

# Customer Service Profile™

## Financial Services: Selection Report

### Sally Sample

CONFIDENTIAL

Assessment Taken: 09.28.2020 Printed: 11.11.2020

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# INTRODUCTION

Service to the customer is a part of the job for virtually every employee. Proficiency in providing this service is related to an individual's Behavioral Traits, basic Proficiencies, and their own perspective on providing customer service.

This report reflects the responses provided by Sally Sample when she completed the Customer Service Profile assessment. The information is presented in the following four parts:

- **Summary Graph** - a graphical representation of her scores on each scale of the Selection Report.
- **Behavioral Traits** - six behavioral traits that have demonstrated relevance to providing effective customer service are discussed in light of her scores on each of the scales.
- **Considerations for Interviewing** - on the scales where Ms. Sample scored outside of the Performance Model, suggestions for interviewing are provided to assist in the selection process.
- **Company Service Perspective** - the degree of alignment between the individual's perspective on providing service to the customer and that expressed by the company.

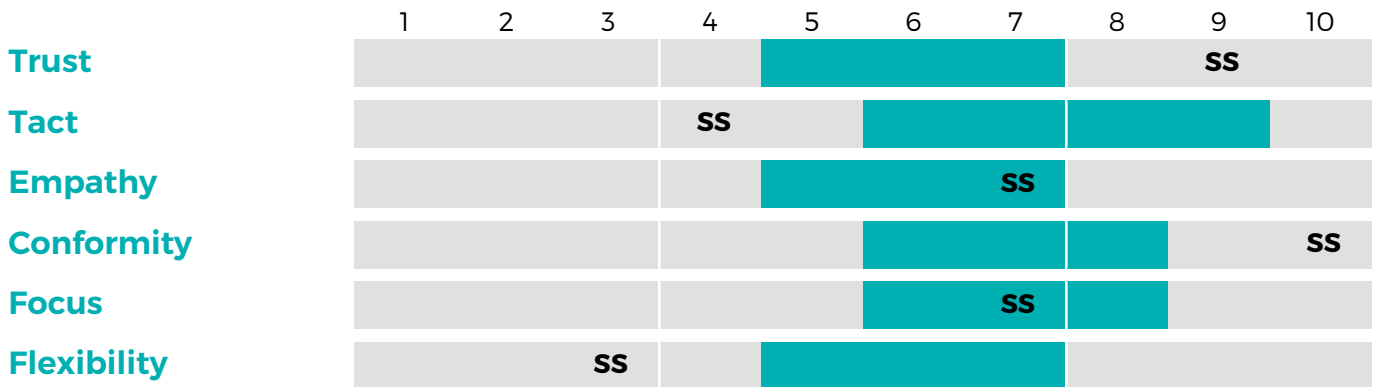
Please consult the User's Guide for additional information on using these results when working with Sally. As discussed in the User's Guide for this product, the results from this, or any, assessment should never make up more than a third of the final decision in placements.

# SUMMARY GRAPH

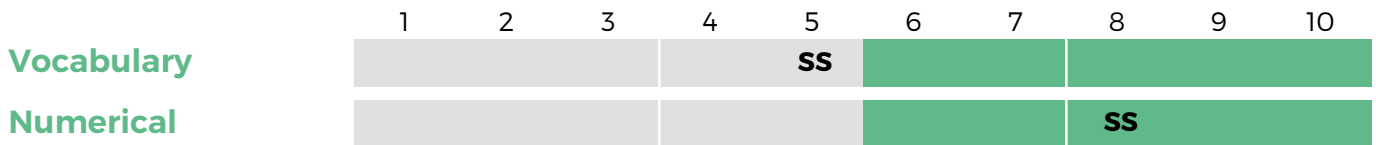
When viewing the scales on this page and the next, the darker shading represents the Job Performance Model for the role of Customer Service - Financial Services. The initials indicate the individual's score.

Distortion for this assessment is within the acceptable range.

## BEHAVIORAL TRAITS



## PROFICIENCIES



Sally Sample has an Overall Job Match of **65%** for the position of Customer Service - Financial Services

# BEHAVIORAL TRAITS

Six behavioral traits have demonstrated relevance to providing effective customer service. These characteristics are presented here with the scores for Ms. Sample. Behavioral Considerations for each scale relate to her actual scores. Note that the statements presented for each end of the scales help identify the extremes of the characteristic. The initials indicate where Sally scored and the comments below each scale reflect what might be expected of her.

