Customer Service Perspective™

S A M P L E

Confidential Coaching Report

for

Susie Sample

Account Manager

Tuesday, June 10, 2003

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Pattern Date: 6/4/2003 2:08:09 PM

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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 Characteristics, basic Proficiencies and their own perspective on providing customer service.

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

- **Behavioral Characteristics**— eight behavioral characteristics that are important factors for success in providing service to customers.

- **Proficiencies**— a view of basic proficiency in mathematics and vocabulary.

- **Company Service Perspective**— the degree of alignment between the individual's perspective on providing service to the customer and that expressed by the company.

- **Considerations for Employee Development**—on the scales where Ms. Sample scored outside of the Job Match Pattern, suggestions are provided to assist in her development.

Please consult the User's Guide for additional information on using these results in working with Susie.

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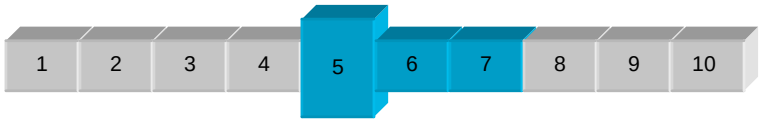
Customer Service Perspective

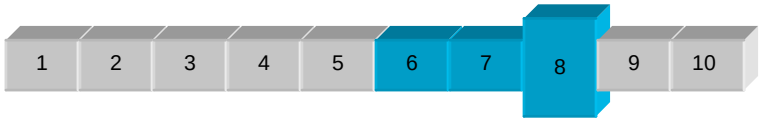
Summary of Behavioral Characteristics

The darker shading represents the Job Match Pattern for the role of Account Manager. The larger box indicates her score.

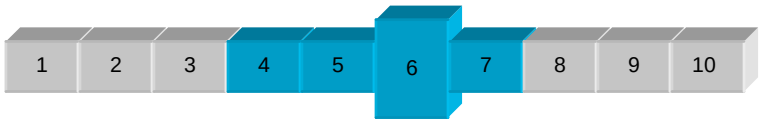
Trust – Tendency to hold an unquestioning belief that the motives of others are honorable



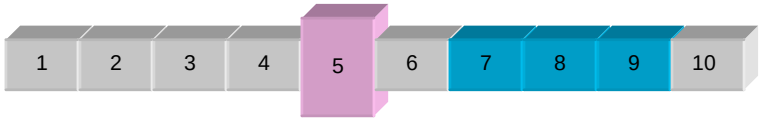
Tact – Tendency to state a position without unnecessarily offending others



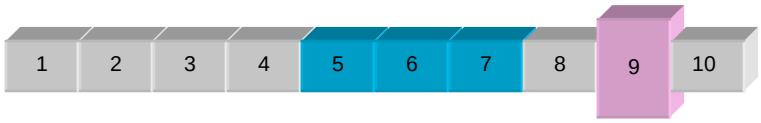
Empathy – Tendency to understand another's situation and feelings



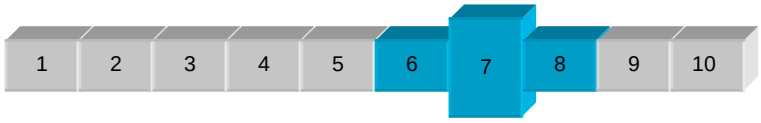
Conscientiousness – Tendency to be very accurate in work efforts; to keep promises



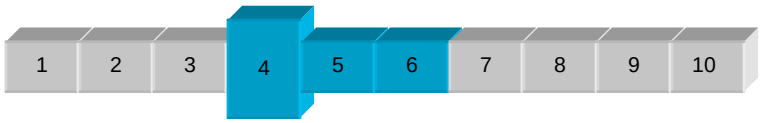
Conformity – Tendency to comply with the rules and those in authority



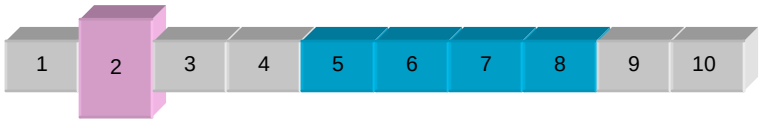
Focus – Tendency to stay on target regardless of distractions



Courtesy – Tendency to deal with others in a pleasant manner



Flexibility – Tendency to explore new approaches to doing things



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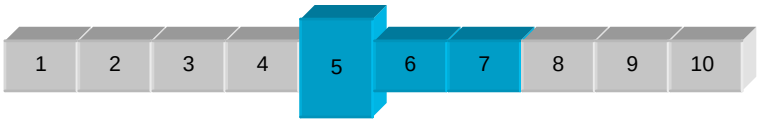
Behavioral Characteristics

Trust

- **Wary**
- **Vigilant**
- **Skeptical**



- **Unquestioning**
- **Uncritical**
- **Optimistic**

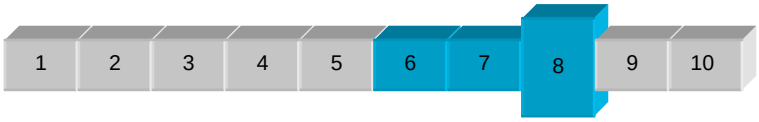
Pattern 5-7 Score 5

Comments on Trust

Ms. Sample probably wants to believe that most customers are quite trustworthy. She may feel that it is hard to trust customers without proof but she should be willing to give them the benefit of the doubt unless there are strong reasons for not doing so. In general her attitude is one of hesitant but yielding trust.

