

Customer Service Profile™ Financial Services

CONFIDENTIAL

COACHING REPORT

Thursday, January 10, 2008

Sally Sample

Demonstration Pattern-NOT FOR ACTUAL USE

Profiles International, Inc.

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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.

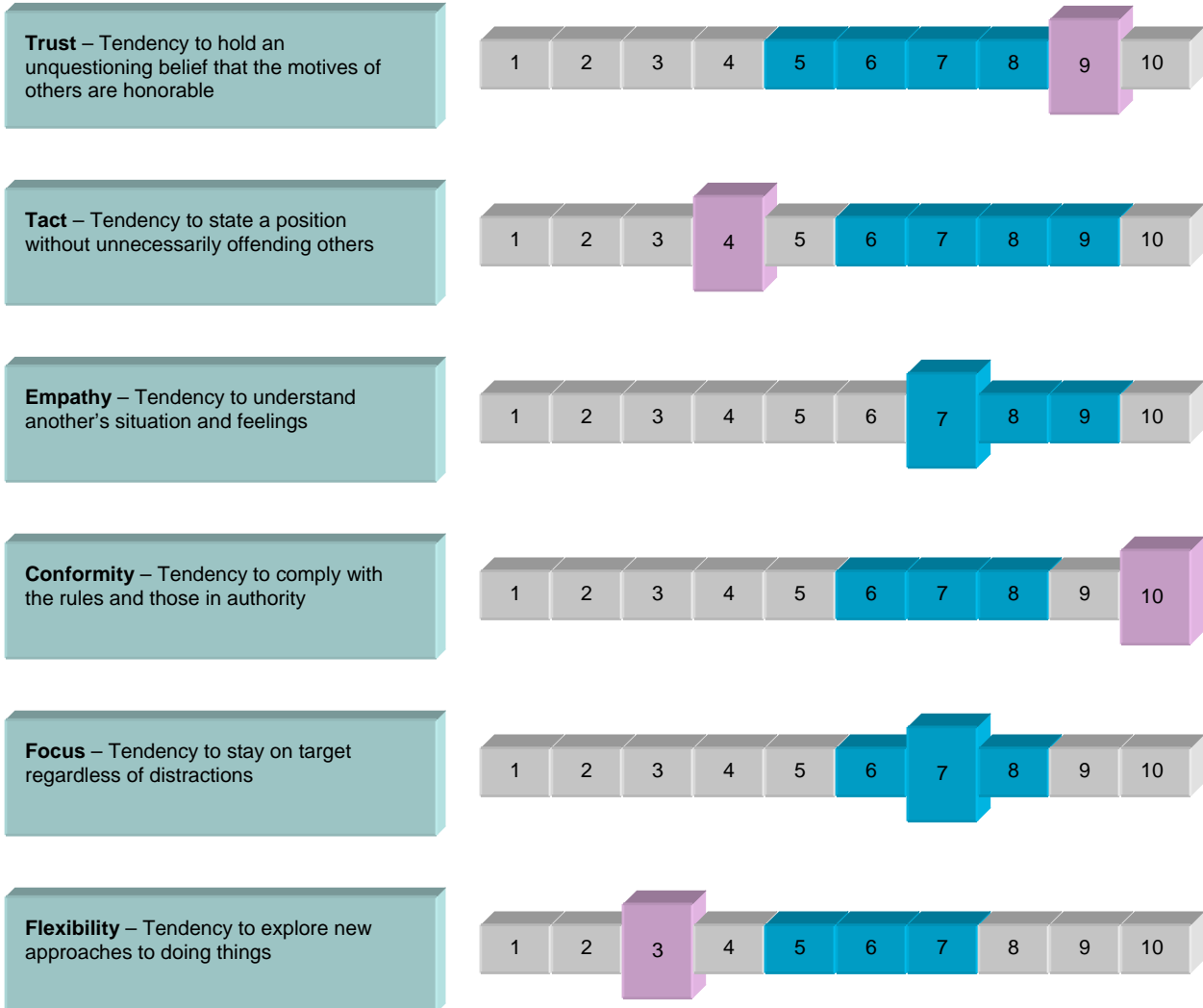
This report reflects the responses provided by Sally Sample when she completed the Customer Service Perspective assessment. The information is presented in the following four parts:

- **Behavioral Characteristics**— six behavioral characteristics that are important factors for success in providing service to customers.
- **Proficiencies**— a view of basic proficiency in mathematics and vocabulary.
- **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.
- **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 in working with Sally.

