

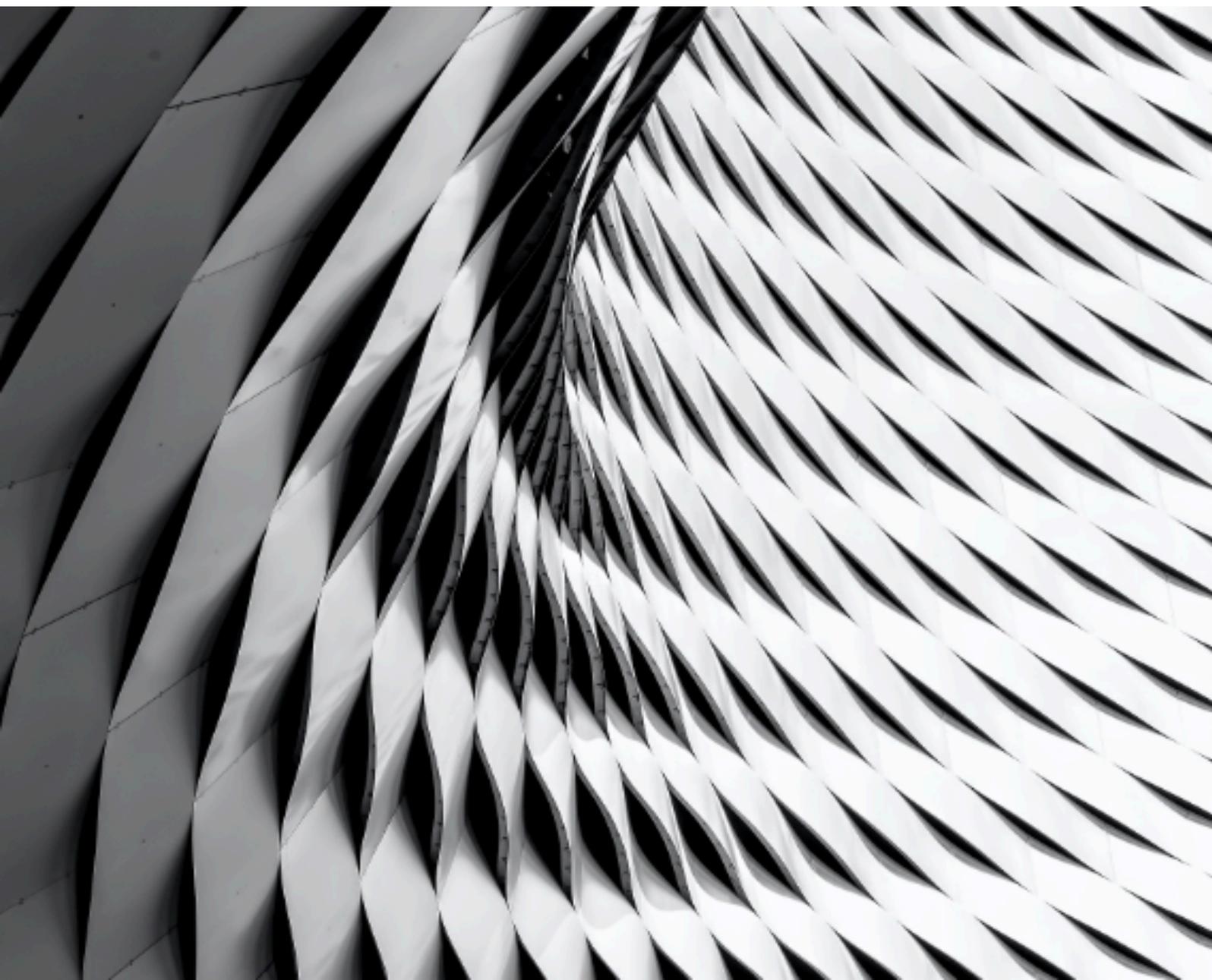


Customer Service (Retail)

A candidate report for:

Sam Sample

Created 15th October 2022



Introduction

This report is confidential and is intended to provide you with feedback on your results. The exercise is designed to assess areas of critical importance for success in the role of a Customer Service Advisor. The competencies assessed are defined below.

Customer Service Competencies

Communicating: Communicates clearly and convincingly with others, especially customers.

1. Listens carefully and with interest
2. Communicates in a way that is clear, precise, and relevant to the situation
3. Encourages two-way dialogue, inviting input and comments
4. Negotiates fluently and calmly with others, especially customers

Collaborating: Supports and encourages others in an effort to maximise team performance.

1. Supports others, in an effort to maximise performance
2. Engages with others through a clear sense of shared priorities
3. Encourages team input to jointly solve problems and resolve potential conflicts
4. Is collaborative within & across teams (i.e., contributes fully, being as inclusive as possible)

Understanding Customer Needs: Carefully builds an understanding of customer needs and priorities.

1. Builds an effective understanding of company products & services
2. Demonstrates ability to listen and respond sensitively to customers
3. Seeks pertinent information about customer' needs and priorities as needed
4. Shares relevant information about products & services with customers as needed

Showing Initiative: Takes ownership and action for tasks and situations where they have the authority to do so.

1. Organises own workload effectively, prioritising conflicting demands
2. Takes ownership of own work and responsibilities
3. Adopts a sense of urgency, working at an appropriate pace
4. Is proactive & flexible in management of tasks

Dealing with Challenge: Effectively manages challenging situations and difficult individuals.

1. Demonstrates ability to remain calm and positive, esp. under pressure
2. Effectively manages own performance/health (incl. coping strategies)
3. Deals effectively with challenging situations and/or individuals, especially customers
4. Copes effectively with ambiguity and pressure to deliver

How To Use This Report

This report provides you with feedback from the Customer Service (Retail). It contains 'behavioural interpretation' that you can use to help you understand how you have performed on the exercise and 'development opportunities' to inform your development priorities, should you wish to improve your skills in specific areas.

