



AccuVision™ CUSTOMER SERVICE SYSTEM

Feedback Report - Applicant

John Doe
111-11-1111

RESULTS

5 out of 10 people
with the same score as
John Doe have been successful
in performing the customer service
activities of their jobs.

The AccuVision™ Customer Service System measures customer service skills and abilities. Included here are skills such as creating and maintaining a positive company image, acting in a proactive manner, making sound decisions, developing solutions for dealing with problem situations, soliciting new or additional business from customers, and retaining business of existing customers. Technical knowledge and experience of the applicant are not measured by the system and are not considered when compiling the information in this report. This individual's overall performance is based on his/her specific responses to the situations presented in the AccuVision™ assessment.

AccuVision™ CUSTOMER SERVICE SYSTEM

DEVELOPMENTAL INFORMATION

For

John Doe

111-11-1111

This report provides feedback on the individual customer service skills measured in the evaluation, as well as additional developmental information. The information included is as follows:

SECTION I: SKILL RANKING

This section provides a definition of each of the three skills and ranks the participant's performance in each skill from the strongest (rank order 1) to the weakest (rank order 3). Those skills in which the participant's performance was above average are denoted by an 'X'. This information can be used to direct the training activities of the participant. Training should be considered for any skill without an 'X' and the lowest ranked skills should be trained first.

SECTION II: SKILL AND TASK ANALYSIS

This section provides an analysis of the tasks that comprise each of the skills assessed by the system. The participant's performance in each task is reported as either being acceptable or needing development. This information can be used to further specify the participant's training activities within each skill area.

SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

This section provides suggested activities the participant can engage in to improve performance in the skill areas most in need of development. These performance development strategies can be shared with others in the organization that are in a position to assist in implementing a developmental plan. When considering a developmental plan, keep in mind that these suggestions are intended to supplement rather than replace other formal developmental activities. Keep in mind that there are numerous training programs, local college courses, books, and additional resources that are available to assist you in your developmental efforts.

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SECTION I: SKILL RANKING

| <u>SKILL</u> | <u>Rank *</u> | <u>Performance **</u> |
|---|---------------|-----------------------|
| | <u>Order</u> | <u>Level</u> |
| CUSTOMER RELATIONS | | |
| To create and maintain a positive company image by interacting with others in a polite, professional, and proactive manner. | 3 | |
| JUDGMENT | | |
| To make sound decisions regarding the application of policies and guidelines, as well as develop solutions for dealing with problem situations. | 1 | X |
| SOLICITS NEW OR ADDITIONAL BUSINESS | | |
| To effectively solicit new or additional business from customers, as well as retain business of existing customers. | 2 | |

* Rank Order: 1 represents the individual's strongest skill - comparing him/her only to him/herself. Note that one person's best skill may be less strong than another person's weakest skill.

** Performance Level: X indicates that on this skill the participant scored better than 65% of the people in the AccuVision™ database

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SECTION II: SKILL AND TASK ANALYSIS

Effective performance in the situations depicted in the tape required the application of different skills. Below is a listing of the simulated work activities, clustered according to the skill most needed to effectively perform them. Also, the individual's performance level (acceptable or needs development) is indicated for each work activity associated with the skill.

CUSTOMER RELATIONS:

To create and maintain a positive company image by interacting with others in a polite, professional, and proactive manner.

Situations In Which the Participant's Performance Was Acceptable

- Deals with customers regarding service/product complaints.
- Interacts with customers who make unreasonable demands or have unjustified complaints.

Situations In Which The Participant's Performance Needs Development

- Explains policies and procedures to customers.
- Interacts with irate/angry customers in a polite and helpful manner.
- Contacts customers to discuss/resolve problems.

JUDGMENT:

To make sound decisions regarding the application of policies and guidelines, as well as develop solutions for dealing with problem situations.

Situations In Which the Participant's Performance Was Acceptable

- Decides when to route customer calls/requests to other departments based on the particular nature of the call/request.
- Interacts with peers to obtain or provide historical information concerning a customer problem/issue.

