



# AccuVision™ RETAIL SALES SYSTEM Customer Relations Section

From AlignMark

## Feedback Report - Incumbent

for  
John Doe  
111-11-1111

### RESULTS

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

The AccuVision™ Retail Sales System measures customer relations skills and abilities. Included here are skills such as creating and maintaining a positive company image, acting in a proactive manner, taking action to meet or exceed the performance expectations of others, making sound decisions, and developing solutions for dealing with problem situations. 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™ RETAIL SALES 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.

# AccuVision™ RETAIL SALES SYSTEM

## SECTION I: SKILL RANKING

<u>SKILL</u>	<u>Rank *</u> <u>Order</u>	<u>Performance **</u> <u>Level</u>
<b>INITIATING CUSTOMER CONTACT</b>  To determine customer needs for a product/service by listening and asking questions, as well as accurately explaining the benefits of the product/service. Included here is the ability to create a positive company image by interacting with others in a polite, professional and proactive manner.	2	X
<b>BUILDING CUSTOMER RELATIONS</b>  To build and maintain a positive company image. Included here is the ability to take action to meet or exceed the performance expectations of others by assisting peers and handling customer complaints when necessary.	3	
<b>DECISION MAKING/JUDGMENT</b>  To make sound decisions regarding the application of policies and guidelines, as well as develop solutions for dealing with problem situations. Included here is the ability to refer sensitive or difficult customer situations to management personnel or a more senior sales associate.	1	X

\* 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.

# AccuVision™ RETAIL SALES SYSTEM

## 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.

### **INITIATING CUSTOMER CONTACT:**

*To determine customer needs for a product/service by listening and asking questions, as well as accurately explaining the benefits of the product/service. Included here is the ability to create a positive company image by interacting with others in a polite, professional and proactive manner.*

#### **Situations In Which the Participant's Performance Was Acceptable**

- Determines customer's needs by listening and asking questions
- Clarifies needs of customer in order to determine individual product or service best suited for the customer

#### **Situations In Which The Participant's Performance Needs Development**

- Explains features and benefits of products or services to customers

### **BUILDING CUSTOMER RELATIONS:**

*To build and maintain a positive company image. Included here is the ability to take action to meet or exceed the performance expectations of others by assisting peers and handling customer complaints when necessary.*

#### **Situations In Which the Participant's Performance Was Acceptable**

- Responds to personal needs of customers

#### **Situations In Which The Participant's Performance Needs Development**

- Follow through on commitments made to customers
- Handles customer complaints
- Proactively assists peers for the purpose of increasing the overall quality of store operations

## **DECISION MAKING/JUDGMENT:**

*To make sound decisions regarding the application of policies and guidelines, as well as develop solutions for dealing with problem situations. Included here is the ability to refer sensitive or difficult customer situations to management personnel or a more senior sales associate.*

### **Situations In Which the Participant Is Performance Was Acceptable**

- Decides when to "bend" company policies/guidelines and when to follow them
- Decides when to take action on own versus when to refer to a manager or co-worker
- Decides when to route customers to other departments based on their needs

### **Situations In Which The Participant's Performance Needs Development**

- In all situations for this skill, performance was acceptable. (See Above)

# AccuVision™ RETAIL SALES SYSTEM

## SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

### SKILL: INITIATING CUSTOMER CONTACT

#### TASK: EXPLAINS FEATURES AND BENEFITS OF PRODUCTS OR SERVICES TO CUSTOMERS

- Become familiar with how different products and services offered by your store can benefit customers and know where each department is located. You should also keep up with new products and services by reading memos, newsletters, and catalogs. Also, if you are working in a setting where you will be meeting customers face-to face, make use of promotional materials during your interaction. Visual aids often help communicate your message about the product or service better than words alone. You know what they say -- a picture is worth a thousand words!
- When discussing the benefits of a product or service with a customer, tailor your comments to the specific customer. First, attempt to understand the needs of the particular customer by asking them open-ended questions. Check your understanding of their comments by restating in your own words what you view as the customer's major needs or concerns and ask them if your understanding is correct. Then tailor your comments using the information you have learned about the customer's needs and concerns.
- Avoid making one-sided speeches! Engage your customer in a discussion of the benefits of one product or service over another. Encourage the customer to ask questions and check his/her understanding of your comments. Help the customer to understand all the features associated with the product or service.
- Make every effort to keep your personal biases from influencing the customer's decision to purchase a product or service. Remember that you are trying to meet the customer's needs and not your own!
- Avoid "technical" jargon when speaking with the customer and do not assume that the customer knows something about your product or service. Make your comments simple and easy to understand.
- Keep a log of customer's questions or objections that you find difficult to deal with during selling efforts. Afterward, discuss ways of handling the questions or objections with your manager or with more experienced personnel.
- If you do not have the knowledge or background required to assist a customer, or the customer has asked you about a product/service that you cannot address, refer them to someone who can help them. There is nothing more unpleasant than for a customer to hear the phrase "I don't know" or "I can't help you with that". Moreover, do not make up an answer; customers do not like being sent on "wild goose chases".