Tact

- **Direct**
- **Obvious**
- **Forthright**



- **Discrete**
- **Diplomatic**
- **Restrained**

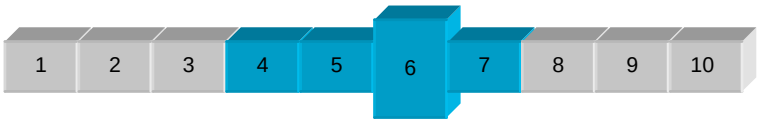
Pattern 6-8 Score 8

Comments on Tact

She apparently tries to be quite careful with her use of diplomatic language when serving the needs of customers. She almost certainly thinks about how her remarks may be interpreted. She is likely to be concerned that she be regarded as a tactful and considerate individual.

Empathy

- **Detached**
- **Indifferent**
- **Distant**



- **Understanding**
- **Compassionate**
- **Sensitive**

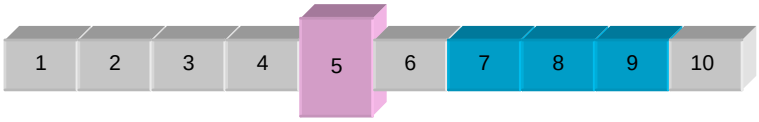
Pattern 4-7 Score 6

Comments on Empathy

Occasionally, Ms. Sample may be sympathetic to a customer's needs but prefers to avoid becoming deeply involved. She demonstrates a need to be considered compassionate and kind. However, she may resist the temptation to publicly demonstrate sympathy.

Conscientiousness

- **Imprecise**
- **Casual Attitude**
- **Lackadaisical**



- **Meticulous**
- **Particular**
- **Accountable**

Pattern 7-9 Score 5

Comments on Conscientiousness

Susie may approach making promises somewhat cautiously or hesitantly. When addressing customer needs, she may not always obligate herself due to consequences that are deemed too time-consuming or unachievable. She will, however, be likely to make an attempt to fulfill an obligation once it is made.

Behavioral Characteristics (con't)

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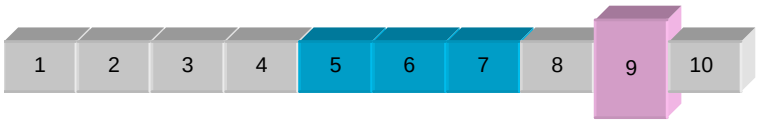
Customer Service Perspective

Conformity

- **Inventive**
- **Free-spirited**
- **Independent**



- **Traditional**
- **Compliant**
- **Conventional**

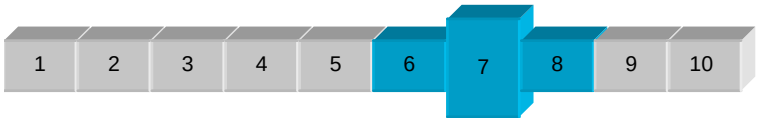
Pattern 5-7 Score 9

Comments on Conformity

She generally accepts the norms of a group or organization and will usually follow the orders or instructions of those in authority. She is apparently one who will adhere to all known rules and regulations expected of employees.

Focus

- **Distractible**
- **Preoccupied**
- **Inefficient**



- **Attentive**
- **Purposeful**
- **Efficient**

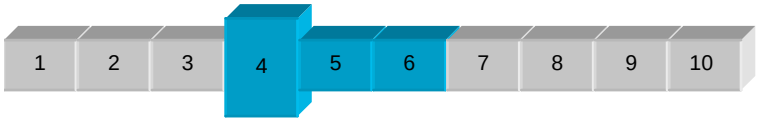
Pattern 6-8 Score 7

Comments on Focus

Susie demonstrates a relatively strong level of concentration when allowed the opportunity. Only an exceptionally distracting environment should cause her to stray from her focus. The advantage here is that her focus is not so strong as to be completely inflexible. So 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.