Situations In Which The Participant's Performance Needs Development

- Decides when to vary from routine operating policies/guidelines and when to adhere to them.
- Decides when to independently make decisions versus when to defer to a supervisor.
- Independently makes decision to change own work schedule in order to deal with unexpected requests from customers.

SOLICITS NEW OR ADDITIONAL BUSINESS:

To effectively solicit new or additional business from existing or potential customers, as well as retain business of existing customers.

Situations In Which the Participant Is Performance Was Acceptable

- Solicits new/additional business from customers.
- Determines the immediacy of, and schedules, work requests received from customers.
- Explains features and benefits of goods/services to customers or prospective customers.

Situations In Which The Participant's Performance Needs Development

- Solicits pertinent information from customers to clarify their inquiry or complaint.
- Explains cause of service/product problem to customers.

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SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

SKILL: CUSTOMER RELATIONS

TASK: EXPLAINS POLICIES AND PROCEDURES TO CUSTOMERS

- Provide information in a simple and easy to understand manner. Avoid "technical" terms that the customer may not clearly understand.
- A large number of policies and procedures affect your interactions with customers. In addition to simply understanding the policies/procedures, it is important to understand why they exist.
- Bear in mind that although policies or procedures may not allow you to comply with a customer's direct request, alternative courses of action may allow you to fully or partially meet the actual needs of the customer.
- If a customer's request cannot be accommodated because of policy or procedure, attempt to explain why the policy/procedure exists. No customer wants to be told that a request can't be met simply because the request is "against our policy."
- In many instances where a customer feels inconvenienced by policies/procedures, it may be possible to explain how the policy/procedure actually benefits the customer.
- Through discussions with your supervisor, develop a clear understanding of the policies/procedures that have some degree of flexibility versus those that do not, and clarify the limits of your personal authority to make exceptions.
- If you are unable to comply with a customer's request because of policy, try to create a positive image of the company by showing empathy for the customer's situation. Apologize for any inconvenience the customer may have as a result of the policy and your inability to meet his/her request.

Note: Pages in Section III can be customized to include credit and non-credit course and training program information.

SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

SKILL: CUSTOMER RELATIONS

TASK: INTERACTS WITH IRATE/ANGRY CUSTOMERS IN A POLITE AND HELPFUL MANNER

- When a customer voices a complaint or problem, apologize and demonstrate concern for any inconvenience caused to the customer. Remember that what may seem a slight or minor problem to you may be a very significant issue to the customer.
- In some instances, the actions of the customer may have contributed to a problem. In dealing with these types of situations, provide the customer with suggestions as to how similar problems can be avoided in the future. However, when doing so, it is important to avoid making any comments that could be interpreted as "blaming" the customer.
- Occasionally an angry customer may verbally attack you for a real or imagined problem. As soon as possible, ask the customer to explain the specifics of the problem. If you can get the customer focused on the problem and you demonstrate a concern for resolving the problem, the customer may become calmer.
- Accept ownership for problems or complaints. Even though you may have had nothing to do with a problem, you represent the organization to the customer. Avoid blaming "others" or "procedures" for problems that occurred. In many instances in which a customer feels inconvenienced by policies/procedures, it may be possible to explain how the policy/procedure actually benefits the customer.
- Occasionally, when a customer is angry, it may be necessary to allow the customer to vent his/her frustrations. Remember that the customer is generally angry at the situation or the circumstances, not at you personally. Retain control of the situation by remaining calm and guiding the customer toward resolution of the problem/situation as soon as possible.

