



Development Report

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ID# 1234

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Sample Company

Introduction

This report can help you identify strengths and areas in need of development in terms of customer service-related characteristics.

Using the information provided in this report, you can find out what skills can be leveraged and what is needed for improving your performance or preparing yourself for more senior roles. Basic strategies and a goal-setting framework are included in the report to help you create a plan of action moving forward.

1 Overview of Scores

Overall Review - This section provides a summary of your strengths and areas in need of development.

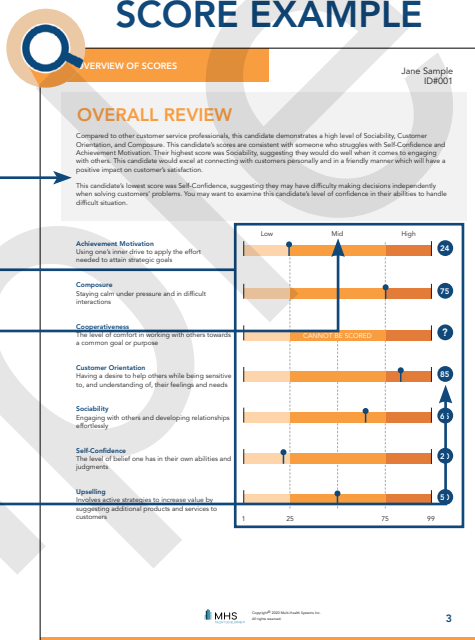
Scores Overview - This section gives a summary of your results.

Score Labels - Score labels provide a visual guide, indicating if a score falls into the:

- Low range (in the bottom 25% of the comparison group)
- Mid range (in the middle 50% of the comparison group)
- High range (in the top 25% of the comparison group)

Scores - The scores are in percentiles, ranging from 1 (lowest) to 99 (highest). For example, if you have a score of 90 that means you have scored better than 90% of those who have taken the assessment previously.

SCORE EXAMPLE



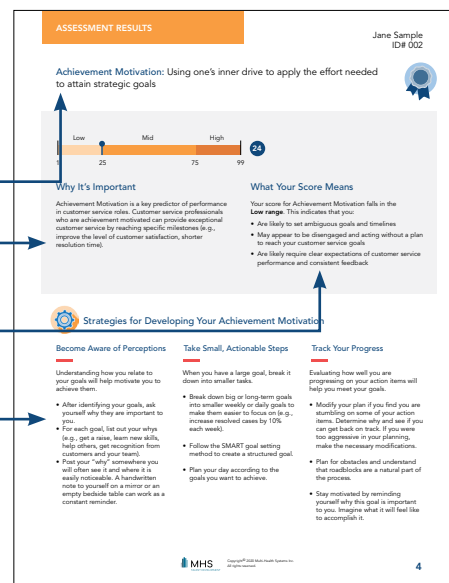
2 Assessment Results

Description - This section describes the competency.

Importance - This section explains why the competency is important for being successful in your role.

Score Interpretation - This section describes what your score means.

