

A blue rounded rectangular logo with a white border and a white-to-blue gradient background. The letters "CSP" are written in white, sans-serif font in the upper left corner.

Report designed for

**Sally Sample**

# Customer Service Profile™

## Coaching Report

Performance Model: Customer Service Representative (CSR)

Performance Model Date: 09/11/2013

Assessment Taken: 03/25/2010 Printed: 09/11/2013

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## Introduction

Service to the customer is a part of the job for virtually every employee. Proficiency in providing this service is related to an individual's Behavioral Traits, basic Proficiencies, and their own perspective on providing customer service.

This report reflects the responses provided by Sally Sample when she completed the Customer Service Profile assessment. The information is presented in the following four parts:

- **Summary Graph** - a graphical representation of her scores on each scale of the Selection Report.
- **Behavioral Traits** - six behavioral traits that have demonstrated relevance to providing effective customer service are discussed in light of her scores on each of the scales.
- **Management Considerations** - on the scales where Ms. Sample scored outside of the Performance Model, suggestions are provided to assist in her development.
- **Company Service Perspective** - the degree of alignment between the individual's perspective on providing service to the customer and that expressed by the company.

Please consult the User's Guide for additional information on using these results when working with Sally. As discussed in the User's Guide for this product, the results from this, or any assessment should never make up more than a third of the final decision in placements.

## Summary Graph

When viewing the scales on this page and the next, the darker shading represents the Performance Model for the role of Customer Service Representative (CSR). The larger box indicates the individual's score.

**Trust**



**Tact**



**Empathy**



**Conformity**



**Focus**



**Flexibility**



### Behavioral Traits

Distortion for this assessment is within the acceptable range.

**Vocabulary**



**Numerical**



### Proficiencies

Sally Sample has an Overall Job Match of **71%** for the position of Customer Service Representative (CSR)

## Behavioral Traits

Six behavioral traits have demonstrated relevance to providing effective customer service. These characteristics are presented here with the scores for Ms. Sample. Behavioral Considerations for each scale relate to her actual scores. Note that the statements presented for each end of the scales help identify the extremes of the characteristic. The larger box indicates where Sally scored and the comments below each scale reflect what might be expected of her.

**Trust** - Tendency to hold an unquestioning belief that the motives of others are honorable



*Skeptical  
Vigilant  
Wary*

*Optimistic  
Uncritical  
Unquestioning*

### Behavioral Considerations

Ms. Sample can be rather trusting at times. She genuinely wants to believe that what others say is true and authentic, possibly regardless of evidence to the contrary. She may not be suspicious of another person's motives and she strongly feels that most people are honest.

**Tact** - Tendency to state a position without unnecessarily offending others



*Direct*                      *Diplomatic*  
*Forthright*                *Discreet*  
*Obvious*                    *Restrained*

**Behavioral Considerations**

She can seem inconsiderate regarding the feelings of others as shown by her relatively low level of tact. This may be due to a number of different factors but, whatever the reasons, she may often comment in a less than tactful or diplomatic fashion. Alternatively, situations that call for a direct interpersonal style are suitable for Sally.

**Empathy** - Tendency to understand another's situation and feelings



*Detached  
Distant  
Indifferent*

*Compassionate  
Sensitive  
Understanding*

**Behavioral Considerations**

Ms. Sample generally finds it easy to be sympathetic, understanding and compassionate, to the point of allowing herself to become personally involved in solving the needs of customers. She has a strong need to be helpful to those with whom she has contact.

**Conformity** - Tendency to comply with the rules and those in authority



*Free-spirited  
Independent  
Inventive*

*Compliant  
Conventional  
Traditional*

**Behavioral Considerations**

She generally believes in, and is obedient to, the norms of a group or organization. Sally is a strong believer in following the orders or instructions of those in authority. She is apparently one who will adhere to all known rules and regulations expected of employees in this position.

**Focus** - Tendency to stay on target regardless of distractions



*Distractible*  
*Inefficient*  
*Preoccupied*

*Attentive*  
*Efficient*  
*Purposeful*

**Behavioral Considerations**

Sally demonstrates a relatively strong level of concentration when allowed the opportunity. Only an exceptionally distracting environment should cause her to stray from her focus. A change of priorities should not be too disrupting for her, if she is given the time to gather her faculties and head in the new direction.



**Flexibility** - Tendency to explore new approaches to doing things



*Cautious*  
*Inflexible*  
*Uncompromising*

*Accepting*  
*Adaptable*  
*Enjoys new approaches*

**Behavioral Considerations**

She indicates a preference for routine or repetitious tasks that remain unchanged over time. New ways of doing things are rather disconcerting for her and are probably avoided whenever possible. She may be most effective providing service to the customer if the rules and procedures are clearly defined.

