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# AccuVision™ TELLER & FINANCIAL SERVICES SYSTEM

From AlignMark

**Group Report**

for

XYZ Corporation  
Alpha Unit

May 19, 1999

**AccuVision™ TELLER & FINANCIAL SERVICE SYSTEM**

**Group Report  
for**

**XYZ Corporation  
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**SECTION I: SKILL RATINGS & RANKINGS**

<u>SKILL</u>	<u>Rank Order</u>	<u>Performance Level</u>
<b>Judgment</b>	5	Average
<b>Customer Relations</b>	1	Average
<b>Solicits New or Additional Business</b>	6	Below average
<b>Identifies Customers' Dissatisfaction</b>	4	Average
<b>Attention to Detail</b>	2	Average
<b>Math Ability</b>	3	Average

n = 431

# AccuVision™ TELLER & FINANCIAL SERVICE SYSTEM

## SECTION II: FREQUENCY TABLES

### XYZ Corporation Alpha Unit

May 19, 1999

SCORE	FREQUENCY	PERCENTAGE
3 out of 10 or less	27	6.3 %
4 out of 10	60	13.9 %
5 out of 10	53	12.3 %
6 out of 10	73	17.2 %
7 out of 10	110	25.5 %
8 out of 10	92	21.4 %
9 out of 10 or more	15	3.5 %

291 applicant(s) or 67.5% out of a total of 431, scored at or above the cut off score of '6 out of 10.

## PERCENTAGE OF PEOPLE WITH SIMILAR SKILL RANKINGS

Skill	Ranking					
	1	2	3	4	5	6
Judgment	11.6 %	15.6 %	23.4 %	21.4 %	15.6 %	12.5 %
Customer Relations	39.4 %	15.6 %	11.4 %	12.3 %	10.0 %	11.4 %
Solicits New or Addtnl. Business	7.0 %	11.4 %	12.3 %	17.2 %	20.0 %	32.3 %
Identifies Customers' Disstisfctn.	10.9 %	16.9 %	18.3 %	18.6 %	23.4 %	11.8 %
Attention to Detail	19.3 %	22.0 %	17.4 %	14.6 %	17.4 %	9.3 %
Math Ability	18.1 %	15.8 %	16.9 %	15.3 %	14.6 %	19.3 %

## AccuVision™ TELLER & FINANCIAL 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

<b>Skill</b>	<b>Percentage of People with an X at Performance Level</b>
<b>Judgment</b>	<b>16.9 %</b>
<b>Customer Relations</b>	<b>51.3 %</b>
<b>Solicits New or Additional Business</b>	<b>13.5 %</b>
<b>Identifies Customers' Dissatisfaction</b>	<b>33.9 %</b>
<b>Attention to Detail</b>	<b>43.6 %</b>
<b>Math Ability</b>	<b>28.8 %</b>

**The Following Pages Include:**

**The Performance Development Strategies**

**For The Task Statements Where More Than**

**50% Of The Participants Needed Development**

# AccuVision™ TELLER & FINANCIAL SERVICES SYSTEM

## SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

### SKILL: SOLICITS NEW OR ADDITIONAL BUSINESS

#### TASK: **EXPLAINS FEATURES AND BENEFITS OF PRODUCTS/ SERVICES TO CUSTOMERS IN ORDER TO INFLUENCE THEIR PURCHASE DECISIONS**

- Provide information in a simple and easy to understand manner. Avoid "technical" terms that the customer may not clearly understand.
- 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 describing a long list of available products/services. Ask questions of the customer to determine potential needs and interests. Then discuss those products/services that appear best suited to the customer.
- Keep a list of customers' most common reasons for electing not to purchase specific products/services. Discuss the list with your supervisor or more experienced personnel and find out how others successfully deal with similar situations.
- As you explain products/services, make sure the customer fully understands the information discussed by encouraging him/her to ask questions.
- When a customer appears receptive to purchasing a product/service, it is important to actually ask for the purchase. This should be done in a polite and tactful manner, such as: "If you'd like, I'd be happy to open the account for you right now."

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

# AccuVision™ TELLER & FINANCIAL SERVICES SYSTEM

## SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES

### SKILL: SOLICITS NEW OR ADDITIONAL BUSINESS

#### TASK: QUESTIONS PROSPECTIVE CUSTOMERS TO DETERMINE THE PRODUCTS/SERVICES BEST SUITED TO THEIR NEEDS

- Avoid simply describing a long list of available products/services. Ask the customer questions to determine potential needs and interests. Then discuss those products/services that appear best suited to the customer.
- Learn to recognize the types of account information that indicate an opportunity to explore sales. For example, a savings account that has little activity can often be converted to a certificate of deposit. A checking account with a large daily balance can often be converted to some form of interest-bearing account.
- As you explain products/services, make sure the customer fully understands the information discussed by encouraging him/her to ask questions.
- In some instances, customer complaints provide a perfect opportunity to explore sales opportunities. For example, a customer who complains about waiting time may be unaware of options such as direct deposit services.
- When a customer expresses a desire to close an account, attempt to determine the reasons for such action. Retention of existing customers' business is as important as soliciting new or additional business.
- Most customers view their financial affairs as private and are not totally comfortable discussing them with others. Because of this, questions should be asked in a very tactful manner.

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