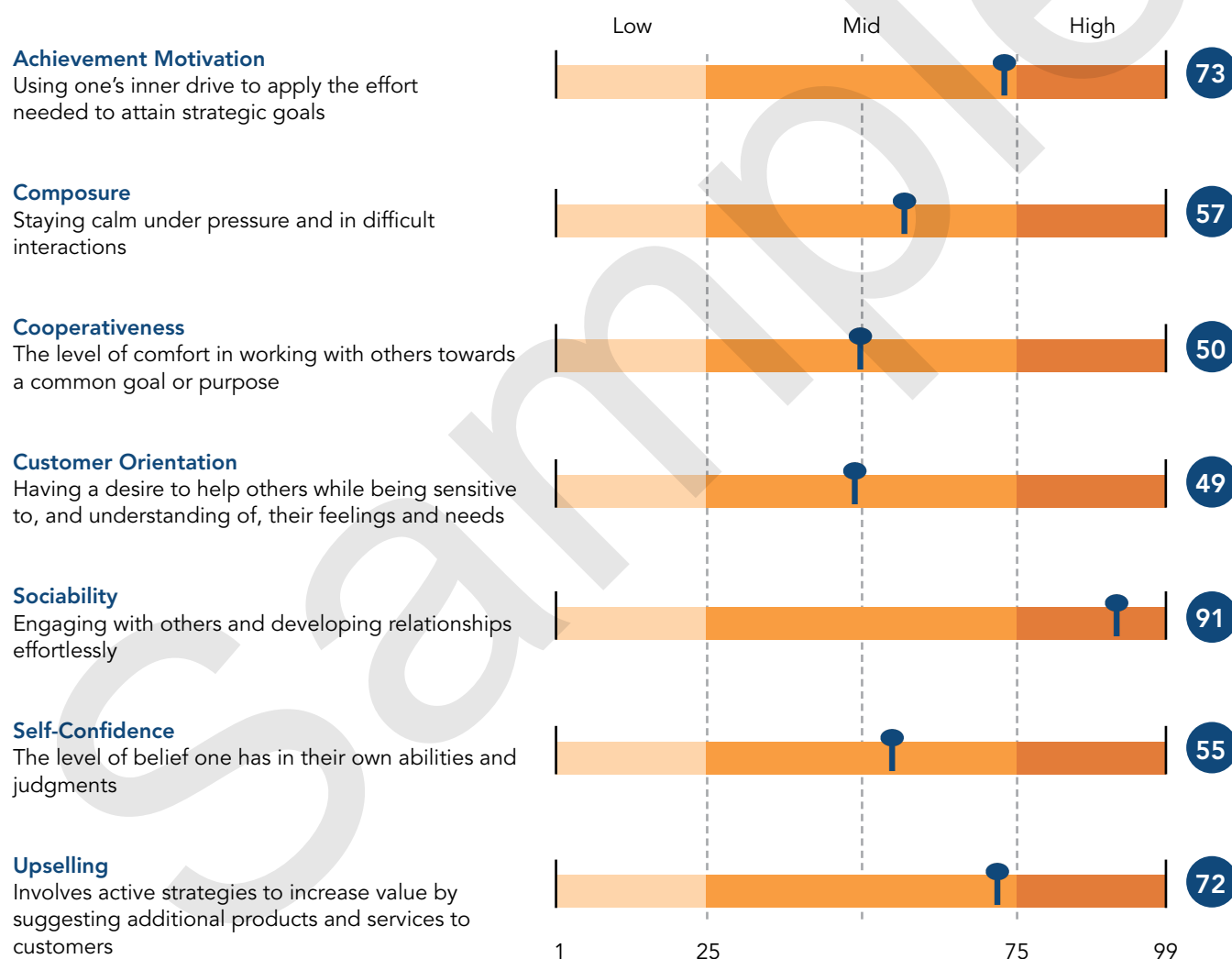
Strategies for Development - This section delivers strategies on how to improve the competency.



OVERALL REVIEW

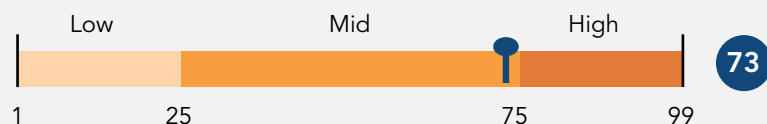
Your results suggest you are likely to communicate with others in a positive, friendly manner. In addition, you are likely to set clear goals and achieve them. Your tendency to develop relationships with customers will foster trust and customer loyalty.

Overall, you show strengths and competencies that are required for successful performance in your role.





Achievement Motivation: Using one's inner drive to apply the effort needed to attain strategic goals



Why It's Important

Achievement Motivation is a key predictor of performance in customer service roles. Customer service professionals who are achievement motivated can provide exceptional customer service by reaching specific milestones (e.g., improve the level of customer satisfaction, shorter resolution time).

