



CRITICAL^{*path*} CONSULTING
management strategies that *work*

Customer Service Screen

Prepared for:

demo sample

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San Jose, California
Voice: 408.893.4032
Fax: 408.448.1828
E-Mail: melinda@criticalpathconsulting.com
Web: <http://www.criticalpathconsulting.com>

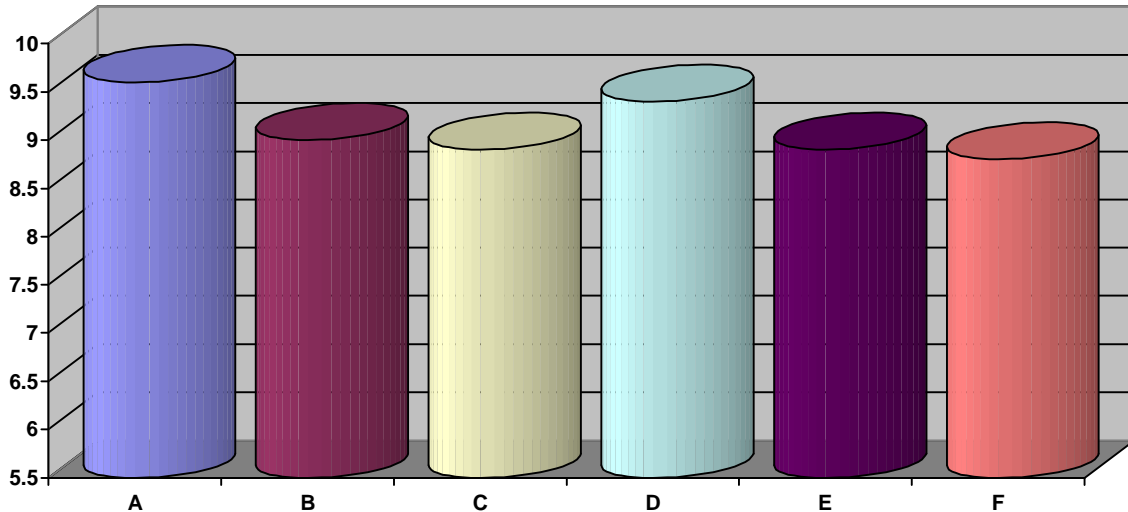
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Customer Service Screen

GLOBAL GRAPH



Low Risk (Excellent ability to utilize the capacity and translate the talent into decisions; reduces the potential for errors and mistakes)	8.8 to 10.0
Situational Risk (Very good ability to utilize the capacity especially in well defined areas; however, there are specific situations that can interfere with the translation into decisions)	8.5 to 8.79
Conditional Risk (Limited access to the capacity indicating actual conditions that will increase the potential for mistakes and errors and restrict the transfer into decisions)	8.2 to 8.49
Real Risk (Restricted access to the capacity indicating the ability is consistently unavailable and individuals are subject to mistakes and errors in judgment)	6.0 to 8.19

A) Relating With Customers (Low Risk) — The ability to see, understand and relate with customers in an objective, unbiased manner.
B) Communicating With Customers (Low Risk) — The ability to listen to customers, evaluate what is important and respond effectively.
C) Handling Customer Rejection (Low Risk) — The ability to maintain a strong sense of inner self worth regardless of circumstances.
D) Job Related Attitudes (Low Risk) — The ability to work within the organizational guidelines, policies and procedures to get things done.
E) Problem Solving Capacity (Low Risk) — The ability to identify potential customer problems and generate effective solutions.
F) Personal Work Attitudes (Low Risk) — The ability to feel a sense of purpose and satisfaction in one's work.

