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AccuVision™ CUSTOMER SERVICE SYSTEM

From AlignMark

Interview Guide

For
John Doe
111-11-1111

Date:
03-18-1999

Interviewer's Name: _____

Summary comments/recommendations from interview:

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ORGANIZATIONALLY SPECIFIC QUESTIONS

In the space below, list any additional interview questions to be asked. These should include any questions needed to clarify information from the participant's resume/application, as well as questions specific to the position/organization. (Use the back of this page or insert additional pages if necessary.)

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SUGGESTIONS FOR CONDUCTING THE INTERVIEW

Before the session begins...

- Take the steps necessary to ensure that the session will not be interrupted. The participant should receive your undivided attention.
- Review the participant's application/resume to identify any background information that needs to be explored or clarified. List questions for these items, as well as any additional questions you intend to ask, on the sheet titled "ORGANIZATIONALLY SPECIFIC QUESTIONS."

Starting the session...

- Attempt to establish rapport and put the participant at ease.
- Explain the general purpose and format of the interview.
- Ask for and respond to any questions the participant may have.

Conducting the interview...

- Ask the interview questions and take notes on the participant's responses.

Closing the session...

- Indicate that all interview questions have been covered.
- Explain any relevant follow-up activities.
- Ask for and respond to any questions the participant may have.
- Thank the participant and close the session.

After the session...

- Evaluate the Organizationally Specific Questions and the AccuVision interview questions (including the oral and interpersonal areas). The following rating scale can be used for making these evaluations.

- 3 - More than acceptable
- 2 - Acceptable
- 1 - Less than acceptable

- Summarize the results of the interview in the space provided on the cover page.

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GENERAL QUESTIONS

QUESTION 1: Working as a customer service representative requires the employee to effectively deal with customers who have very different personalities and temperaments. What experiences have you had that demonstrate your skill in dealing with different types of people?

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Providing work, civic, or community-related examples of activities that reflect an ability to deal with different types of people in relatively formal settings.
2. Providing prior work experience that emphasizes dealing with the public.
3. Providing prior work experience that emphasizes customer service activities.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Providing no concrete examples or using examples that focus primarily on interactions with friends in social settings.

RATING FOR RESPONSE: _____

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GENERAL QUESTIONS

QUESTION 2: Employees occasionally have to deal with angry and verbally abusive customers. Assume an angry customer begins yelling at you about some problem she's having with your company. However, you are not personally responsible for the problem this customer is 'having. How would you deal with this customer?

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing and showing empathy for the customer's problem/situation, even though the employee was not the cause of the problem.
2. Allowing the customer to vent her frustrations in order to defuse the situation and attempting to calm her.
3. Questioning and getting the customer to focus on problem-solving actions.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to take ownership for the problem/situation (e.g., pointing out to the customer that the CSR is not responsible for the problem/situation, etc.).
2. Failing to empathize with the customer or permit her to vent her frustrations in order to defuse the situation (e.g., simply telling the customer to calm down or telling the customer that her behavior is inappropriate, etc.).
3. Making no attempt to focus the customer on resolving the problem/situation.

RATING FOR RESPONSE: _____

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GENERAL QUESTIONS

QUESTION: From time to time, we may receive requests from customers that are not in line with our standard policies or procedures. In some cases, we're able to make exceptions to our policies and procedures, but in other cases, we're just not able to do what the customer requests. If a customer asked you to do something that clearly could not be done, what would you say and do?

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for not being able to comply with the customer's request.
2. Exploring alternative actions that might address or partially address the customer's needs.
3. Explaining why the request cannot be met (i.e., why the policy exists and/or how it benefits the customer).
4. Taking actions that would leave the customer with a positive impression of the company (i.e., reiterating concern, apologizing for any inconvenience or problems caused by the inability to meet the request, etc.).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Referring the problem to the supervisor versus taking ownership of the situation.
2. Indicating that the customer would simply be told that "policy" does not allow the action to be taken.
3. Failing to indicate concern for the customer's feelings/perspective.
4. Failing to consider alternative actions that might address or partially address the customer's needs.

RATING FOR RESPONSE: _____

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GENERAL QUESTIONS

QUESTION: Assume the following: A new customer calls to arrange for service. After gathering some preliminary information, you explain to him that your company requires a deposit from all new customers. You know that the company will not allow exceptions to this policy. The customer becomes upset, and tells you he has an excellent credit record, he's never been late with a payment, and he has no intention of paying a deposit for service. He begins using harsh language, criticizing the company for the policy, and insulting you personally. How would you handle the situation and what would you tell the customer?

