

# Comparability Form

## AccuVision Teller & Financial Services System

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The Teller & Financial Services System (TFS) is a process for measuring a participant's skills necessary to succeed in the financial services industry across a variety of positions. When information from the system will be used to make selection decisions, it is important to ensure that the test will provide valid information for the jobs in question. This form is designed to measure the similarity of the jobs you intend to use the test for relative to the jobs on which the test was originally validated. Given sufficient amount of similarity, the test will provide a valid measure of participants' financial services abilities and information from the test can be incorporated into selection decisions.

To assess the similarity of activities, it is suggested that a Comparability Form be completed. The form can be completed for an individual job title or an entire job family (i.e., a cluster of jobs that contains several different job titles, but where the activities performed are highly similar.) It should be completed using the following process.

- Assemble 2-3 individuals who are extremely familiar with the job for which the test is to be used.
- Have the group review and discuss the first activity on the Comparability Form. The discussion should center on whether or not the work activity on the form is actually performed in the job for which the test is to be used. If the answer is "yes", a check should be placed in the blank to the left of the statement. (If the group is comprised of only two people, both must agree on the tasks relevance for it to be checked. If the group is made up of more than two people, the majority of the group must agree on the tasks relevance.)
- Each statement on the form should be reviewed and processed in like manner.
- After all statements have been discussed and evaluated, tally the number of checked statements.
- If the number of checked statements is 14 or more, significant similarity exists between the jobs you intend to use the test for and the jobs on which the test was originally validated and therefore, the test will provide a valid measure of participants' financial services abilities.

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Names of group members	Titles
_____	
_____	
_____	

Job/job family for which evaluation is being made

Date

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- \_\_\_ 1. Deals with irate or angry customers.
- \_\_\_ 2. Maintains confidentiality of customer information.
- \_\_\_ 3. Initiates action on problems/requests, rather than simply referring same to supervisor/manager.
- \_\_\_ 4. Generates sound and logical solutions for dealing with problems or unexpected occurrences.
- \_\_\_ 5. Interacts with customers and others in a polite and courteous manner.
- \_\_\_ 6. Identifies services/products most suited to the expressed needs of customers/prospective customers.
- \_\_\_ 7. Presents the features and benefits of services/products to customers/prospective customers in order to influence their purchase decision.
- \_\_\_ 8. Reviews transaction items presented by customers to assure the items are acceptable for processing (e.g., signature matches name on account, numeric dollar amount matches written dollar amount, etc.)
- \_\_\_ 9. Determines which problems/issues should be handled by self, versus those that should be referred to supervisor/manager.
- \_\_\_ 10. Applies policies/procedures to the individual situations of customers.
- \_\_\_ 11. Reviews and scrutinizes own work (e.g., attends to detail, avoids “careless” mistakes/errors, etc.)
- \_\_\_ 12. Interacts with customers to resolve service/product complaints.
- \_\_\_ 13. Initiates action to dissuade customers from closing accounts, switching to a competitor, etc.
- \_\_\_ 14. Establishes priorities for own work activities when faced with competing work demands.
- \_\_\_ 15. Performs activities that require the application of basic mathematical skills (e.g., add checks to verify amount of total deposit, etc.)
- \_\_\_ 16. Explains policies and procedures to customers/prospective customers.

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- \_\_\_ 17. Makes decisions/recommendations concerning exceptions to standard procedures/policies (e.g., when to reduce/waive service charges assessed a customer, when to decrease hold period on an out-of state check for a particular customer, etc.)
- \_\_\_ 18. Identifies selling/cross selling opportunities when interacting with customers/prospective customers.
- \_\_\_ 19. Questions customers/prospective customers in order to accurately determine the products/services best fitted to their needs.
- \_\_\_ 20. Handles problems/tasks that are not own direct responsibility (e.g., refrains from taking a “not-my-job” posture; is proactive in dealing with problems or difficult customers, rather than simply passing them on to others; etc.).
- \_\_\_ 21. Interacts with coworkers to resolve operating or service problems.

Note: “Customer” does not refer only to individuals external to the organization. Also included are internal employees, persons in another unit/area, for whom such activities are performed.