Note: Pages in Section III can be customized to include credit and non-credit course and training program information

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SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

SKILL: CUSTOMER RELATIONS

TASK: CONTACTS CUSTOMERS TO DISCUSS/RESOLVE PROBLEMS

- Be proactive and attempt to make the customer's job easy. If you must research a customer's problem and contact the customer at a later time, take the initiative to call the customer back.
- Avoid asking the customer to call you back. Take ownership for solving the customer's problem. After you have taken the necessary actions to deal with the customer's problem, identify yourself to the customer and encourage him/her to contact you if any additional actions are necessary.
- When a customer voices a complaint or problem, apologize and demonstrate concern for any inconvenience caused the customer. Remember that what may seem a slight or minor problem to you may be a very significant issue to the customer.
- If a customer has experienced a recurring problem, in addition to explaining the cause of the problem, explain to the customer the actions that will be taken to insure that the problem does not continue.
- If it is necessary to explain the cause of a problem to a customer, keep your initial explanations brief and to the point. If the customer requires more information, he/she will ask for it. It is usually unnecessary to provide a long and detailed explanation of the events that caused a problem and doing so may only create additional questions or concerns in the customer's mind.
- Accept ownership for problems or complaints. Even though you may have had nothing to do with a problem, you represent the organization to the customer. Avoid blaming "others" or "procedures" for problems that occur.

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SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

SKILL: SOLICITS NEW OR ADDITIONAL BUSINESS

TASK: SOLICITS PERTINENT INFORMATION FROM CUSTOMERS TO CLARIFY THEIR INQUIRY OR COMPLAINTS

- Make it a practice to keep a note pad and pencil at your work station. Make notes on the pertinent facts provided by the customer and any follow up actions you commit to perform. If the customer's situation cannot be resolved immediately, don't rely simply on your memory.
- Ask questions in an open-ended manner. Questions such as, "Can you tell me more about the problem?" will enable you to gather more detailed information.
- After a customer has explained the facts surrounding a situation, restate the key points to the customer. This will help to ensure that you have accurately heard the information provided by the customer and assist in preventing misunderstanding by either party.
- If follow up action is required to resolve a customer's problem, at the end of your conversation summarize the actions that will be taken and within what time-frames they will occur. This will assist in preventing misunderstanding by either party as to what will be done.
- Recognize that direct contact with the customer represents a sales opportunity. Gathering information from the customer may offer clues to a need for additional products or services.
- Use the information provided by the customer to determine which additional products or services would best benefit him or her.

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SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

SKILL: SOLICITS NEW OR ADDITIONAL BUSINESS

TASK: EXPLAINS CAUSES OF SERVICE/PRODUCT PROBLEM TO CUSTOMERS

- In some instances, the actions of the customer may have contributed to a problem occurring. When dealing with these types of situations provide the customer with suggestions as to how similar problems can be avoided in the future. However, when doing so, it is important to avoid making any comments that could be interpreted as "blaming" the customer.
- In some instances, you will need to obtain additional information on a customer's problem before you can determine the cause of the problem or the corrective actions that need to be taken. In these situations, be proactive and minimize the amount effort the customer must invest in order to resolve the problem. For example, instead of asking the customer to call you back after you have had an opportunity to research the problem, volunteer to call the customer back.
- If a customer has experienced a "one-time" problem and is not concerned that the problem will be recurring, the customer may not be interested in hearing the causes of the problem. In such instances, it may not be beneficial to explain the causes of the problems; doing so may be viewed by the customer as simply "making excuses."
- If a customer has experienced a recurring problem, in addition to explaining the cause of the problem, explain to the customer the actions that will be taken to insure that the problem does not continue.
- Even though you may have done nothing to contribute to a customer's problem, take personal ownership for resolving the problem. From the customer's perspective, you represent the company. Avoid placing blame on others or pointing out that you are not responsible for causing the problem.
- When explaining the cause of a problem to a customer, keep your initial explanation brief and to the point. If the customer requires more detailed information, he/she will ask for it. It is usually unnecessary to provide a long and detailed explanation of the events leading to the problem. A lengthy explanation may only serve to create additional questions or concerns for the customer.