## TRUST

Tendency to hold an unquestioning belief that the motives of others are honorable

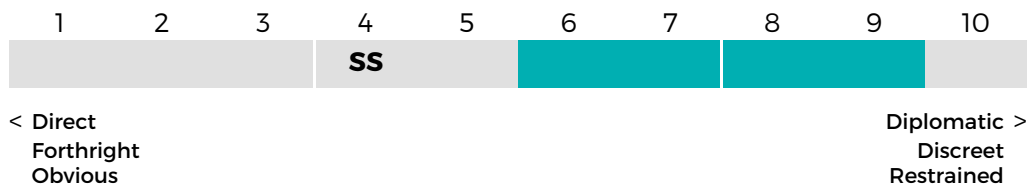


### Behavioral Considerations

Ms. Sample can be rather trusting at times. She genuinely wants to believe that what others say is true and authentic, possibly regardless of evidence to the contrary. She may not be suspicious of another person’s motives and she strongly feels that most people are honest.

## TACT

Tendency to state a position without unnecessarily offending others



### Behavioral Considerations

She can seem inconsiderate regarding the feelings of others as shown by her relatively low level of tact. This may be due to a number of different factors but, whatever the reasons, she may often comment in a less than tactful or diplomatic fashion. Alternatively, situations that call for a direct interpersonal style are suitable for Sally.

### EMPATHY

Tendency to understand another's situation and feelings

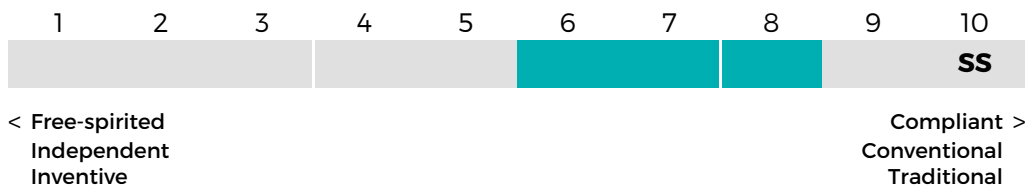


#### Behavioral Considerations

Ms. Sample generally finds it easy to be sympathetic, understanding and compassionate, to the point of allowing herself to become personally involved in solving the needs of customers. She has a strong need to be helpful to those with whom she has contact.

### CONFORMITY

Tendency to comply with the rules and those in authority

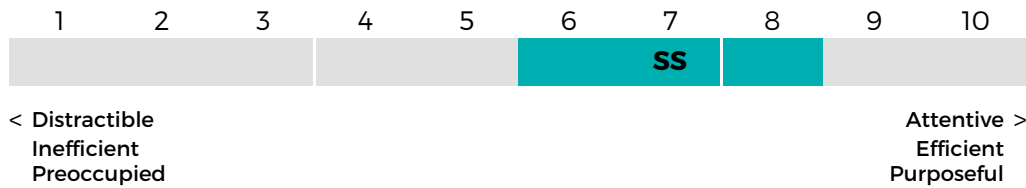


#### Behavioral Considerations

She generally believes in, and is obedient to, the norms of a group or organization. Sally is a strong believer in following the orders or instructions of those in authority. She is apparently one who will adhere to all known rules and regulations expected of employees in this position.

### FOCUS

Tendency to stay on target regardless of distractions



#### Behavioral Considerations

Sally demonstrates a relatively strong level of concentration when allowed the opportunity. Only an exceptionally distracting environment should cause her to stray from her focus. A change of priorities should not be too disrupting for her, if she is given the time to gather her faculties and head in the new direction.

### FLEXIBILITY

Tendency to explore new approaches to doing things



#### Behavioral Considerations

She indicates a preference for routine or repetitious tasks that remain unchanged over time. New ways of doing things are rather disconcerting for her and are probably avoided whenever possible. She may be most effective providing service to the customer if the rules and procedures are clearly defined.

# CONSIDERATIONS FOR INTERVIEWING

Ms. Sample scored outside the Performance Model in the areas listed below. Information and interview questions are provided to facilitate the selection process.