**Customer Service Screen
SYNOPSIS**

CAPACITY	LOW RISK	SITUATIONAL RISK	CONDITIONAL RISK	REAL RISK
RELATING WITH CUSTOMERS				
Attitude Toward Customers	ü			
Prejudice/Bias Index	ü			
Reading Customer Needs	ü			
Valuing Future Business	ü			
Patience With Customers	ü			
COMMUNICATING WITH CUSTOMERS				
Listening To Customers	ü			
Evaluating What Is Said		ü		
Developing A Response		ü		
Talking At The Right Time	ü			
Understanding Attitudes	ü			
HANDLING CUSTOMER REJECTION				
Self Esteem		ü		
Self Assessment		ü		
Self Confidence	ü			
Self Control	ü			
Sensitivity To Others		ü		

**Customer Service Screen
SYNOPSIS**

CAPACITY	LOW RISK	SITUATIONAL RISK	CONDITIONAL RISK	REAL RISK
JOB RELATED ATTITUDES				
Meeting Established Standards	ü			
Doing Things Right	ü			
Attention to Policies		ü		
Meeting Deadlines		ü		
Attitude Toward Authority	ü			
PROBLEM SOLVING CAPACITY				
Evaluating What To Do		ü		
Attention To Concrete Detail				ü
Using Common Sense	ü			
Intuitive Insight	ü			
Seeing Potential Problems	ü			
PERSONAL WORK ATTITUDES				
Job Satisfaction				ü
Flexibility/Adaptability	ü			
Health-Tension Index	ü			
Persistence	ü			
Consistency/Reliability				ü

Customer Service Screen

CORE STRENGTHS

Attitude Toward Customers: (Relating With Customers) SR-1A

Low Risk

They have a very dynamic, optimistic attitude toward others, can see and understand the positive potential of others, are concerned about and attentive to and available to others.

Prejudice-Bias Index: (Relating With Customers) SR-2B

Low Risk

They have the ability to see and understand the uniqueness and individuality of others but tend to be more open to viewpoints which match their expectations and ideals.

Reading Customer Needs : (Relating With Customers) SR-3A

Low Risk

They have very keen insight into others, the ability to evaluate their potential for good and bad, and to be aware of the needs and concerns of others.

Valuing Future Business: (Relating With Customers) SR-4B

Low Risk

They have the ability to build a plan or strategy which not only defines the boundaries for future decisions but also fits the pieces together to anticipate consequences of decisions.

Patience With Customers: (Relating With Customers) SR-5A

Low Risk

They have the ability and the willingness to be open and available to others, to see and accept the viewpoints of others and to be patient with others.

Listening To Others: (Communicating With Customers) SR-6B

Low Risk

They have the ability and willingness to listen to what others are saying, to pay attention to their own unique viewpoints, to their needs and concerns.

Talking At The Right Time: (Communicating With Customers) SR-9B

Low Risk

They have the ability to correctly and immediately identify both what is the correct or appropriate response and when the time is right to make their point.

Customer Service Screen CORE STRENGTHS

Understands Attitudes: (Communicating With Customers) SR-10A

Low Risk

They have the ability not only to see and understand the attitudes of others but they are also extremely concerned about meeting the needs and interests of others.

Self Confidence: (Handling Customer Rejection) SR-13C

Low Risk

Even though they are currently feeling uncertain and extremely frustrated in their current social\role environment, they can use this opportunity to identify new opportunities.

Self Control: (Handling Customer Rejection) SR-14

Low Risk

They have the capacity to maintain their sense of balance and equilibrium when dealing with stressful and emotional situations, responding rationally and objectively.

Meeting Established Standards: (Job Related Attitudes) SR-16B

Low Risk

They have a keen appreciation of standards and norms as well as a willingness to make certain that strategies, standards and expectations are met.

Doing Things Right: (Job Related Attitudes) SR-17B

Low Risk

Their insistence on doing things according to standards builds a desire and willingness to spend time and energy developing respect for standards and ways of getting things done.

Attitude Toward Authority: (Job Related Attitudes) SRV-20B

Low Risk

Their dogmatic insistence that things must happen according to a preset order and structure can lead them to an insistence on authority and conformity regardless of consequences.

Using Common Sense: (Problem Solving Capacity) SR-2 A

Low Risk

Their unconventional and individualistic thinking can create unique, novel ways of getting things done and build a drive to do things their own way.