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SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

SKILL: JUDGMENT

TASK: DECIDES WHEN TO VARY FROM ROUTINE OPERATING POLICIES/ GUIDELINES AND WHEN TO ADHERE TO THEM

- A large number of policies and procedures affect your interactions with customers. In addition to simply understanding the policies/procedures, it is important to understand why they exist.
- When you are required to take a decision to your supervisor or to another individual for approval, discuss the factors the other individual considers important and the rationale behind his/her decision. Discuss the different options that were considered and why some options were eliminated. Attempt to learn the decision-making process rather than simply obtain an "answer."
- Avoid wasting time on issues or problems that cannot be readily resolved. Learn to recognize problems or situations that cannot be settled without gathering additional data, and/or issues or situations that require the approval or involvement of others.
- Through discussions with your supervisor, develop a clear understanding of the policies/procedures that have some degree of flexibility versus those that do not, and clarify the limits of your personal authority to make exceptions.
- Keep a list of your most frequent customer interactions that necessitate considering an exception. Review the list with your supervisor and discuss the general decision-making process that should be used in dealing with these types of situations.
- Bear in mind that although policies or procedures may not allow you to comply with a customer's direct request, alternative courses of action may allow you to fully or partially meet the actual needs of the customer.
- Keep up-to-date on any changes in policy, particularly those that affect your daily dealings with customers.

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SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

SKILL: JUDGMENT

TASK: DECIDES WHEN TO INDEPENDENTLY MAKE DECISIONS WHEN TO DEFER TO A SUPERVISOR

- Through discussions with your supervisor, develop a clear understanding of the policies/procedures that have some degree of flexibility versus those that do not, and clarify the limits of your personal authority to make exceptions.
- Maintain ownership for resolving the customer's problem. Even though you may be required to involve others in information-gathering activities or obtain approval for certain actions, indicate to the customer that you will personally take the actions necessary to resolve the problem.
- When you are required to take a decision to your supervisor or to another individual for approval, discuss the factors the other individual considers important and the rationale behind his/her decision. Discuss the different options that were considered and why some options were eliminated. Attempt to learn the decision-making process, rather than simply obtain an "answer."
- Customers who experience a problem will often ask to speak directly with a supervisor. Before passing such calls on to the supervisor, attempt to question the customer on the nature of the problem, facts surrounding the situation, etc. If possible, attempt to handle the call personally.
- When confronted with a request that exceeds your authority, ask questions of the customer to gain a better understanding of his/her needs or desires. If you fully understand the reason for the request, you may be able to identify alternative courses of action that would assist the customer and that are within your direct authority to pursue.
- Keep a list of your most frequent customer interactions that necessitate exploring an exception to policies or procedures. Review the list with your supervisor and discuss the general decision making process that should be used in dealing with these types of situations.
- Avoid wasting time on issues or problems that cannot be readily resolved. Learn to recognize problems or situations that require the approval or involvement of a supervisor, or cannot be settled without gathering additional data.

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SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

SKILL: JUDGMENT

TASK: INDEPENDENTLY MAKES DECISION TO CHANGE OWN SCHEDULE IN ORDER TO DEAL WITH UNEXPECTED REQUESTS FROM CUSTOMERS

- Through discussions with your supervisor, develop a clear understanding of the degree to which you can alter your schedule, and clarify the limits of your personal authority to make changes.
- Learn to prioritize competing demands. Some customer requests may constitute an actual "emergency" and deserve to be given a priority status. Other requests may be more routine and can be handled without changing the work schedule. Seek advice and input from supervisors or experienced co-workers regarding which types of issues or requests take priority over regularly scheduled tasks.
- Maintain ownership for handling the customer's request or problem. Even though you may be required to involve others in information-gathering activities or obtain approval for certain actions, indicate to the customer that you will personally take the actions necessary to resolve the problem.
- Try to look at the situation from the customer's perspective. What may seem like a minor inconvenience or problem to you may be of great concern or importance to your customer.
- Remember that although policies or procedures may not allow you to comply with a customer's direct request, alternative courses of action may allow you to fully or partially meet the needs of the customer.
- If you are unable to comply with a customer's request, try to maintain a positive image of the company by showing concern for the customer's situation. Apologize for any inconvenience the customer may have experienced.