What Your Score Means

Your score for Achievement Motivation falls in the **Mid range**. This indicates that you:

- Are likely to set moderate but achievable customer service goals
- Are often working with a plan to reach your goals
- Are likely to maintain commitment to your main goals



Strategies for Developing Your Achievement Motivation

Become Aware of Perceptions

Understanding how you relate to your goals will help motivate you to achieve them.

- After identifying your goals, ask yourself why they are important to you.
- For each goal, list out your whys (e.g., get a raise, learn new skills, help others, get recognition from customers and your team).
- Post your "why" somewhere you will often see it and where it is easily noticeable. A handwritten note to yourself on a mirror or an empty bedside table can work as a constant reminder.

Take Small, Actionable Steps

When you have a large goal, break it down into smaller tasks.

- Break down big or long-term goals into smaller weekly or daily goals to make them easier to focus on (e.g., increase resolved cases by 10% each week).
- Follow the SMART goal setting method to create a structured goal.
- Ask yourself what the most important tasks are for achieving your goals.
- Prioritize your tasks based on their importance and plan your day according.

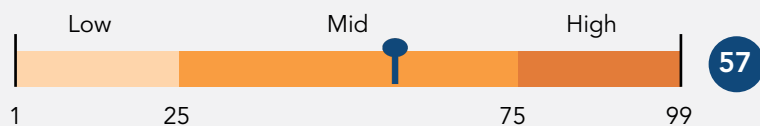
Track Your Progress

Evaluating how well you are progressing on your action items will help you meet your goals.

- Plan for obstacles and understand that roadblocks are a natural part of the process.
- Modify your plan if you find you are stumbling on some of your action items. Determine why and see if you can get back on track. If you were too aggressive in your planning, make the necessary modifications.
- Stay motivated by reminding yourself why this goal is important to you. Imagine what it will feel like to accomplish it.



Composure: Staying calm under pressure and in difficult interactions



Why It's Important

Customer service roles are inherently stressful. The ability to stay level-headed under pressure and handle customer complaints in a calm manner is vital for providing outstanding service. Handling customer complaints effectively often develops customer loyalty.

What Your Score Means

Your score for Composure falls in the **Mid range**. This indicates that you:

- May periodically lose focus when under a lot of stress and when handling multiple requests
- May occasionally become stressed when handling returns or complaints
- Are likely to not take it personally when dealing with angry customers



Strategies for Developing Your Composure

Plan Your Day

Prioritizing your tasks and planning your day accordingly gives you control and reduces your stress level.

- Make a list of your tasks when you feel overwhelmed by them.
- Prioritize your tasks by determining which ones are the most important and should be done first.
- Schedule a time for each task. It is important to be realistic about the amount of time you assign to each task and consider some buffer time for unpredictable events.

Stay Objective

It is important to stay objective and not take things personally when dealing with angry customers.

- Detach yourself from customers' tone, words, and body language. Try to focus on their problem.
- Understand that customers are not angry with you personally, but rather with the difficult situation they are experiencing.
- Empathize with them and focus on fixing their problem.

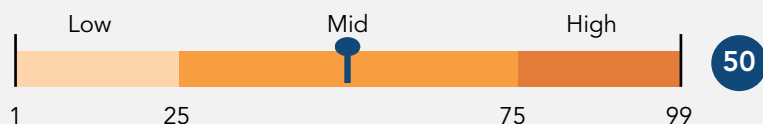
Practice a Healthy Lifestyle

Reduce your stress by adapting a healthy lifestyle.

- Take short breaks to relax and recharge your battery (e.g. take a short walk, be present, or meditate in a calm, quiet place).
- Pick up a personal project/hobby. It gives a focus point for your mind to switch from work to your own interests when the day is done.
- Do activities that calm your mind (e.g., read a good book, exercise, or listen to relaxing music).