Summary of Behavioral Characteristics

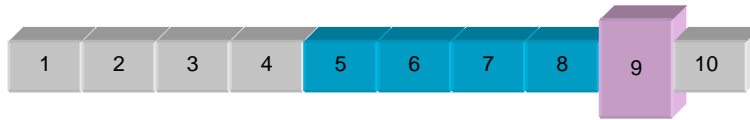
The darker shading represents the Job Match Pattern for the role of Demonstration Pattern-NOT FOR ACTUAL USE. The larger box indicates her score.



Behavioral Characteristics

Trust

- Wary
- Vigilant
- Skeptical



- Unquestioning
- Uncritical
- Optimistic

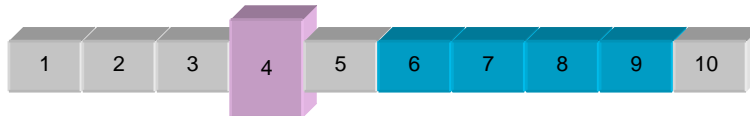
Pattern 5-8 Score 9

Comments on Trust

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

- Direct
- Obvious
- Forthright



- Discreet
- Diplomatic
- Restrained

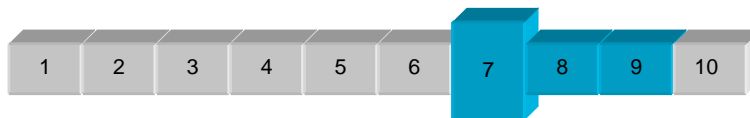
Pattern 6-9 Score 4

Comments on Tact

She can seem inconsiderate regarding the feelings of others as shown by her relatively low level of tact. This may be due to a lack of understanding for a customer's needs 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

- Detached
- Indifferent
- Distant



- Understanding
- Compassionate
- Sensitive

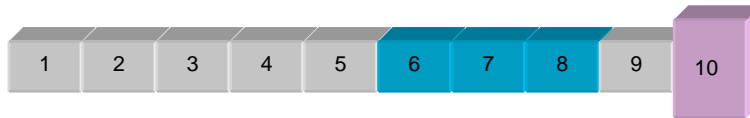
Pattern 7-9 Score 7

Comments on Empathy

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

- Inventive
- Free-spirited
- Independent



- Traditional
- Compliant
- Conventional

Pattern 6-8 Score 10

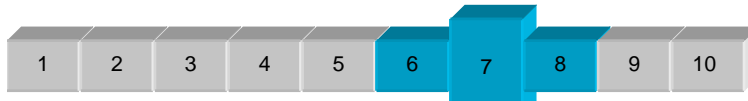
Comments on Conformity

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.

Behavioral Characteristics (cont'd)

Focus

- Distractible
- Preoccupied
- Inefficient



- Attentive
- Purposeful
- Efficient

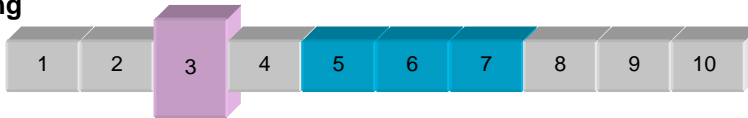
Pattern 6-8 Score 7

Comments on Focus

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. 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.

Flexibility

- Uncompromising
- Inflexible
- Cautious



- Adaptable
- Accepting
- Enjoys new approaches

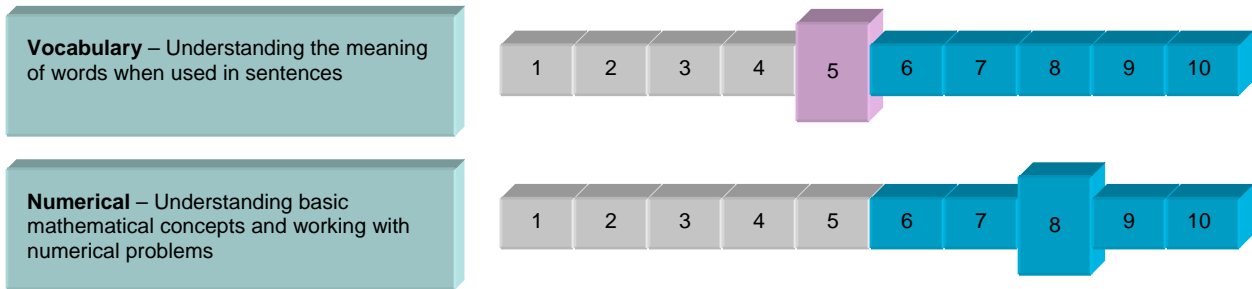
Pattern 5-7 Score 3

Comments on Flexibility

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.

