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AccuVision™ **CUSTOMER SERVICE SYSTEM**

From AlignMark

Group Report

For
XYZ Corporation
Alpha Unit

Date:

05-19-1993

AccuVision™ CUSTOMER SERVICE SYSTEM

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for
XYZ Corporation
Alpha Unit
May 19, 1999**

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AccuVision™ CUSTOMER SERVICE SYSTEM

SECTION I: SKILL RATINGS & RANKINGS

**Group Report
for
XYZ Corporation
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May 19, 1999**

<u>SKILL</u>	<u>Rank Order</u>	<u>Performance Level</u>
I. Customer Relations	1	Above average
II. Judgment	2	Average
III. Solicits New or Additional Business	3	Below average

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SECTION II: FREQUENCY TABLES

XYZ Corporation Alpha Unit

May 19, 1999

INCUMBENTS

SCORE	FREQUENCY	PERCENTAGE
0-250	5	8 %
260-500	10	17 %
510-750	30	50 %
760-990	15	25 %

APPLICANTS

SCORE	FREQUENCY	PERCENTAGE
3 out of 10 or less	38	6 %
4 out of 10	71	11 %
5 out of 10	87	13 %
6 out of 10	109	17 %
7 out of 10	102	16 %
8 out of 10	86	13 %
9 out of 10 or more	152	24 %

AccuVision™ CUSTOMER SERVICE SYSTEM

SECTION II: FREQUENCY TABLES

XYZ Corporation

Alpha Unit

May 19, 1999

Percentage of People Scoring Better than 65 % Of the People in the AccuVision™ Database

Skill	Percentage of People with an X at Performance Level
Customer Relations	66 %
Judgment	45 %
Solicits New or Additional Business	24 %

Percentage of People with Similar Skill Rankings

Skill	Ranking		
	1	2	3
Customer Relations	52 %	24%	24%
Judgment	34 %	38%	28%
Solicits New or Additional Business	14 %	41 %	45 %

The Following Pages Include:

**The Performance Development Strategies
For The Task Statements Where More Than
50% Of The Participants Needed Development**

AccuVision™ CUSTOMER SERVICE SYSTEM

SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

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.

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

AccuVision™ CUSTOMER SERVICE SYSTEM

SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

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

- A large number of policies and procedures affect our 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 other 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 at 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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AccuVision™ CUSTOMER SERVICE SYSTEM

SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

TASK: DECIDES WHEN TO INDEPENDENTLY MAKE DECISIONS VERSUS 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.
- From the customer's perspective, 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 take the actions necessary to resolve the problem.
- When you are required to take a decision to your supervisor or other individual for approval, discuss the factors the other individual considers 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 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 which 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 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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AccuVision™ CUSTOMER SERVICE SYSTEM

SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

TASK: **INTERACTS WITH PEERS TO OBTAIN OR PROVIDE HISTORICAL INFORMATION CONCERNING A CUSTOMER PROBLEM/ISSUE**

- Make sure that others view you as approachable. Encourage others to approach you for assistance or information.
- Make use of co-workers when trying to come up with solutions to customer problems. Group problem solving often yields better solutions than an individual could produce by working alone.
- Make a list of customer questions or objections that you have trouble handling. Discuss ways of handling the questions/ objections with more experienced co-workers.
- From time to time, you may be called on to handle a customer problem or complaint involving another employee. Take ownership for resolving the problem. Avoid placing blame on others or simply transferring the customer to the employee in question. If necessary, advise the employee of the outcome of the situation.
- Learn to recognize which types of customer requests are given priority status, and which types of requests are considered routine. Seek advice and input from experienced co-workers on which factors or issues make up a "priority" situation or request.
- Through conversations with others in your company, learn the general function of other departments. In this way, you will avoid directing customer calls to inappropriate departments.
- Ask questions in an open-ended manner. Questions such as, "Can you tell me more about how you handled the problem?" will enable you to gather more detailed information.