Behavioural Interpretation

For each competency, an interpretation (four bullet points) has been provided to help you better understand the decisions you made on the exercise. Not every bullet point may apply equally to you, but you should consider them all, at least initially, and then decide which are most relevant for you.

Development Opportunities

You have also been provided with some ideas to help improve the competencies. The suggestions are intended to support you in your career progression, so working through these suggestions and identifying your own ideas for improving your skills should help you create a relevant development plan. When creating your development plan, it is best to set SMART Goals:

- **S = Specific:** Clearly defined and unambiguous
- **M = Measurable:** Contains specific criteria that you can use to measure your progress and goal accomplishment
- **A = Achievable:** Attainable in the timeframe you have set yourself and not impossible to achieve
- **R = Relevant:** Relevant to your goal, career or what you want to achieve
- **T = Time-bound:** Has a clear start and end date

The SMART Template below can be used to help you set a development goal.

 S	<p>Specific</p> <ul style="list-style-type: none"> • What do I want to achieve? • When do I need to achieve it? • Why is the goal important? • Who is involved? 	
 M	<p>Measurable</p> <ul style="list-style-type: none"> • How will I measure my progress? • How will I know when my goal is achieved? • What will be different when I have completed my goal? 	
 A	<p>Achievable</p> <ul style="list-style-type: none"> • Can I complete my goal in the time I have available? • How confident am I that I can achieve my goal? • What support will I need to achieve my goal? 	
 R	<p>Relevant</p> <ul style="list-style-type: none"> • Why is this goal important to me? • How does this goal relate to my overall success? • What is especially meaningful about my goal? 	
 T	<p>Time-bound</p> <ul style="list-style-type: none"> • When will I be ready to start working on my goal? • What specific date will I complete my goal? • How often will I check the progress I am making on my goal? 	

Feedback

Collaborating

Your responses suggest that you:

- Engage swiftly and directly with colleagues to prioritise high quality customer service
- Approach colleagues to offer encouragement and support
- Engage with team members to persuade and build alignment
- Try to understand the context before giving a view

Development Opportunities

To develop your skills further in this area you might wish to consider:

- Role modelling offering direct support to colleagues when they are struggling
- Promoting the importance of listening to colleagues and having open conversations
- Building your understanding of why colleagues might disagree on particular issues
- Addressing challenging people situations in a constructive yet sensitive manner

Communicating

Your responses suggest that you:

- May not adapt style of delivery sufficiently to enable customers to understand key information
- May stick to providing the same type and amount of product information, rather than adapting the detail offered or giving the customer space to think
- May avoid personally dealing with more sensitive customer issues when under pressure
- Might try to avoid having to deal directly with frustrated or angry customers

Development Opportunities

To develop your skills further in this area you might wish to consider:

- Practising communicating key information to a colleague who has a very different communication style to your own
- Thinking about a time you did not fully understand the needs of a customer and considering what you could ask, say or do to improve for next time
- Considering how you respond to challenging customers when you are under pressure to complete tasks. What could you do differently?
- Identifying colleagues who are good at dealing with angry or frustrated colleagues. Asking them for suggestions and putting these into practise when there is an opportunity

Understanding Customer Needs

Your responses suggest that you:

- Might appear to lack confidence when you do not have the personal knowledge to fulfil a customer query
- May misread customers and make assumptions about the information or action they require
- Tend to leave decision making and action in the hands of more senior colleagues, even if you have identified a potential opportunity
- May struggle to adapt your response based on customer feedback

Development Opportunities

To develop your skills further in this area you might wish to consider:

- Understanding who to ask for further information and when it is appropriate to seek additional information on a customer's behalf
- Thinking about how to tell when someone has already made a clear decision and when it would be useful to ask more questions and suggest alternatives. What are the signs for each scenario? How could you respond differently in each case?
- Thinking about your business and seeing if you can identify any areas that could be improved. Try discussing the ideas you are most confident about with your colleagues or manager
- Finding a product or area of the business you are interested in but not familiar with. Learning about it and then explaining it to a friend or family member in an easily understood way

Showing Initiative

Your responses suggest that you:

- May wait for customers to approach you for help, rather than offering support proactively
- May need guidance on appropriate tasks to take on during quiet periods
- Could be wary of taking on new challenges, particularly when you lack experience
- Can be cautious in embracing new challenges

Development Opportunities

To develop your skills further in this area you might wish to consider:

- Considering opportunities you may have missed in the past and what caused you to not take them on at the time. Thinking about how you might approach those situations differently
- Writing a list of the things you could do during quieter periods at work. Discussing your ideas with colleagues
- Finding out about new opportunities and challenges you could take on at work and picking 1-2 to try
- Thinking about how you could improve customer service at your business. Sharing your ideas with your colleagues or manager

Dealing with Challenges

Your responses suggest that you:

- May lose composure when under pressure from customers, tending to make a 'black and white' decision
- Could become less professional in the level of customer service offered when under pressure to complete tasks
- May struggle to prioritise when balancing multiple customer requests
- Might avoid personally dealing with confrontation or inappropriate customer behaviours

Development Opportunities

To develop your skills further in this area you might wish to consider:

- Asking colleagues for advice and practical tips on how to explain company policies to challenging customers
- Thinking about when you feel most under pressure at work. What could you do to make sure you prioritise the most important things and feel in control?
- Putting yourself in the shoes of customers and asking yourself how you would like to be treated. Remembering this particularly when you are at your busiest
- Practising how you might deal with challenging customer situations, perhaps asking a colleague for help and feedback. Next time you see a difficult situation, step in to deal with it yourself