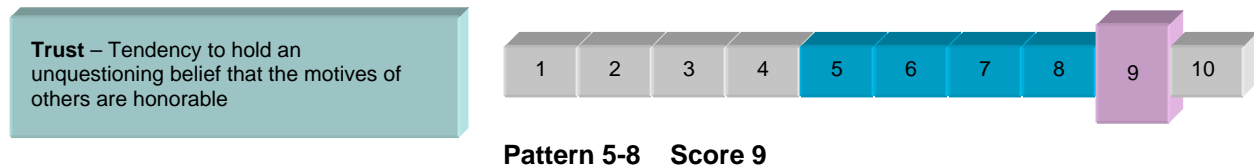
Proficiencies

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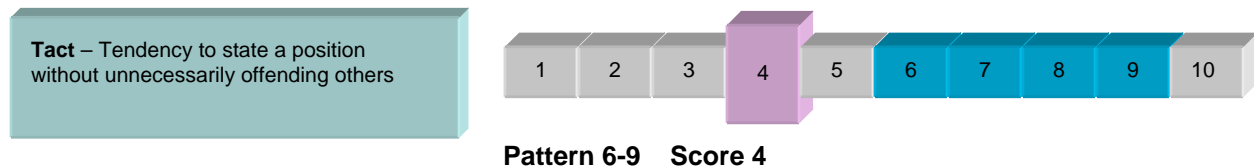
Considerations for Employee Development

The darker shading represents the Job Match Pattern for the role of Demonstration Pattern-NOT FOR ACTUAL USE. Ms. Sample scored outside the Job Match Pattern in the areas listed below. Information and coaching comments are provided to facilitate working with her.



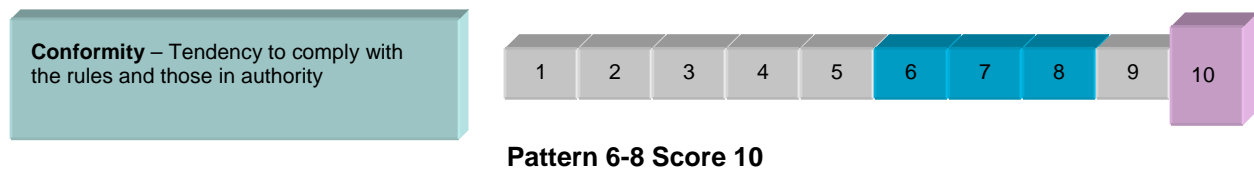
Considerations for Employee Development

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.



Considerations for Employee Development

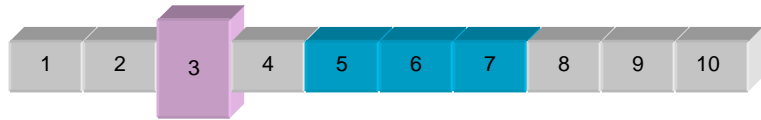
Assertiveness training that emphasizes diplomacy and etiquette may help to improve what appears to be a low level of tactfulness in Ms. Sample. While probably aware of the basic fundamentals of appropriate social skills, her motivation to put these skills in practice may be the relevant case here. The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



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 5-7 Score 3

Considerations for Employee Development

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

Fifty (50) questions related to providing service to the customer were presented to Sally. 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 Sally.

PERSPECTIVES THAT CONFLICT	HER ANSWER
It is impossible to help some clients.	Yes
No client is more important than another; all should be treated equally.	No
I might neglect to inform clients of our products to avoid wasting their time.	Yes
Speed is the most important aspect when dealing with clients.	No
Consumer trust is directly related to my knowledge of the products.	No
Rather than listen to a client's problems, my job is to solve their financial needs.	Yes
Consumer attention is more important than the length of the call time.	Yes
Before getting down to business, it is important that I chat with my customers.	No
Once served, I move on to help the next client.	Yes
To learn from my supervisors, I like to discuss how problem situations were handled.	Yes
Rather than having to go to my manager, clients expect me to be able to make a decision on the spot.	No
To better meet a client's needs, I like to develop rapport with them.	No
Explaining to a client why he or she is wrong can often satisfy a client's true needs.	Yes
Clients that have been given substandard service will come back if your rates and benefits are good.	Yes
If I don't know something, I shouldn't let my client realize that fact.	Yes
I am responsible for fulfilling each client request quickly, even if I don't understand their needs.	No
I should let a customer chat if they want to.	No
Maintaining customers is not as important as bringing in new ones.	No