



**AccuVision™**  
**WORKFORCE READINESS SYSTEM**  
**CUSTOMER CARE MODULE**

*Your Company Name*

**APPLICANT**

Feedback Report  
For

**JOHN DOE**  
**007-00-0007**

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**RESULTS**

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**6 out of 10** people  
with the same score as

**JOHN DOE**

have been successful in performing  
the customer care activities on their jobs.

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The AccuVision Customer Care Module measures customer service skills and abilities. Included here are skills such as creating and maintaining a positive company image, communicating in a positive manner, making sound decisions, developing solutions for dealing with problem situations, and listening and avoiding misunderstandings. Technical knowledge and experience of the applicant are not measured by the system and are not considered when compiling the information in this report. This individual's overall performance is based on his/her specific responses to the situations presented in the AccuVision assessment.

Neither the applicant's technical knowledge nor experience are measured by the system and have not been considered in this report. Information in this report is based strictly on the applicant's responses to the questions in the AccuVision Personal Qualities System.

# *AccuVision* WORKFORCE READINESS SYSTEM

## CUSTOMER CARE MODULE

### DEVELOPMENTAL INFORMATION

For

**JOHN DOE**

**007-00-0007**

This report provides feedback on the individual customer care skills measured in the evaluation, as well as additional developmental information. The information included is as follows:

#### **SECTION I: SKILL RANKING**

This section provides a definition of each of the three skills measured and ranks the participant's performance in each skill from the strongest (rank order) to the weakest. Those skills in which the participant's performance was above average are denoted by an "X." This information can be used to direct the training activities of the participant. Training should be considered for any skill without an "X" and the lowest ranked skills should be trained first.

#### **SECTION II: SKILL AND TASK ANALYSIS**

This section provides an analysis of the behaviors that comprise each of the skills assessed by the system. The participant's performance in each behavior is reported as either being acceptable or needing development. This information can be used to further specify the participant's training activities within each skill area.

#### **SECTION III: PERFORMANCE DEVELOPMENT STRATEGIES**

This section provides suggested activities the participant can engage in to improve performance in the skill areas most in need of development. These performance development strategies can be shared with others in the organization who are in a position to assist in implementing a developmental plan. When considering a developmental plan, keep in mind that these suggestions are intended to supplement rather than replace other formal developmental activities. Also keep in mind that there are numerous training programs, local college courses, books, and additional resources that are available to assist you in your developmental efforts.

# *AccuVision* WORKFORCE READINESS SYSTEM

## CUSTOMER CARE MODULE

### SECTION I: SKILL RANKING

	Rank*	Performance**	Skill
	Order	Level	
<b>CUSTOMER RELATIONS</b>			
Communicates in a positive manner, especially when handling complaints or conflict; efficiently obtains additional resources as needed to satisfy customer needs.	1	X	
<b>DECISION MAKING</b>			
Makes sound decisions when carrying out company policies and guidelines, develops solutions for customer problems, recognizes the limits of own authority and knows when a customer problem should be referred to others.	2		
<b>COMMITMENT TO QUALITY</b>			
Works and communicates with clients and customers to satisfy their expectations; actively listens to customers to avoid misunderstandings.	3		

\* Rank Order: 1 equal's strongest skill

\*\* Performance Level: X indicates that on this skill the individual scored better than 65% of the people in the AccuVision data base.

# *AccuVision* WORKFORCE READINESS SYSTEM

## CUSTOMER CARE MODULE

### SECTION II: SKILL AND TASK ANALYSIS

Effective performance in the situations depicted in the tape required the application of different skills. Below is a listing of the simulated work activities, clustered according to the skill most needed to effectively perform them. Also, the individual's performance level (acceptable or needs development) is indicated for each work activity associated with the skill.

#### ***CUSTOMER RELATIONS:***

**Communicates in a positive manner, especially when handling complaints or conflict; efficiently obtains additional resources as needed to satisfy customer needs.**

#### ***Situations In Which the Participant's Performance Was Acceptable***

- Remains polite and professional when interacting with customers who make unreasonable demands.
- Faced with a hostile customer, maintains positive demeanor and earnestly attempts to help the customer.

#### ***Situations In Which the Participant's Performance Needs Development***

- Increases customer loyalty by immediately addressing concerns and following up.
- Handles competing customer needs in a calm and helpful manner, follows through on commitments.

