minor occasions doesn't utilize resources to investigate an issue. 		<ul style="list-style-type: none"> The team member understands and uses company resources to find answers (e.g., Asana, Guru, macros). Educators, mentors, and group point persons (SMEs) are used when necessary to gather context and facilitate efficient question asking. Solution-oriented thinking is displayed. The team member can discuss what they've already investigated, tested in their training account, or the resources used when asking questions. 	

Comments:						
3. Receptiveness and Responsiveness to Feedback	<ul style="list-style-type: none"> The team member struggles to acknowledge and understand feedback, and rarely asks for clarification if needed. They are not self-motivated, and do not take actionable steps on strategies for improvement when necessary. They struggle to review their progress, and do not make noticeable improvements in response to feedback. 		<ul style="list-style-type: none"> The team member acknowledges and understands feedback, and asks for clarity most times. Self-motivated, and they take actionable steps on strategies for improvement when necessary. They irregularly review their progress, and make minor or slow improvements in response to feedback. 		<ul style="list-style-type: none"> The team member always acknowledges and understands feedback, and asks for clarity when necessary. They are self-motivated and take actionable steps on strategies for improvement. They regularly review their progress, and make noticeable and productive improvements in response to feedback. 	
Comments:						
4. Initiative	<ul style="list-style-type: none"> The team member does not engage in requesting feedback. There is little to no proactive feedback provided in relation to the group's goals, and is often not delivered to the person(s) who can make change. The team member may mention ideas or points of improvement, but they fail to follow up in the proper forums. When possible and appropriate, there is little initiative to respond to or assist peers. 		<ul style="list-style-type: none"> The team member shows areas of opportunity to request feedback more proactively. The team member occasionally provides meaningful feedback to the individual(s) who can make change, but there are opportunities to develop. Initiative is inconsistent when they have ideas or see areas of improvement, and are only sometimes followed up with (e.g., Knowledge Requests, speaking with product squad members, or adding suggestions to the Training board). When possible and appropriate, there is inconsistent initiative to respond to or assist peers. 		<ul style="list-style-type: none"> The team member is engaged, proactive in asking questions, and appropriately requests feedback. They are proactive in providing meaningful feedback related to the group's goals, and provide it to the individual(s) who can make change. Initiative is taken when they have ideas or see areas of improvement to follow up in the proper forum (e.g., Knowledge Requests, speaking with Product Squad members, or adding suggestions to the Training board). When possible and appropriate, they are responsive and helpful to peers when coverage is needed or questions are asked. They are engaged in education and group discussions. 	
Comments:						
5.	<ul style="list-style-type: none"> The team member struggles to take ownership of job responsibilities, and doesn't take 		<ul style="list-style-type: none"> The team member takes ownership of their responsibilities and mistakes. 		<ul style="list-style-type: none"> The team member takes ownership of their responsibilities and mistakes. 	

Accountability	<p>ownership of mistakes.</p> <ul style="list-style-type: none"> Responsibilities are consistently incomplete, or not completed on time. They require consistent reminders. Their calendar is not up to date, and they frequently do not take lunch before the 5-hour mark even after follow up. The team member is not up to date with company, procedural, and product updates, and clarification is rarely asked for. 		<ul style="list-style-type: none"> Responsibilities are generally completed in a timely manner. The team member occasionally needs reminders. The team member's calendar is generally updated and organized to ensure lunch is taken before the 5 hour mark with only minor lapses that do not occur again after follow up. Minor delays in staying up to date with company, procedural, and product updates. Clarification is asked for when needed, but opportunities to stay up to date (e.g., reviewing the Daily Rollup/Release Radar) are sometimes forgotten. 		<ul style="list-style-type: none"> Responsibilities are completed in a timely manner. Their calendar is updated and organized appropriately to allow adequate time for all responsibilities, including taking lunch before the 5-hour mark. They are self-motivated, professional, and reliable. Company, procedural, and product updates (e.g., Daily Rollup/Release Radar) are understood and kept up with. Clarification is requested when needed. 	
Comments:						
6. Outlook and Growth Mindset	<ul style="list-style-type: none"> The team member does not contribute to company goals or display a strong work ethic. They often lose sight of what is best for the customer, and in turn the company. The team member shows a lack of flexibility when faced with change. They show little interest in supporting their team members when an extra hand is needed. 		<ul style="list-style-type: none"> The team member generally contributes to company goals. They can occasionally lose sight of what is best for the customer, and in turn the company. However, they are usually customer oriented. The team member is usually positive, approachable, and maintains a supportive and productive environment, but may need the occasional reminder. 		<ul style="list-style-type: none"> The team member contributes to company goals through a strong work ethic. They are customer oriented and focused on providing customer value using good judgment. They are positive, approachable, and maintain a supportive and productive environment. 	
Comments:						
7. Communication	<ul style="list-style-type: none"> The team member shows large areas for opportunities to develop more direct, proactive, and open communication. Scheduling needs and out-of-office needs are not communicated beforehand even after follow-up has occurred. Workloads that exceed a team member's bandwidth are not communicated, and behavior doesn't change after feedback. 		<ul style="list-style-type: none"> The team member has transparent, open, and proactive communication, but shows minor areas of opportunity to develop this to be more proficient. Scheduling and out-of-office needs are communicated beforehand with a lead with only minor lapses, and doesn't occur again after follow-up. Leads are updated directly about workloads that exceed the team member's 		<ul style="list-style-type: none"> Transparent, open, and proactive communication is provided. Communication is direct, but respectful. Scheduling needs and out-of-office needs are communicated clearly beforehand with their Lead. Leads are updated directly and proactively when workload or duties exceed their bandwidth. 	

			bandwidth with only minor lapses that do not occur again after follow-up.			
Comments:						

Overall feedback and Comments:

End of onboarding strengths:

- 1.
- 2.
- 3.

End of onboarding areas of opportunity:

- 1.
- 2.
- 3.