Courtesy

- **Forward**
- **Brash**
- **Impolite**



- **Polite**
- **Civil**
- **Well-mannered**

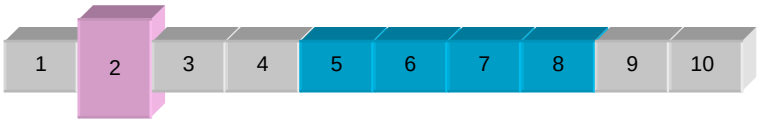
Pattern 4-6 Score 4

Comments on Courtesy

Susie may not appear especially courteous toward customers whom she perceives as “intolerable.” She appears to have a tendency to be rather insensitive and may be reluctant to go out of her way to be friendly or courteous, especially to customers with whom she is unfamiliar. She may be happy in a job with little direct customer contact.

Flexibility

- **Uncompromising**
- **Inflexible**
- **Cautious**



- **Adaptable**
- **Accepting**
- **Enjoys new approaches**

Pattern 5-8 Score 2

Comments on Flexibility

She does not appear to be interested in anything that has not already been learned or encountered in previous experiences. She probably does not normally seek out new ways of doing things or challenges to her way of thinking.

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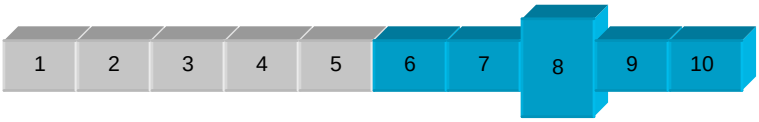
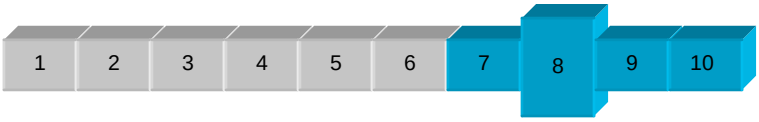
Proficiencies

The darker shading represents the Job Match Pattern for the role of Account Manager. The larger box indicates this individual's score.

Vocabulary – Understanding the meaning of words when used in sentences



Numerical – Understanding basic mathematical concepts and working with numerical problems



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Company Service Perspective

Forty-nine (49) questions related to providing service to the customer were presented to Susie. The responses to these questions suggest her perspective of providing customer service. The answers provided by the company represent their perspective and are compared to the answers provided by Susie. **The score indicates the percent of agreement between her responses and the answers provided by the company**.

Percentage of Agreement **86%**

In review of both the company perspective for providing good customer service and the view of Ms. Sample as expressed in her responses, **the following perspectives are in conflict. Some may represent issues that require your attention.**

PERSPECTIVES THAT CONFLICT	HER ANSWER
I think that it is important to chat with my customers for a few minutes before getting down to business.	No
Certain technical questions should be referred to an internal expert or supervisor.	No
One of the ways we offer strong service is to help in ways customers didn't necessarily request.	No
If a customer seems to have trouble understanding what I am saying, I will try to get someone else to explain it to them.	No
In order to keep customers happy, sometimes you need to say something that isn't entirely true.	Yes
It is often possible to satisfy a customer by explaining why he or she is wrong.	No
Customers don't like to be asked a lot of questions.	Yes

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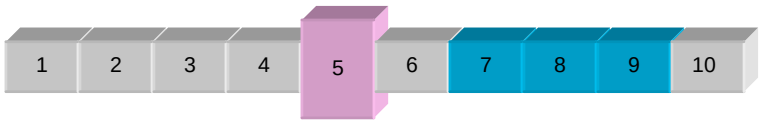
Considerations for Employee Development

The darker shading represents the Job Match Pattern for the role of Account Manager. Ms. Sample scored outside the Job Match Pattern in the areas listed below. Information and coaching comments are provided to facilitate working with her.

Conscientiousness – Tendency to be very accurate in work efforts; to keep promises

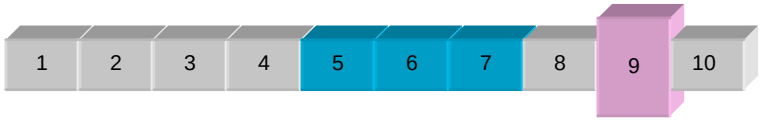


Pattern 7-9 Score 5

Considerations for Employee Development

Susie demonstrates a level of thoroughness in what she undertakes that is not too careless but leaves room for some improvement. An emphasis on consistently standing behind what she offers to do for customers or on making realistic offers to others is likely to be needed.

Conformity – Tendency to comply with the rules and those in authority

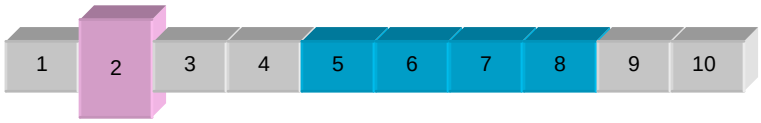


Pattern 5-7 Score 9

Considerations for Employee Development

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



Pattern 5-8 Score 2

Considerations for Employee Development

Considering her low score on the Flexibility scale, it may appear difficult to encourage change and development in much of her training, due to a natural wariness of unfamiliar methods and procedures. Progressing in small steps with ample time to relate to the reasons behind change may help in all of her training.

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