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#### ***DECISION MAKING:***

**Makes sound decisions when carrying out company policies and guidelines, develops solutions for customer problems, recognizes the limits of own authority and knows when a customer problem should be referred to others.**

#### ***Situations In Which the Participant's Performance Was Acceptable***

- Recognizes when it is best to personally handle customer needs versus when to direct the customer elsewhere.
- Recognizes priorities, then implements solutions based on an understanding of business need.

#### ***Situations In Which the Participant's Performance Needs Development***

- Decides when to vary from routine operating policies/guidelines and when to adhere to them.
- Recognizes when more information is needed for making a decision.
- Recognizes the limits of own authority, correctly decides when to use those limits in order to keep the customer satisfied.

***COMMITMENT TO QUALITY:***

**Works and communicates with clients and customers to satisfy their expectations; actively listens to customers to avoid misunderstandings.**

***Situations In Which the Participant's Performance Was Acceptable***

- ❑ Evaluates alternative possibilities for customer satisfaction, then chooses one that minimizes harm and makes the customer feel supported.
- ❑ Proactively helps coworkers for the purpose of increasing overall quality of company operations.
- ❑ Voice, body language, and attitude communicate to the customer that satisfying the customer's need is of highest importance.

***Situations In Which the Participant's Performance Needs Development***

- ❑ Balances own work schedule against customer needs; willingly makes adjustments.
- ❑ Determines customer need and improves customer relations by "listening" to customer comments and requests.

### **SECTION III: PERFORMANCE DEVELOPMENTAL STRATEGIES**

#### **SKILL: CUSTOMER RELATIONS**

##### **TASK: INCREASES CUSTOMER LOYALTY BY IMMEDIATELY ADDRESSING CONCERNS AND FOLLOWING UP.**

- ❑ Remember that assisting your customer is your first priority. Customers want to feel that you are sincere in your desire to help them and that they are not interrupting your “real” work.
- ❑ Sometimes it may be necessary for you to help customers locate certain products. When possible, put in the extra effort to accompany them to the correct aisle and lead them to the product. If you can't do that for whatever reason (say, for example, you are assisting another customer), then be very specific in your directions and guidance.
- ❑ If a problem cannot be immediately resolved and follow-up contact with the customer is required, take responsibility for making sure that the problem gets resolved.
- ❑ Sometimes you may need help from others in resolving a customer’s issue. When the problem is resolved, be sure to acknowledge the assistance of others by a personal “thank you”.
- ❑ Act on customer problems immediately. Do not delay hoping that the problem will go away. Take responsibility, it is your problem to resolve.
- ❑ If there is no way that you are going to be able to satisfactorily resolve the customer’s problem, make sure that your supervisor is informed. Maybe there is something that your supervisor can do that you cannot.
- ❑ Keep in mind that YOU are ultimately responsible for customer satisfaction. Anticipate problems, prepare for them, and when they occur, act immediately to resolve them.

### **SECTION III: PERFORMANCE DEVELOPMENTAL STRATEGIES**

#### **SKILL: CUSTOMER RELATIONS**

#### **TASK: HANDLES COMPETING CUSTOMER NEEDS IN A CALM AND HELPFUL MANNER, FOLLOWS THROUGH ON COMMITMENTS.**

- ❑ On those occasions where you have two customers needing your attention at the same time, always be polite and respectful to both customers. Before attending to either customer, make sure that the other customer is okay and promise to get right back.
- ❑ If you leave one customer to assist another, be sure to return to the first customer when your business with the other customer is done. Make sure that the customer you left behind feels confident that you have done everything you could to assist.
- ❑ Consider how attending to one customer is going to affect the other customer. If you are not going to be able to get back to the first customer, find someone to take your place.
- ❑ Remember that your customers have different needs and experiences. Some may have had a bad day and are real intense and demanding, whereas others may be calm and cool. If you have multiple customers demanding your attention at the same time, try to evaluate their mood. The “squeaky wheel” generally gets first consideration but make sure that the other customer knows you will make every effort to help them as well.
- ❑ Sometimes it may be necessary for you to help customers locate certain products. When possible, put in the extra effort to accompany them to the correct aisle and lead them to the product. If for any reason you can't do that (e.g., you are assisting another customer), then be very specific in your directions and guidance.
- ❑ Recognize that in order to be of assistance, you must first assess the specific needs and requirements of your customers. If you are working with more than one customer, you must understand the needs of both and make sure that the needs of both customers are met.
- ❑ There are times when you must hand a customer off to a coworker. You can improve your ability to do so effectively by getting to know what your coworkers can and cannot do. Through conversations with your manager and experienced coworkers, learn the general function of other people and other departments. Seek opportunities to work with other departments to get to know them better. Build positive working relationships.
- ❑ Take the time to learn the roles and responsibilities of your coworkers so that you are able to anticipate their needs. In addition, try to see issues and situations from their perspective before you ask for assistance or place additional demands on them for help.