Customer Service Screen

CORE STRENGTHS

Intuitive Insight: (Problem Solving Capacity) SR-24

Low Risk

They have a well developed ability to rely on intuitive insights to decide both where the problems are as well as what solutions are best.

Seeing Potential Problems: (Problem Solving Capacity) SR-25

Low Risk

They have a good capacity for identifying what the crucial issues are in complex and confusing situations and how these issues are integrated into the overall problem situation.

Flexibility, Adaptability: (Personal Work Attitudes) SR-27A

Low Risk

They have a strong personal commitment to what they believe is right and the ability to redirect their energy when they discover their mistakes and when things are not working.

Health-Tension Index: (Personal Work Attitudes) SR-28B

Low Risk

They have a unique combination of clear personal identity and an excellent sense of balance in their life which helps them see and accept successes and mistakes in a realistic manner.

Persistence: (Personal Work Attitudes) SR-29A

Low Risk

Their strong commitment to their inner ideals, their personal goals and beliefs about the future provides a compulsive need to push ahead and stay on track.

Customer Service Screen DEVELOPMENT COMMENTS

Evaluating What Is Said: (Communicating With Customers) SRV-7

Situational Risk

Because of their focused thinking, they may have difficulty correctly interpreting what others are saying leading them to be either too optimistic or skeptical and biased.

Developing A Response: (Communicating With Customers) SRV-8A

Situational Risk

Their strong sense of compassion and concern for others can cause them to be too subjective, to be too concerned about meeting the needs and interests of others.

Self Esteem: (Handling Customer Rejection) SRV-11D

Situational Risk

Their tendency to depreciate their inner worth and feel a need to constantly measure up can lead them to promise more than they can deliver and to have difficulty staying in control.

Self Assessment: (Handling Customer Rejection) SRV-12

Situational Risk

They tend to bite off more than they can chew, overlook their own potential for mistakes and have difficulty maintaining consistent confidence.

Sensitivity To Others (Handling Customer Rejection) SRV-15A

Situational Risk

Their concern about meeting needs and interests of customers can lead them to be too sensitive about what others think and have difficulty handling objections and difficult situations.

Attention To Policies, Procedures: (Job Rel. Attitudes) SRV-18D

Situational Risk

Their perfectionistic need for order and structure can lead them to dogmatically insist on obeying rules, policies and procedures to the letter of the law and without exception.

Meeting Schedules And Deadlines: (Job Related Attitudes) SRV-19A

Situational Risk

They have a strong sense of perfection and idealism which can lead them to very perfectionistic, insistent attitudes toward their schedules and time tables.

Customer Service Screen DEVELOPMENT COMMENTS

Evaluating What To Do: (Problem Solving Capacity) SRV-21

Situational Risk

Their thinking can become clouded either by excess attention or lack of attention to people, results or structure which can restrict their ability to make objective, reliable decisions.

Attention To Concrete Detail: (Problem Solving Capacity) SRV-22B

Real Risk

Their compulsion for seeing things in an unconventional and possibly creative manner can cause them to overlook concrete detail.

Role Satisfaction: (Personal Work Attitudes) SRV-26B

Real Risk

They are currently in social/role transition uncertain about what they want to do and feeling frustrated and dissatisfied about their current circumstances.

Consistency: (Personal Work Attitudes) SRV-30A

Real Risk

A combination of a compulsive need to push ahead and a feeling of frustration and dissatisfaction about their current circumstances can lead to inconsistencies in their decisions.

Customer Service Screen INTERVIEW GUIDES

Evaluating What Is Said: (Communicating With Customers) SRV-7

The Problem

They tend to:

1. Spend too much time in nonproductive activities dealing with unimportant issues.
2. Be unable to read buying signals from customers or have difficulty correctly seeing and understanding the crucial issues and genuine concerns.
3. Impose preset, rigid solutions which either discount or overlook the genuine customer needs and interests.

Interview Comments

The following steps are recommended:

1. Require them to interview you as a customer with a problem. Test their ability to ask key questions, to be responsive to your concerns and to keep the interview on track. Create distractions to challenge their ability to keep the interview on track and handle crucial issues.
2. Ask them to describe what they see as the key steps in the service process. Require them to demonstrate how these steps work to benefit both the customer and the organization.