## TRUST

Tendency to hold an unquestioning belief that the motives of others are honorable



### Considerations For Interviewing

Ms. Sample has a score on the Trust Scale above the Performance Model for this position. The issue of interest is whether she is able to discern the motivations of others who may try to take advantage of her. Is too much trust in everyone's motivations a liability that she cannot overcome?

### Interview Questions

- Describe a recent situation in which you discovered that a customer was trying to take advantage of your good nature. Does this happen often?

*Interviewer's Notes*

- How do you feel about co-workers who think that most people are basically dishonest? Is there any truth to such an opinion?

*Interviewer's Notes*

## TACT

Tendency to state a position without unnecessarily offending others



### Considerations For Interviewing

With a relatively low result on the Tact scale, Ms. Sample scores outside of the Performance Model for this position. Her willingness to adjust her behavior through training should be determined. Since the score is in the lower mid-range, it is possible that only some adjustment is required. Her readiness for training may be determined by interview questions.

### Interview Questions

- When a customer requires a delicate touch, what methods do you usually employ? Would learning some new competencies be of interest to you?  
*Interviewer's Notes*
  
- Provide a recent example of your skill at dealing diplomatically with a customer. How do you feel about this kind of communication style, and what skills would you like to develop to improve in this area?  
*Interviewer's Notes*



## CONFORMITY

Tendency to comply with the rules and those in authority



### Considerations For Interviewing

Sally is highly motivated to conform to the traditions of an organization but her level of Conformity is higher than the Performance Model for this position. This implies that she may be overly challenged by opportunities to constructively make an exception to the rules. Questions could focus on whether she is overly rule-bound. A few typical questions may include:

### Interview Questions

- Describe a time when you deviated from the exact interpretation of a procedure to achieve success for the benefit of your team or an organization.  
*Interviewer's Notes*
  
- How do you feel about those who bend the rules or take a casual attitude about procedures?  
*Interviewer's Notes*

## FLEXIBILITY

Tendency to explore new approaches to doing things



### Considerations For Interviewing

Ms. Sample has a score on the Flexibility scale outside the Performance Model for this position. Questions in the interview may need to focus on her willingness or ability to be more or less adaptable in her approach to sticking to procedure. Her willingness to try a new approach may need to be discerned.

### Interview Questions

- Have you recently experienced the need to suggest a new way to do something at work? Tell me more about that experience.  
*Interviewer's Notes*
  
- Describe for me the importance of complying with procedures. What if a system seems obsolete or out-of-date? What should be done in that case?  
*Interviewer's Notes*

# COMPANY SERVICE PERSPECTIVE

Sally was presented with fifty (50) questions relating to providing service to the customer. The company provided their answers to these same questions and these were compared to the answers Sally provided. Those questions where Sally had a different response are shown below along with her answers.

Sally provided responses that aligned with those of the company at a rate of **60%**.

| Perspectives that conflict   | Her answers |
|--|-------------|
| As long as they obtain the answers they need, a customer will not care how many people they talk to.                         | Yes         |
| It is impossible to help some clients.   | Yes         |
| No client is more important than another; all should be treated equally.   | No          |
| I might neglect to inform clients of our products to avoid wasting their time.   | Yes         |
| When a client calls, I think it is their responsibility to have all relevant information available so my time is not wasted. | Yes         |
| It is important that a client feel as comfortable with me as they do with my coworkers.                                      | No          |
| Consumer trust is directly related to my knowledge of the products.  | No          |
| I would rather serve many different customers than spend extra time with only one.   | Yes         |
| Rather than listen to a client's problems, my job is to solve their financial needs.   | Yes         |
| Before getting down to business, it is important that I chat with my customers.  | No          |
| Professional standards govern good customer service.   | No          |
| Once served, I move on to help the next client.  | Yes         |
| It is sometimes necessary to withhold all the facts to keep a client happy.  | Yes         |
| Rather than having to go to my manager, clients expect me to be able to make a decision on the spot.                         | No          |
| To better meet a client's needs, I like to develop rapport with them.  | No          |

| Perspectives that conflict   | Her answers |
|--|-------------|
| Explaining to a client why he or she is wrong can often satisfy a client's true needs.               | Yes         |
| Clients that have been given substandard service will come back if your rates and benefits are good. | Yes         |
| If I don't know something, I shouldn't let my client realize that fact.                              | Yes         |
| I should let a customer chat if they want to.  | No          |
| It is important to talk to a client as long as possible.   | Yes         |