Cooperativeness: The level of comfort in working with others towards a common goal or purpose



Why It's Important

Providing exceptional customer service is a team effort that requires collaboration to build a strong, positive image of the company. Being able to effortlessly help colleagues, and effectively share customer feedback with other departments, improves the quality of customer service.

What Your Score Means

Your score for Cooperativeness falls in the **Mid range**. This indicates that you:

- Often work closely with your team to pool knowledge and resources to address customer issues
- Are likely to share information and expertise with your colleagues
- Generally appear as someone who people can rely on in challenging situations



Strategies for Developing Your Cooperativeness

Knowledge of Roles

If there is strong collaboration between various teams and departments, any problem can be fixed easily, but first you need to know each team or department's role.

- List teams that are either involved directly or indirectly in the delivery of customer service.
- List the roles and responsibilities of others in your organization.
- Identify their area of expertise and when you need to direct the customers to them.
- Establish expectations for when they need to be involved.

Focus on Team Goals

The main goal in customer service is delivering exceptional care to customers, and this cannot be accomplished by a single person.

- Keep the team's goal in your mind—share your own expertise with others and offer help to provide exceptional customer service.
- Share information freely with colleagues to keep them informed and up-to-date, so they will be provided with everything they need to perform their best.

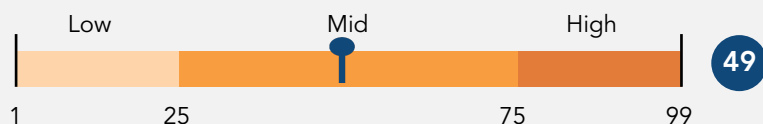
Stay Connected

Communication can help you resolve customer issues more quickly and efficiently.

- Talk to your team members more often. There are likely some unrecognized subject-matter experts scattered in your team. These people may be able to answer questions that even the more senior people may not know the answer to.
- Spend time with your colleagues during breaks and lunch hours and learn from challenges they are facing.
- Share your own challenges and what you have learned with others.



Customer Orientation: Having a desire to help others while being sensitive to, and understanding of, their feelings and needs



Why It's Important

Customer Orientation is essential for achieving customer satisfaction. Addressing all customer concerns, being empathetic, and providing them with solutions are the keys to success in today's highly competitive marketplace.

What Your Score Means

Your score for Customer Orientation falls in the **Mid range**. This indicates that you:

- Are likely to enjoy helping customers when they need assistance
- Often listen to customers' feelings and acknowledge their concerns
- Make customers feel heard but they may imagine better service elsewhere



Strategies for Developing Your Customer Orientation

Demonstrate Empathy

Show empathy to your customers by acknowledging their concerns.

- Listen carefully and try to repeat what customers say to reassure them you are listening.
- Use statements that convey empathy to your customers such as, "I understand how frustrating it is to..." or "I know how confusing it would be when..."
- Reassure them that you are taking their problem seriously and you are there to assist them.

Provide Solutions

Once the customer's feelings are acknowledged, it is time to address their concerns.

- Ask questions so that they can define their difficulties. This makes it easy for them to point out the aspects of the problem which are important for you to offer solutions.
- Generate potential solutions to the customer problem.
- Clearly explain to the customers the steps that will be taken to address their problem. This makes the customer feels in control of the situation.

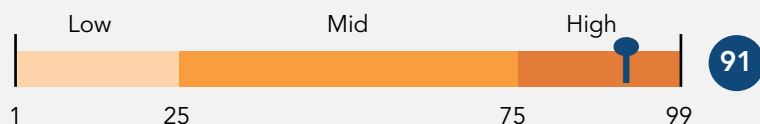
Follow-Up

Follow up to ensure your solutions have addressed the cause of the issue.

- Follow up with customers to solve any unfinished issues.
- Check with the customer to see if your solution worked and if there still remain unfinished issues.
- Following up shows your customers that you really care, and it will create a sense of trust and a great experience for them.