Customer Service Screen INTERVIEW GUIDES

Developing A Response: (Communicating With Customers) SRV-8A

The Problem

They tend to:

1. Spend too much time and energy trying to satisfy or please customers.
2. Overlook or delay controversial or confrontational issues.
3. Promise more than they or the company can deliver or avoid telling the customer about issues which they find too difficult or to explain.

Interview Comments

The following steps are recommended:

1. Ask them to describe a typical service call. As they describe the situation, test their ability to stay focused, to handle personal issues without becoming too involved and to keep the process on track.
2. Spend more time than is necessary on personal issues. Keep them talking about unrelated issues. Test their ability to get around these distractions and keep the interview on track.

Customer Service Screen INTERVIEW GUIDES

Self Esteem: (Handling Customer Rejection) SRV-11D

The Problem

They tend to:

1. Underestimate their worth, blow up their flaws and imperfections.
2. Promise more than they can deliver.
3. Avoid difficult issues and respond impulsively to those issues when they must confront them.
4. Spend too much time with customers who make them feel comfortable.

Interview Comments

The following steps are recommended:

1. Give them a service problem to handle. During their assessment, aggressively challenge their thinking, disagree with their recommendations. Test their willingness and ability to handle your criticisms.
2. Ask them to evaluate the phrase 'The customer is always right'. After their response, use examples which illustrate problems where the customer is in the wrong, is extremely upset with the company and is acting in an aggressive manner. Require them to be specific about how they would handle the customer complaints.

Customer Service Screen

INTERVIEW GUIDES

Self Assessment: (Handling Customer Rejection) SRV-12

The Problem

They tend to:

1. Either overestimate or underestimate what they can accomplish.
2. Have difficulty handling difficult or confrontational issues without becoming either emotional or aggressive.
3. Lack consistency shifting from feelings of confidence and comfort to uncertainty and indecision.
4. Have difficulty seeing their mistakes or understanding what they did wrong.

Interview Comments

The Following Steps Are Recommended:

1. Give them a typical service problem involving a customer complaint. Require them to describe how they would handle the problem. Interrupt them constantly, aggressively challenge their thinking and require them to defend their solutions to the problem.
2. Ask them to describe the typical type of customer who would make a complaint against them.
3. Make certain that you do not hype them about the job. Require them to convince you why you should hire them.

Customer Service Screen INTERVIEW GUIDES

Sensitivity To Others: (Handling Customer Rejection) SRV-15A

The Problem

They tend to:

1. Put off objections, decisions and confrontations which make them feel uncomfortable or which threaten them.
2. Do more than is necessary to take care of customers.
3. Become too sensitive to personal criticism.
4. Be distracted by personal issues which do not relate to customer issues.

Interview Comments

The Following Steps Are Recommended:

1. Give them a typical customer problem to handle. You play the role of the customer. Use personal issues and small talk to distract them from handling the problem. Disagree with them and challenge their thinking to test their ability to handle difficult issues.
2. Ask them to describe their strengths and weaknesses. Pick out at least one of the weak points and suggest that their problem could be a major problem in your organization. Test their ability to handle the criticism and defend their ability to overcome any weak points and perform in your organization.

Customer Service Screen

INTERVIEW GUIDES

Attention To Policies And Procedures: (Job Related Attitudes) SRV-18D

The Problem

They tend to:

1. Be impatient and frustrated with a world that cannot meet their preconditions.
2. Be a rulebound person preoccupied with conformity to rules, standards and patterns, to principles or consistency and constancy and to organizational rules, goals, policies and procedures.
3. Become preoccupied with excessive feelings of commitment, duty, and unswerving loyalty, to ideal standards.

Interview Comments

The following steps are recommended:

1. Ask them to respond to customer problems which do not fit their interpretation of how things should be. Test their willingness and ability to entertain ideas and ways of doing things other than their own.
2. Give them a list of service tasks and ask them to prioritize the list. Challenge their reasons, potentially aggressively. Test their ability to remain objective and calm.