### **SECTION III: PERFORMANCE DEVELOPMENTAL STRATEGIES**

**SKILL:        DECISION MAKING**

**TASK:        DECIDES WHEN TO VARY FROM ROUTINE OPERATING POLICIES/GUIDELINES AND WHEN TO ADHERE TO THEM.**

- ❑ Learn to recognize when a situation is outside of your level of authority. For example, if you are given certain guidelines for how to behave with a customer, but then something comes up that is outside of those guidelines, find a more experienced coworker to help out.
- ❑ If a situation comes up and you are in doubt, ask your supervisor for help. It is better to handle a customer problem correctly than to guess and get it wrong.
- ❑ Ask your supervisor what customer issues you can resolve versus those that need more authority.
- ❑ Customers with problems will often ask to speak directly to the manager. If you feel that you can resolve the problem to the customer's satisfaction, attempt to handle the problem personally. However, even if you feel it necessary to pass the customer along to a manager, get all the information you can about the problem first.
- ❑ Plan ahead. Think about possible customer problems and be ready with suggestions and/or solutions.
- ❑ If you feel it necessary to change from your normal way of doing things, consider how your change will affect other customers and coworkers. If necessary, seek supervisory help with the decision.
- ❑ Review and evaluate your decisions. Did you make the right decision? Discuss your decision with your supervisor. Should you have made the decision without guidance, or should you have sought out help?

### **SECTION III: PERFORMANCE DEVELOPMENTAL STRATEGIES**

#### **SKILL: DECISION MAKING**

#### **TASK: RECOGNIZES WHEN MORE INFORMATION IS NEEDED FOR MAKING A DECISION.**

- ❑ If a situation occurs with a customer that is outside of your experience, before getting help from a more experienced coworker, first find out all you can about the problem.
- ❑ When determining a customer's needs, try not to ask questions that result in a simple "yes" or "no" answer. You will get further by asking questions such as "What do you need the product for?" "Tell me what happened." or "How often do you ...?"
- ❑ Get the customer talking. When you have all the information, you will be in a better position to decide how best to help the customer.
- ❑ Keep in mind that it is sometimes useful to repeat what the customer says in your own words. This is called "restatement." Restatement helps to prevent misunderstanding and ensures that any assistance you provide is on target.
- ❑ Customers who experience problems will often ask to speak directly to the manager. Before passing the problem on to your manager, attempt to obtain all the information about the problem that you can. In this way the manager can have a solution ready.
- ❑ Avoid jumping to quick decisions. It is better to take a little time, making sure that you thoroughly understand the situation, before making a decision.
- ❑ There are many choices you can make regarding how to help the customer. Don't assume that you know the answer. Sometimes customers want a discount, other times they just want to feel like you are doing something to help. Find out what the customer wants/needs before deciding what to do about it.

### **SECTION III: PERFORMANCE DEVELOPMENTAL STRATEGIES**

#### **SKILL: DECISION MAKING**

#### **TASK: RECOGNIZES THE LIMITS OF OWN AUTHORITY, ORRECTLY DECIDES WHEN TO USE THOSE LIMITS IN ORDER TO KEEP THE CUSTOMER SATISFIED.**

- ❑ Learn to recognize what you can do and can't do for any situation. If, for example, you are given some leeway for giving away product (e.g., food in a restaurant, out of date sales prices) to a customer who has a bad experience, it may not always be necessary to do so. Learn to evaluate the balance between customer need and business need and base your actions according to that understanding.
- ❑ Sometimes it may be necessary for you remain patient with customers who seem to be making unreasonable demands. It may only be that they lack some understanding. Keep your voice calm as you try to resolve their problem.
- ❑ Occasionally, in the interests of maintaining good customer relations, it is necessary to let the customer "get away with it." Learn to recognize when it is best to let the customer have their way, and when it is best to say "no." Remember, even when saying "no," it is important to remain professional.
- ❑ Occasionally you will be faced with awkward customer situations. Discuss with more experienced coworkers what they have done in similar situations, then learn from their experience.
- ❑ Accept ownership for problems or complaints. Keep in mind that even though you, personally, may have had nothing to do with a problem, you represent the company to the customer. Avoid blaming others or procedures for problems that occur.
- ❑ After you have taken the necessary actions to deal with a customer's problem, identify yourself to the customer as someone they should contact if they have any additional needs.
- ❑ Keep up with all the new products and services offered by your company. You can do this through reading company newsletters, memos, and catalogs. Knowledge of what is available for your customers will help in balancing business need and customer satisfaction.
- ❑ When discussing the benefits of a product or service with a customer, tailor your comments to the specific customer. First, attempt to understand the needs of the particular customer by asking open-ended questions. What is his or her understanding of the product or service offered? Check for your own understanding by repeating their needs back to them in your own words. Then use your understanding of their needs to tailor your comments.
- ❑ Have supporting information available to back up your views and opinions when interacting with your customer. You aren't in an argument. However, the more information you can share with the customer the more likely you are to be able to resolve their concern.