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Demonstrating an understanding of the customer's reason for being upset, and not wanting to pay the deposit.
2. Attempting to handle the call, rather than hanging up or transferring the call to someone else.
3. Attempting to explain the reasons behind the policy.
4. Initially allowing the customer to vent his anger.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Becoming irate and/or allowing the customer's behavior to interfere with his/her own rational behavior, language, or thinking (e.g., hanging up, using inappropriate language, avoiding the call, referring the call to another CSR or supervisor, telling the customer "I don't have to take this," etc.).
2. Responding in a way that might indicate the deposit will be waived.

RATING FOR RESPONSE: _____

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GENERAL QUESTIONS

QUESTION: Assume you've been asked to contact a customer who called earlier regarding a problem. When you contact the customer, she explains that she's one day late in making her payment, but doesn't want her payment recorded as a "late payment." She explains that she's applying for a loan, and doesn't want anything to damage her credit rating. She further states that this is the first time she's been late with a payment in the last five years, and asks you to waive the \$ 10 late fee. The computer system is down, so you can't check her payment history. Assuming you had the authority to do as the customer requested, what would you do and why?

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognizing that whether or not the payment is recorded as "late" is of little consequence to the company, compared with the importance of the customer maintaining a positive perception of the company, or the effort and expense of postponing the decision until the customer's payment history can be verified.
2. Demonstrating empathy for the customer's situation and an understanding of the customer's concern for a good credit rating.
3. Displaying a willingness to make the decision without the need to consult others.
4. Waiving the late fee.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Determining that recording the payment as "late" is worth the customer's poor perception of the company or the time and expense involved in making a decision at a later time.
2. Failing to demonstrate empathy for and understanding of the customer's situation and concerns.
3. Displaying a reluctance to make a decision based on own judgment, and/or deferring the decision to someone else (e.g., supervisor or another CSR).
4. Failing to waive the late fee, for any reason.

RATING FOR RESPONSE: _____

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GENERAL QUESTIONS

QUESTION: Assume the following: You're contacted by a customer who just signed up for a monthly service with your company. She just received her first statement and now she's questioning a \$12 charge labeled "service fee." When you explain that this is a regular monthly charge for that service, she tells you no one explained the fee to her when she signed up for the service. How would you handle this situation and why?

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Offering to waive the service fee on a one-time basis.
2. Explaining that in the future the customer will be charged a \$12 monthly service fee.
3. Recognizing that the customer will potentially have an on-going relationship with the company and that waiving the fee will create goodwill with the customer.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to waive this month's service fee.
2. Neglecting to remind the customer that beginning next month, she will be charged a \$12 service fee each month.
3. Failing to recognize that creating and maintaining a positive relationship with the customer is important for sustaining customer loyalty.

RATING FOR RESPONSE: _____

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GENERAL QUESTIONS

QUESTION: Assume you're a customer service representative whose company sells a particular product. Your company has a policy stating that if for any reason a customer is not fully satisfied with the product, he or she may return it within 30 days of purchase and receive a full refund. Assume a customer contacts you and states that he's disappointed with the product and wants a refund. You check the records and see that he purchased it over 3 months ago. You know that the only time the company will make exceptions to the refund policy is if the product is defective. In those cases, only the supervisor can approve the refund. What would you do and what would say to this customer?

NOTES:

(INTERVIEWER NOTE: If the participant says that he/she would ask the customer why he was unhappy with the product, ask the following question.) Suppose the customer says he wants the refund because he just hasn't had as much use for the product as he thought he would. What would you do in this situation?

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for the problem and for any inconvenience the customer may have experienced as a result of the problem.
2. Questioning the customer to find out why he is unhappy with the product.
3. Recognizing that the customer is asking for something that is clearly against policy and handling the situation without involving the supervisor.

4. Attempting to find a compromise solution that might address or partially address the customer's needs (e.g., offering a portion of the purchase price as a refund offering credit toward the next purchase, etc.).
5. Attempting to end the conversation on a positive note (e.g., apologizing for any inconvenience or problems caused by the inability to meet the request, showing empathy/concern).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to apologize for the problem and for the customer's inconvenience.
2. Failing to determine why the customer is unhappy with the product.
3. Demonstrating a reluctance to make the decision (e.g., proposing to contact the supervisor before making a decision, simply referring the problem to the supervisor).
4. Failing to take ownership for the situation (e.g., making comments such as, "If it were up to me I would, however or "I wish I could, but...").
5. Simply telling the customer nothing can be done because "it's against policy," and/or failing to consider alternative solutions that might address or partially address the customer's needs.