Sociability: Engaging with others and developing relationships effortlessly



Why It's Important

Communicating and establishing relationships are essential to the customer service role. Individuals with a high level of Sociability seem approachable and are easy to talk with, which fosters trust and customer loyalty.

What Your Score Means

Your score for Sociability falls in the **High range**. This indicates that you:

- Actively build sustainable relationships and trust with customers
- Prefer to have open and interactive communication with customers
- Set and maintain a positive and friendly attitude when interacting with customers



Strategies for Maintaining Your Sociability

Find Commonalities

Finding common ground between you and a customer is a good way to start off an interaction.

- Identify and share similarities in order to build a relationship with someone new. Finding ways that you and a new customer are similar is necessary for developing a positive relationship.
- Start with things that you have in common and that they are interested in. Get that person talking and share your own personal experience. The back and forth is a good way to learn more about someone.

Use Positive Communication

Using positive communication will make customers feel comfortable around you and help you build trusting relationships.

- Use positive phrases even when you are delivering bad news to customers. For example, if you cannot provide a solution to the customer right away, focus on how and when you can address their issues.
- Portray positive body language with open arms, open palms, and nodding when you are interacting with customers. If you are on the phone, be mindful of the tone of your voice.

Develop a Set of Conversation Starters

Prepare a few stories or questions that are good for getting a conversation going.

- Think of different ways to start a conversation that make sense in the situation. Use that to create a dialogue and get someone talking.
- If you are feeling less confident about a conversation starter, try it out with people you trust beforehand. You may find yourself being more confident and more prepared by putting in a little more effort.



Self-Confidence: An individual's level of belief in their abilities and judgments



Why It's Important

Having a high level of confidence is important when helping customers. Self-Confidence is a sign of competence in customers' minds and ensures strong customer support.

What Your Score Means

Your score for Self-Confidence falls in the **Mid range**. This indicates that you:

- Are likely to be self-assured about your success in handling customer concerns
- Are likely to be familiar with the general steps for troubleshooting complex customer issues
- May hesitate before making important decisions



Strategies for Developing Your Self-Confidence

Enhance Your Knowledge of Products and Services

Knowledge of your products and services is key to providing customer service with confidence.

- Have first-hand experience using the product or service you are offering.
- List all the benefits and areas that can be improved for each product or service.
- Put your learning into practice by getting co-workers or family members to pose as customers. Encourage them to ask challenging, intelligent questions and ask for their feedback on your answers.

Be Ready for Anything

To be more confident when interacting with others, you need to be prepared for the most common customer situations.

- List the common customer service scenarios (e.g., dealing with angry customers, customers requesting a refund, customers asking for a discount), and write down the steps to handle each situation. If you don't know the right answer, reach out to a senior team member.
- Put your list of scenarios into action by role-playing. Have someone play the role of a customer and ask for their input on how you handled the situation. This will help you to be more confident when you are in a real-world situation.

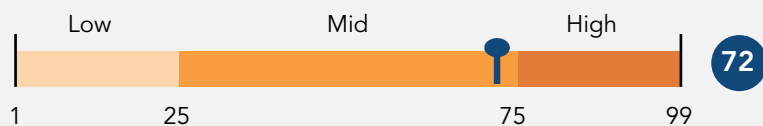
Focus on Mastery Rather than Mistakes

Many people are prevention-focused, meaning they care more about avoiding failure than being successful. This mindset can lead them to avoid taking risks and trying new things.

- Be aware of negative self-talk that might happen after making a mistake. Be conscious of negative thoughts and try to remind yourself that everyone makes errors.
- Accept that mistakes happen, and don't spend too much time thinking about them. Focus instead on learning from your mistakes and improving. Doing so will help you develop a greater belief in your abilities.



Upselling: Involves active strategies to increase value by suggesting additional products and services to customers



Why It's Important

Upselling helps the customer to get more value from your company and helps your company to gain more loyalty and revenue from the customer. If done right, upselling can enhance the customer experience and improve customer relationships.