### **SECTION III: PERFORMANCE DEVELOPMENTAL STRATEGIES**

#### **SKILL: COMMITMENT TO QUALITY**

#### **TASK: BALANCES OWN WORK SCHEDULE AGAINST CUSTOMER NEEDS; WILLINGLY MAKES ADJUSTMENTS.**

- ❑ Remember, YOU are ultimately responsible for keeping the customer satisfied. If this means interrupting your own plans (e.g., putting aside the inventory that you MUST finish before end of shift) then do so and smile while you are doing it. The customer must not feel that he/she is interrupting you at your work.
- ❑ Learn to approach your customer's without having to force them to ask you for assistance. A customer in need of your help will often indicate that they want your assistance through subtle cues and body language. For example, you may see a customer looking upset, lost, or confused. Approach the customer and offer your assistance.
- ❑ Occasionally it may be necessary to go beyond what you normally consider your job duties. For example, you may be busy with an important task that needs to be completed before the day is over when you spot a customer needing assistance. It should be another's job to take care of the customer, but all others are busy. At this point you should set aside your own task and see to the customer's needs.
- ❑ In situations where it is necessary to refer the customer to another employee for assistance, and when time demands permit, escort the customer to the other employee and make appropriate introductions.
- ❑ Bear in mind that many customers feel uncomfortable asking for help and that you may need to actively encourage them to ask questions. Assure them that you are there to provide information as well as assistance.
- ❑ Take ownership of the customer's problem and exceed their expectations when resolving the problem. Doing so will provide you with a sense of satisfaction at a job well done, and increase customer loyalty.
- ❑ There is always a balance between what you need to get done during your shift and the demands that customers make upon your time. Consider the impact of helping the customer on your own schedule of what you need to accomplish. Sometimes it is possible to satisfy the customer without changing your own schedule.
- ❑ Remember that there are cultural differences among your customers. For some cultures, it is the most natural thing in the world to come up to an employee, interrupt the employee at work, then demand to be helped. For other cultures, interrupting someone at work would be considered rude. Instead, they will provide you with non-verbal cues that they need help, and expect you to come to them and offer assistance. They could get upset if you do not respond to their cues. Be alert for these non-verbal cues. Don't assume that since they aren't asking you for anything that they don't need your help.

### **SECTION III: PERFORMANCE DEVELOPMENTAL STRATEGIES**

#### **SKILL: COMMITMENT TO QUALITY**

#### **TASK: DETERMINES CUSTOMER NEED AND IMPROVES CUSTOMER RELATIONS BY “LISTENING” TO CUSTOMER COMMENTS AND REQUESTS.**

- ❑ Sometimes it is necessary to “listen” between the lines of customer comments and requests. Note the customer’s body language. Often the customer just wants help and may be expressing the request poorly. Find out what the customer really needs and do what you can to respond to that need.
- ❑ Recognize that in order to be of assistance, you must first understand the needs and concerns of your customers.
- ❑ Ask the customer questions to determine potential needs and interests, and then talk to the customer about the products/services that you think best match the customer’s needs.
- ❑ When determining a customer’s needs, try to ask questions that require the customer to explain. You will gain useful information from questions such as, “What do you need the product for?” or “How often do you need the product?” or “How do you intend to use the product?”
- ❑ Keep in mind that it is sometimes useful to restate in your own words what you see as the customer’s description of his/her needs. This helps prevent misunderstandings and ensures that your recommendations are on target.
- ❑ Never send the customer away frustrated. You are responsible for the customer’s satisfaction, regardless what past history that customer has with your company. Be friendly and courteous and help the customer to find the information that he/she seeks.
- ❑ Avoid the temptation to try to explain the cause of the problem (e.g., “I wasn’t here last week so I don’t know what happened.”) or recommend a solution without knowing all the facts.
- ❑ Always evaluate your performance. Did you resolve the customer’s issue in a quick and effective manner? Could you have done better?