## Management Considerations

Ms. Sample scored outside the Performance Model in the areas listed below. Management Considerations are provided to facilitate working with her.

**Trust** - Tendency to hold an unquestioning belief that the motives of others are honorable



### Management Considerations

Ms. Sample demonstrates such a high level of trust in the motivations of others that she may be seen as quite naïve to some customers. To avoid being taken advantage of, she may benefit from training that highlights how to deal with a manipulative customer. Additionally, if lack of experience in this position is an issue, she could learn from more real-world incidents over time.

**Tact** - Tendency to state a position without unnecessarily offending others



### Management Considerations

Assertiveness training that emphasizes diplomacy and etiquette may help to improve what appears to be a low level of tactfulness in Ms. Sample. While probably aware of the basic fundamentals of appropriate social skills, her motivation to put these skills in practice may be the relevant case here. The mentorship of a respected co-worker who has accomplished this skill set may be of the most use for her.

**Conformity** - Tendency to comply with the rules and those in authority

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**Management Considerations**

Ms. Sample is very dependent upon familiar procedures to achieve her work. Creativity and adaptability may need to be encouraged so that she does not work in an unnecessarily repetitive fashion and can adapt to unforeseen situations that she may encounter. Her sense of conformity may actually be helpful for encouraging her assimilation into the broadminded norms of her work group.

**Flexibility** - Tendency to explore new approaches to doing things

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**Management Considerations**

Due to a relatively low appreciation for change, it may be helpful to clearly schedule any changes that may occur to the procedures with which she is familiar. Taking change one step at a time may encourage greater investment in new methods and procedures.

## Company Service Perspective

Sally was presented with fifty (50) questions relating to providing service to the customer. The company provided their answers to these same questions and these were compared to the answers Sally provided. Those questions where Sally had a different response are shown below along with her answers.

Sally provided responses that aligned with those of the company at a rate of **46%**.

Perspectives that conflict	Her Answers
<b>Certain technical questions should be referred to an internal expert or supervisor.</b>	No
<b>Customers don't care how many people they have to talk to as long as they get the answers they need.</b>	Yes
<b>Customers don't care whether I refer to them by name, as long as they receive good service.</b>	Yes
<b>Customers expect me to be friendly no matter how busy I am.</b>	No
<b>I should follow up with customers to see that they are satisfied with the service I gave them.</b>	No
<b>I can't solve all of a customer's problems; some concerns have to be referred to others or left alone.</b>	No
<b>If a customer wants to chat, I should let them.</b>	No
<b>If I hear a customer speaking badly about our business, I should defend the company.</b>	No
<b>If our product is high quality, customers will come back even if my service is below average.</b>	Yes
<b>I should wait until several people complain about a problem before trying to correct its cause.</b>	Yes
<b>I should give customers what they ask for even if I don't think it will be right for them in the long run.</b>	Yes
<b>It is often possible to satisfy a customer by explaining why he or she is wrong.</b>	No
<b>It isn't necessary to suggest complementary services or products; customers know what they want when they contact us.</b>	Yes
<b>Departmental policies are less important than what I think is best for the customer.</b>	Yes
<b>Once I have a customer's requests fulfilled, I immediately help the next customer waiting.</b>	No
<b>Some customers simply cannot be satisfied.</b>	No
<b>Sometimes I hesitate to let customers know about other products and services since their time is valuable and shouldn't be wasted.</b>	Yes
<b>The more I know about our products and services, the more my customers will trust me.</b>	No
<b>There are times when I should have a supervisor speak to the customer.</b>	No

<b>Perspectives that conflict</b>	<b>Her Answers</b>
<b>When a customer asks to speak to the supervisor, the customer relationship can't be salvaged.</b>	Yes
<b>When a customer tells me that I am wrong, I should defend my opinion.</b>	Yes
<b>When calling my supervisor for help, I don't need to let the customer know what's going on.</b>	Yes
<b>If a conversation with a customer is going too long, I should find the most expedient way to break free; others need my attention too.</b>	No
<b>If my supervisor helps me with a customer, I should discuss how the customer was handled so I can learn from the situation.</b>	No
<b>Once their initial request is handled, I should ask the customer if there's anything else I can do.</b>	No
<b>With customers who can't be satisfied by my service, there's no point in finding someone else to address their needs.</b>	Yes
<b>Solving a customer's problem in a professional manner should be more important than sympathizing with their personal situation.</b>	No