



Financial Services Call Center Skills (FSCC): Employer Feedback

Please check the 15 or so most important skills for this job. Although all of the following skills are important, **the checked competencies are required to qualify as an applicant.**

Check if required	Competencies Measured	
	1 Deals with irate or angry customers in a professional manner.	Customer Relations
	2 Develops rapport with customers/prospects.	Customer Relations
	3 Understands and accurately follows customers' instructions and request (when appropriate).	Customer Relations
	4 Listens to customers and understands both explicit and implicit aspects of their communication.	Customer Relations
	5 When discussing the features and benefits of products/services, <i>tailors own comments</i> in accordance with the expressed needs, goals, desires, etc. of the client.	Customer Relations
	6 Persists in work activities despite obstacles, setbacks, and unsuccessful efforts - is resilient.	Customer Relations
	7 Recognizes situations where additional internal resources (e.g. Manager) should be used.	Customer Relations
	8 Projects to customers an attitude of concern and desire to resolve problems.	Customer Relations
	9 Projects to customers/prospects an energetic and enthusiastic image.	Customer Relations
	10 When attempting to respond to customers' requests, makes sound decisions regarding when to vary from standard policy versus when to adhere to them	Customer Relations
	11 When dealing with customers who have complaints, uses questions to clarify complaint, understand needs and/or desired remedy, etc. <i>before</i> taking action.	Customer Relations
	12 Deals effectively with customers who make unreasonable requests/demands.	Customer Relations
	13 Explains company policies and procedures to customers/prospects.	Customer Relations
	14 Asks questions to obtain an understanding of customers' needs, goals, desires, and other pertinent information <i>before</i> suggesting specific products/services.	Customer Relations/ Sales
	15 Asks questions/uses other information gathering techniques with existing customers to identify potential selling opportunities	Sales
	16 Uses inbound service calls as an opportunity to "bridge" to sales activities.	Sales
	17 During sales related interactions, actively attempts to "close" - i.e., ask customers for their business.	Sales

	18	During sales activities, persists with sales attempts despite challenges/initial resistance by the customer/prospect.	Sales
	19	Explains product features and benefits to customers/prospects.	Sales
	20	Accurately enters customers' information into the computer system.	Data Entry
	21	Accurately obtains needed information via the computer system.	Data Entry
	22	Works with numbers -e.g., is able to quickly and accurately perform simple calculations during a call if needed.	Data Entry

Note: "Customer" refers both to individuals **external** to the organization and **internal** employees, i.e. persons in another unit/area.

The Job being considered is called: _____.

_____ Organization

Individual completing Form

_____ Date

Phone

E-Mail