

Ground Advisor QA Rubric

Audit Date:
 Student Number:

Call Details:

Ground Advisor			
Element	Element	Result	Coaching Comments
1	Script / Structure and Direction / Control	Meets Expectation	
2	Building Rapport	Meets Expectation	
3	Layered Questions / Active Listening	Meets Expectation	
4	College / Program Information	Meets Expectation	
5	Selling Appointment	Meets Expectation	
6	Request for PDL	Meets Expectation	
7	Overcoming Obstacles	Meets Expectation	
Compliance Code of Conduct		Pass/Fail	Coaching Comments
	Code of Conduct for Misrepresentation or Compliance Failure	Pass	
RUBRIC RESULT		Meets Standard	

Meeting Schedule

Report Indicators

- Shared Laughter
- Meaningful prospect acknowledgment of mutual experience
- Student conveys message(s) with emotional content (other than anger / displeasure with rep)
- Student shares confidential, sensitive, or personal information
- Student tells stories
- Student's responsiveness (length or depth of meaning of responses) increases over call
- Student acknowledges self-discovery (a moment, epiphany)

	Does not meet expectation 1	Needs Improvement 2	Meets Expectation 3	Exceptional 4
Script / Structure and Direction / Control	No attempt is made by CAC to structure conversation topically or follow the phone script. CAC does not have control of the call and the prospective student is asking all the questions. The call is very transactional.	CAC fails in nominal attempts to structure conversation topically or move it in the right direction based on the script guidelines. CAC follows script in a rigid, rote manner which limits natural conversation.	Conversation is structured topically and follows the script outline. CAC moves the call in the right direction based on the script and the conversation is organic and not disjointed.	CAC demonstrates skill in guiding a natural conversation with topical structure in the script outline.
*Building Rapport	0 indicators of rapport. CAC is disinterested, rude, or has an unfriendly tone. CAC does nothing to foster the rapport.	1-2 indicator(s) of rapport are present during the conversation but the CAC does not receive the information with the appropriate response. CAC lacks interest or does not acknowledge the information in a sincere manner.	1-2 indicator(s) of rapport are present during the conversation and the CAC has a meaningful exchange with the prospect with allows the prospect to feel validated in sharing information, laughter, etc.	2+ indicators of rapport are present during the conversation and the CAC not only expresses a sincere and interested response but fosters more rapport to be built by their active engagement in the conversation.
Layered Questions / Active Listening	CAC asks no layered questions.	CAC asks questions unrelated to the prospect's responses.	CAC asks 1-2 relevant, layered series of questions.	CAC asks 3 or more productive, relevant series of layered questions.
Program Information	No program information is discussed.	Program information is briefly discussed but the information given is vague and sounds scripted and/or canned.	CAC is skillful in identifying what is important to the prospective student and tailors the program information based on those needs.	CAC tailors the program information based on the prospective student's needs and does so in an enthusiastic and sincere way which generates an excited response from the prospect.
Selling Appointment	No attempt is made to set a personal appointment. No attempt is made to set same day or 24 hour appointment.	Passive offering for same day/next day appointment are attempted. Passive voice, accommodating, does not try to set appointment within 24 hours of conversation. If prospect asks for appointment further out, there is no dialogue as to why they cannot come in sooner, no further value is presented in appointment, no timeframe of appointment is explained. *see below for further examples	Advisor presents value of personal appointment and is directive in scheduling an appointment within 24 hours of the conversation.	Advisor overcomes objections to appointment within 24 hours. Advisor is skillful in overcoming objections and schedules the appointment within 24 hours of the conversation.
Request for PDL	Advisor does not ask for PDL.	Advisor is passive in approach to ask for PDL. No value presented in prospect bringing a guest along, no explanation as to why advisor is extending an invitation to a friend or family member. *see below for further examples	Advisor is directive in asking for a PDL. Advisor clearly explains reason that they are asking for PDL.	Advisor asks for a PDL with an assumptive, open ended question. Advisor presents value to prospect in bringing in a friend or family member with some dialogue about how it is favorable to go to school with a friend for a study buddy or to bring in someone to appointment for an extra set of eyes and ears. *see below for further examples
Overcoming Obstacles	No attempt is made to overcome obstacles or objections to a personal appointment	If obstacle to appointment is presented, advisor offers different day/time for the appointment. No attempt is made to identify or overcome appointment obstacles.	If objection to appointment is presented, advisor nominally attempts to identify and/or overcome obstacle. In case when prospect presents no objection to personal appointment, will be marked as "Meets".	Is skillful to identify obstacle to initial appointment and offers secondary appointment time based on Prospect response. Reinforces value of appointment, leverages rapport and/or control authority to identify root cause of appointment time objection.

Script / Structure

Critical Script Elements

Thorough understanding of Current Situation
Thorough understanding of Desired Situation
Successful Transition to Appointment

Non-Critical Script Elements

Gain Control
Detailed and Accurate Recap
Skillful dialogue for Support / PDL

* Rapport Indicators

Please note: A true rapport indicator must include an appropriate response from the CAC.

It is not enough for the prospect to simply share information, it needs to be received with sincere emotion from the CAC.

Shared laughter

Meaningful prospect acknowledgment of mutual experience

Student conveys message(s) with emotional content (other than anger / displeasure with advisor)

Student shared confidential, sensitive, or personal information

Student tells stories

Student's responsiveness (length or depth of meaning in responses) increases over the call

Student acknowledges self-discovery (a moment, epiphany)

Layered Questions

A layered question is a unique question that prompts for 1 or more follow-up questions.

Ex: "Are you working?", "Where do you work?", "How long have you been there?", "What do you like/dislike?"

The above example is considered 1 layered question as all follow-up questions are prompted from the initial response

Selling Appointment

Needs Improvement Examples:

Once advisor offers same day appointment and prospect requests a day further out, advisor does not ask questions to determine if a sooner appointment can indeed be made.

Ex: Prospect - "Today doesn't work for me, but I can come in tomorrow or next week."

Advisor - "OK, how about tomorrow at noon?"

This would be a needs improvement since the advisor does not ask follow up questions such as: can you come in later today? What do you have going on today? This should only take an hour or so?

Request for PDL:

Needs Improvement Examples:

Ex: Prospect mentions that they are married and advisor tells prospect that he/she is welcome to bring in spouse to appointment.

This is inviting specific person and not opening up invitation to any others who may be interested, no dialogue or explanation as to why they are inviting spouse.

Ex: Advisor simply says that prospect is welcome to bring in a friend or family member but does not explain any reason why they are extending invitation.

Below is an example of good dialogue (Meets Expectation) for the PDL portion of the conversation.

Advisor: "You are welcome to bring in a friend or family member for support or someone who may also be interested in going to school.

We find that students who have study buddies do well and you may also be helping out a friend who has been interested in going to school but hasn't taken the first step."

Advisor: "Keep in mind that we encourage you to bring in a friend or family member not only who may be interested in going to school but who can come in with you and be an extra set of eyes and ears, maybe ask some questions you have not thought of."

Exceptional Examples:

Advisor: "Who will you be bringing in with you today?"

Prospect: "I am not sure, I haven't thought about that."

Advisor: "Do you know anyone who is looking to go to school as well?"

Prospect: "I might have a friend who's interested."

Advisor: "Great, what's your friend's name? I will put them down as your plus 1 and we can go over the information all together when you are here today.

We have found that it can be very helpful to students who have a friend attending along with them."