What Your Score Means

Your score for Upselling falls in the **Mid range**. This indicates that you:

- Are capable of convincing customers to accept your suggestions
- Are likely to recommend products or services according to customer needs
- Sometimes make a successful upsell



Strategies for Developing Your Upselling

Evaluate Customers' Needs

If your suggestion doesn't match the customer's needs at that moment it could cause frustration. Therefore:

- Ask questions before making your pitch, as it focuses the conversation on the customer and allows you to have a discussion centered on their needs.
- Actively listen to your customers, and look for signals that they send, such as their wishes and desires.
- Discover your customer's values and priorities.

Demonstrate Value

Once you discover your customer's needs, you need to demonstrate the value of products and services.

- Use social proof such as positive reviews and testimonials to show your customers the value of your offerings.
- Make upsell relevant to their needs and explain how your offerings can solve their problems.

Build Trust

Building trust with your customer is the key to successful upselling.

- Maintain your confidence while having a conversation with a customer. Confidence is often used as a measure of a person's trustworthiness. Speaking with confidence makes it more likely that customers will accept your advice and recommendations.
- Provide the best help and service to your customer. If you fail to be helpful when they need you, you will have a hard time winning their trust.
- Give your customer a choice. Assure them that they don't have to accept your recommendations. This way they would feel the urge to trust you.

The steps you take toward developing your competencies will help determine your success. Use this step-by-step action plan to help guide you closer to your goals.

Specific
Measurable
Action-Oriented
Realistic
Timely

Qualities

Write up to three overall qualities that you would like to have (e.g., being a confident professional, setting a good example for others, effective stress management). The goals you outline in this action plan should help you achieve the overall qualities you identified.

1. _____
2. _____
3. _____

Competencies

Based on your results, choose up to three competencies to develop (e.g., Practice diligence to develop your Achievement Motivation). The SMART goals that you outline in the template should help to strengthen these competencies.

1. _____
2. _____
3. _____

SMART Table

Goal	Time Frame	Benefits	Measure of Success	Support and Resources Needed	Potential Barriers
e.g., Act with more confidence when interacting with dissatisfied or angry customers	e.g., Role play scenarios once a week to reach goal within three months	e.g., Will become more relied upon by my team and manager	e.g., 30% more likely to reach a positive resolution with customers	e.g., Family, friends, and coworkers who are willing to practice with me	e.g., Not finding the time to practice with others

I commit to this action plan.

Signature _____

This Development Commitment Page is a tool to help hold you accountable for accomplishing the goals outlined in your Action Plan. As we all know too well, our plans for personal growth and development often fall by the wayside when we get engrossed in all our tasks and responsibilities. By outlining your objectives here and leaving a copy with your coach, you are made more accountable to reach your personal goals.

Development Table

Due Date:

My Personal Development Goals

1.	
2.	
3.	
4.	

Your Signature _____

Your Coach's Signature _____

FOR COACHES ONLY

This section will give you a sense of whether the participant responded in a way that affects the interpretation of their scores. There are three ways this is assessed:

1. Time to Completion

This indicator provides the total time the participant took to complete the assessment. In general, the assessment should take between 10 to 15 minutes to complete. It is important to note when this time is very short or particularly long.



The participant completed the assessment in **3 minute(s) and 48 second(s)**. This is a reasonable response time. This indicates they spent enough time to consider their responses when taking the assessment, and they likely completed the assessment in one sitting.

2. Positive Impression

This score assesses if the participant was responding to questions in a favorable manner, more than would normally be expected.



The participant does not demonstrate a tendency toward positive self-presentation, suggesting they were likely responding to questions in an unbiased manner.

3. Consistent Responding

This score assesses if the participant was responding in a consistent manner. For example, if they responded "often" to "I set hard goals", they should respond "rarely" to "I set easy goals".



The responses to the items showed adequate consistency. The participant is not likely to have responded carelessly or in a random fashion.