# AccuVision™ RETAIL SALES SYSTEM

## SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

### SKILL: BUILDING CUSTOMER RELATIONS

#### TASK: FOLLOW THROUGH ON COMMITMENTS MADE TO CUSTOMERS

- Learn to recognize what type of customer requests should be given priority status, and those that are considered routine. Seek advice from your manager and other sales associates to define "priority" situations. This can be accomplished through "coaching" sessions or observation of your manager or another experienced sales associate.
- Be proactive and attempt to make the customer's "job" easy. If you must research a customer's problem and contact the customer later, take the initiative to call the customer back. Avoid asking the customer to call you back. Making the customer's job easy should be a practice you make part of your "routine" immediately.
- Accept ownership for customer problems or complaints. Although you may have had nothing to do with a problem, you represent the organization to the customer. Avoid blaming other people or procedures for problems that occur. After you have taken the necessary actions to deal with the customer's problem, identify yourself to the customer as someone they should contact if they have any additional needs.
- In cases where a customer has experienced a recurring problem with a product or service, explain to the customer the action that will be taken to insure that the problem does not persist.
- Learn procedures regarding merchandise availability. Become familiar with the shipping and delivery schedules of your particular location so that you are aware of when more merchandise will be delivered. You can relay that information to the customer.
- Commitments to customers may include placing special orders, checking on merchandise availability, verifying delivery schedules, etc. Be sure to follow-up on every customer inquiry to ensure that the needs of the customer have been met.
- Explain any relevant product guarantees and/or warranties when required and be certain that the customer understands any additional steps that must be taken to activate the warranty (i.e. mailing in registration card, etc.).
- Make a list of customer requests, questions or complaints that you have trouble handling. Discuss ways of handling these issues with a more experienced sales associate or your manager.
- Enlist the help of management and/or other sales associates to assist in keeping customer commitments. This can be accomplished by sharing information, recording customer problems, and updating store policies when necessary.

# AccuVision™ RETAIL SALES SYSTEM

## SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

### SKILL: BUILDING CUSTOMER RELATIONS TASK

#### TASK: HANDLES CUSTOMER COMPLAINTS

- When confronted by a demanding or difficult customer, try to establish a positive atmosphere by introducing yourself and letting the customer know that you are responsive to their needs. Also, allow angry customers to vent their frustrations before attempting to offer assistance or question them further. In most cases, a customer will tell you how you can help them if you allow them the opportunity to work through their initial frustration.
- When a customer voices a complaint or problem, apologize and demonstrate concern for any inconvenience caused. Remember that what might seem like a minor problem to you may be a very significant issue to the customer. Customers will calm down significantly if they believe you understand and appreciate their situation.
- Begin asking open-ended questions of the customer to uncover more information about the problem as soon as possible. Asking open-ended questions (i.e. "Can you tell me more about this problem?") will help focus the customer on the real issue and help you gather details and determine the extent/cause of the situation so that the proper type of assistance can be provided. Make sure you restate the key points to the customer. This will help to ensure that you have accurately understood the information provided by the customer.
- Avoid the temptation to explain the cause of the problem (e.g., "maybe you did not follow the instructions correctly") or recommend a solution (e.g., "you just need a replacement, that's all") without knowing all of the facts. Also, be careful to avoid placing blame when providing suggestions for how the problem can be avoided in the future.
- Accept ownership for problems or complaints. Keep in mind that although you personally may have had nothing to do with a problem, you represent the store/organization to the customer. Avoid blaming "others" or "procedures" for problems that occur. Customers who experience problems will often ask to speak directly with a manager. Before passing such problems to your manager, attempt to handle the situation personally.
- If a problem cannot be immediately resolved and follow-up contact with the customer is required, take responsibility for initiating the follow-up actions. For example, offer to call the customer instead of having the customer call or come back later.
- Initiate a brainstorming session with your manager and coworkers to generate possible reasons why you would want to refer a customer to store management as well as to learn how coworkers have handled customer complaints in the past. Also, keep a record of customer complaints and actions taken to resolve them to prevent or deal with future misunderstandings.

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## SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

### SKILL: BUILDING CUSTOMER RELATIONS

#### TASK: PROACTIVELY ASSISTS PEERS FOR THE PURPOSE OF INCREASING THE OVERALL QUALITY OF STORE OPERATIONS

- Through conversations with your manager and experienced sales associates, learn the general function of other departments. Further, seek opportunities to work with other departments/areas to get to know them better. Establish positive working relationships.
- Take the time to understand the roles and responsibilities of your co-workers, so that you are able to anticipate their needs. In addition, try to see issues and situations from their perspective before you ask for assistance or place additional demands on them for help.
- Take the initiative to help co-workers when needed; do not wait to be asked. In addition, make sure that others view you as approachable and helpful. Encourage others to ask you for assistance and advice.
- If a co-worker has more customers than they can handle, and you are available, (e.g., if you are not currently helping someone) offer your assistance to the customers that need help (i.e. direct them to your register, locate merchandise, etc.)
- Make use of coworkers when trying to come up with solutions to customer problems. Group problem solving often yields better solutions than individual solution.
- Recognize that you should provide guidance to peers in a timely manner. When giving guidance to peers be specific, and be constructive.
- Take the time to discuss non-work related issues. Let your peers know when they are doing a good job. Praise them for positive performance and explain why you viewed their performance as positive.
- After discussing a problem or issue with a co-worker, ask them for their perceptions of its cause and possible solutions. Make note of problems and solutions for future reference.
- Acknowledge the assistance of others by a personal "thank you" or, if the situation seems appropriate, write them a note or memo or call them directly to thank them.
- Act as a mentor or "buddy" for new employees, teaching them the "ropes".
- Assist in training and educating new employees when possible.