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AccuVision™ CUSTOMER SERVICE SYSTEM

SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

TASK: SOLICITS NEW/ADDITIONAL BUSINESS FROM CUSTOMERS

- Recognize that most direct contacts with a customer represent a sales opportunity. For the large majority of customers, the individual with whom they have the most contact is a customer service representative.
- Recognize that your sales activities directly benefit the customer. Encouraging customers to explore additional services and/or products can directly benefit the customer.
- Become familiar with how individual products and services can benefit different types of customers. To successfully influence a customer's purchase decision you must not only explain how a product/service works, but also how it will benefit the individual customer.
- Set specific goals for your sales activities. For example, set a daily goal for the number of customers with whom you'll explore sales opportunities.
- Keep a list of customers' most common reasons for electing not to purchase specific products/services. Discuss the list with our supervisor or more experienced personnel and find out how others successfully deal with similar situations.
- When discussing the benefits of a product/service with a customer, tailor your comments to the specific customer. Attempt to understand the needs of the particular customer by asking questions. Then tailor your comments in light of the information you've learned about the customer's needs and wants.

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SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

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 workstation. 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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AccuVision™ CUSTOMER SERVICE SYSTEM

SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

TASK: DETERMINES THE IMMEDIACY OF, AND SCHEDULES, WORK REQUESTS RECEIVED FROM CUSTOMERS

- Discuss with your supervisor any formal or informal guidelines concerning the scheduling of customers' work requests. Familiarize yourself with the "typical" procedures followed (i.e., typical time lines, methods of prioritizing, etc.) and your personal ability to make exceptions.
- Avoid asking customers for their preference on scheduling if you have only a limited ability to respond to their preference. For example, if you typically are only able to schedule a service call within 24 hours of receiving a customer's call, refrain from asking the customer when he/she would like the service call made. If the customer responds by saying "now", you have set up a situation that will only frustrate the customer when you are unable to meet his/her request.
- Learn to identify which work requests may constitute actual "emergencies" and should have scheduling priority, and which requests are routine and should be included on the regular schedule. Seek advice and input from supervisors or experienced co-workers on which factors or issues make up a "priority" situation.
- Most customers don't like to be told "no" (e.g., "we can't," "that won't be possible," etc.). Instead, try to avoid making harsh statements and instead, suggest alternatives. For example, "Unfortunately, it may not be possible to get that done by this afternoon; if necessary, could we schedule that for tomorrow?" sounds much better than simply telling the customer that his/her request can't be met.
- Look at the situation from the customer's perspective. What may appear to be a minor inconvenience or problem to you, may be a major issue or concern to the customer.
- If you are unable to comply with a customer's request for scheduling, 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 our inability to meet his/her request.

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AccuVision™ CUSTOMER SERVICE SYSTEM

SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

TASK: **EXPLAINS FEATURES AND BENEFITS OF GOODS/SERVICES TO CUSTOMERS OR PROSPECTIVE CUSTOMERS.**

- When discussing the benefits of a product/service with a customer, tailor your comments to the specific customer. Attempt to understand the needs of the particular customer by asking questions. Then tailor your comments in light of the information you've learned about the customer's needs and wants.
- Avoid simply making "speeches". Make your interactions with the customer a discussion. Encourage the customer to ask questions and check their understanding of your comments.
- Keep a list of customer's questions or objections that you find difficult to deal with during selling efforts. Discuss ways of handling the questions/objections from your supervisor or more experienced personnel.
- Avoid "technical" terms or assuming that the customer knows something about your product or its benefits. Make your comments simple and easy to understand.
- If you interact with customers in a face-to-face setting, make use of promotional materials during your interaction with customers. Visual aids will often help communicate your message better than words alone.
- When a customer appears receptive to purchasing a product/service, it is important to actually ask the customer for the purchase in polite and tactful manner. Even though a customer likes a product/service, some will not actually make the purchase without some form of prompting from you.

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