Customer Service Screen INTERVIEW GUIDES

Meeting Schedules And Deadlines: (Job Related Attitudes) SRV-19A

The Problem

They tend to:

1. Delay decisions and actions as they seek to measure the world against ideal standards.
2. Rationalize that their way of thinking is right regardless of evidence or circumstances.
3. Resist change, especially change which forces them to rethink their preset ideas.
4. Become so preoccupied with the future that they lose touch with the present.

Interview Comments

The following steps are recommended:

1. Assign them a typical service problem in your organization. Ask them to evaluate the problem and write down a list of prioritized solutions. Set a time limit and interrupt them constantly during the process.
2. Ask them to list the most important obligations of a service representative. Use an illustration which creates a problem which makes them apply these obligations and choose between their thinking and the customer's needs.

Customer Service Screen INTERVIEW GUIDES

Problem Solving Capacity: (Evaluating What To Do) SRV-21

The Problem

They tend to:

1. Be unable to readily see problems in crisis situations.
2. Be unable to see concrete details or effectively organize things.
3. Make bad decisions and believe so strongly that their decisions are right that nothing can prove them wrong.
4. Have difficulty keeping their attention focused on the problems at hand.

Interview Comments

The following steps are recommended:

1. Make biased statements and see whether they agree or disagree.
2. Give them a difficult situation in which there are more than one perspectives to the problem and ask them to tell you what they think the problems are and how they would respond to them.
3. Make statements which are inconsistent and possibly even contradictory and see whether they spot your incorrect thinking.

Customer Service Screen

INTERVIEW GUIDES

Problem Solving Capacity: (Attention To Concrete Detail) SRV-22A

The Problem

They tend to:

1. Become excited about new or large projects before they have completed complete current projects.
2. Overexert themselves to try to complete a project and many times simply run out of gas.
3. Bite off more than they can chew.
4. Feel despair and frustration when they cannot make things work out as expected.

Interview Comments

The following steps are recommended:

1. Give him a service work example in which the work of the service representatives is not getting done on time and the work is falling below standard. Have them evaluate the problems and determine what can be done to remedy the problems.
2. Give them a series of service tasks to evaluate. Ask them to prioritize the list and build an action plan for getting things done.

Customer Service Screen INTERVIEW GUIDES

Personal Work Attitudes: (Role Satisfaction) SRV-26B

The Problem

They tend to:

1. Be inconsistent in their actions and decisions.
2. Overlook opportunities in their current environment.
3. Tend to shift from a compulsive need to be doing things to a lack of urgency to get things done.
4. Tend to develop feelings of boredom or lack of challenge in their current situation.

Interview Comments

The following steps are recommended:

1. Ask them to picture themselves in your service work environment. Require them to describe the tasks they would enjoy, the tasks that would not be appealing and the issues which would be priorities for them.
2. Ask them to describe their feelings of frustration and uncertainty about their social/role image. Explore how these frustrations would not be present in your organization.
3. Ask them to describe the environment which is best for them. Require them to include items about authority, responsibility as well as specific work tasks and physical surroundings.

Customer Service Screen INTERVIEW GUIDES

Personal Work Attitudes: (Consistency) SRV-30A

The Problem

They tend to:

1. Shift from setting goals which are unrealistic or goals which are not challenging. In either case, they may lose interest or become distracted by new directions.
2. Set goals which are not rewarding. They are likely to not gain a sense of satisfaction, fulfillment or achievement by attaining their goals.
3. Shift from demanding too much out of themselves to demanding too little.

Interview Comments

The following steps are recommended:

1. Ask them to describe their past successes and failures. Require them to relate both their successes and mistakes to your current service position.
2. Ask them to describe a normal day's activities for them as a service representative highlighting what they plan to do, what obstacles would get in their way and what they would propose to do about them.
3. Ask them to describe what motivates them, what they are looking for in a job and what makes them feel satisfied and fulfilled.