RATING FOR RESPONSE: _____

AccuVision™ CUSTOMER SERVICE SYSTEM

GENERAL QUESTIONS

QUESTION: Assume the following: It's a slow day at work and your supervisor asked you to spend the last hour of the day handling some delinquent accounts. You answer a call from a customer and he's obviously irritated. He tells you that he called your company two weeks ago requesting copies of his invoices from the last six months. He tells you the person he spoke with assured him he would receive the copies within a week; however, he still hasn't received them. He needs the invoices for a meeting he has first thing in the morning and says he's willing to pick them up. What would you do in this situation?

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Acknowledging that the customer was inconvenienced by the delay and apologizing for the inconvenience.
2. Displaying a willingness to change work schedule in order to accommodate the customer request.
3. Displaying a willingness to make the decision without the need to consult others.
4. Offering to take the information and have the invoices ready for the customer that day.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to acknowledge and/or apologize for the customer's inconvenience.
2. Explaining that he/she was busy and wouldn't be able to get to the customer's request that day.
3. Asking the supervisor for permission to handle the problem and/or deferring the problem to the supervisor for resolution.

RATING FOR RESPONSE: _____

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GENERAL QUESTIONS

QUESTION: Assume the following: A customer calls and tells you that because of some unusual circumstances, he's going to need some extra time to make his payment. Assuming you have the power to make the decision, what other kinds of information would you want to have before making a decision about his request?

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Checking the status of the customer's account (e.g., is his payment already overdue, does he have a history of late payments, etc.).
2. Asking the customer when he anticipates being able to make the payment.
3. Exploring possible alternatives (e.g., asking the customer if he can make a partial or token payment) to use until the customer is able to send the full payment.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to recognize the importance of checking the customer's account history.
2. Neglecting to ask the customer when he anticipates making the full payment.
3. Failing to suggest possible alternatives for dealing with the situation.

RATING FOR RESPONSE: _____

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GENERAL QUESTIONS

QUESTION: Assume the following has happened: You receive a call from a customer who tells you she hasn't been able to access the service she has through your company. She's very angry because the service outage has created a great deal of inconvenience and extra work for her. As the customer service person, you know the problem was caused by a power surge that damaged some equipment. You also know that repair personnel are currently working on the equipment and that the service should be operating within a couple of hours. What would you tell the customer?

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for the service interruption.
2. Demonstrating empathy and regard for the customer's situation, and an understanding that the customer was justifiably upset.
3. Explaining the cause of the service interruption.
4. Assuring the customer the problem is being corrected and service will be restored within a couple of hours.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Demonstrating a lack of concern or understanding of the customer's situation (e.g., how the service interruption affected the customer).
2. Failing to apologize for the service interruption.
3. Failing to adequately explain to the customer the reason for the service interruption, or when the service will be restored.
4. Stating to the customer that the service interruption is beyond the company's control, or that there is nothing the company could have done to prevent it.

RATING FOR RESPONSE: _____

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ORAL COMMUNICATIONS

No questions are asked for this area. Rather, the participant is evaluated based on behaviors observed during the overall interview session.

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. Expressed comments in a concise manner.
2. Enunciated clearly.
3. Spoke in a fluid manner.
4. Looked at interviewer when speaking.
5. Used gestures to emphasize points.
6. Expressed ideas in an easy to understand manner.
7. Used proper grammar.
8. Used voice inflection to emphasize points.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Rambled on or was overly wordy.
2. Had slurred speech.
3. Was overly hesitant or choppy when speaking.
4. Failed to maintain eye contact when speaking.
5. Expressed ideas in a manner that was difficult to follow and/or understand.
6. Made grammatical errors.
7. Spoke in a monotone and/or failed to use gestures.

RATING FOR RESPONSE: _____

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INTERPERSONAL

No questions are asked for this area. Rather, the participant is evaluated based on behaviors observed during the overall interview session.

NOTES:

SAMPLE EFFECTIVE BEHAVIORS:

1. At the start of the session, offered a polite and enthusiastic greeting.
2. As appropriate, used amenities such as "please" and "thank you."
3. Maintained a polite, courteous, and enthusiastic demeanor during the session.
4. Actively listened to the interviewer's comments (e.g., maintained eye contact while listening, nodding while listening, etc.).
5. At the close of the session, expressed appreciation for the interviewer's time and consideration.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Asked questions in an abrupt or curt manner.
2. Displayed little enthusiasm or politeness.

RATING FOR RESPONSE: _____