

MEASURING SALES & SERVICE CULTURE

PERSONAL FEEDBACK AND DEVELOPMENT REPORT

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INTRODUCTION

Measuring Sales and Customer Service Culture (MSC) is a process designed to assist organisations and individuals to enhance their performance in a more systematic and professional way.

This report provides feedback on 12 core sales and service behavioural characteristics that form the framework of MSC. These are:

Maximising Sales Opportunities; Acquiring Knowledge; Thinking Ahead; Relating to Customers; Exceeding Customer Expectations; Providing Information; Understanding Customer Behaviour; Taking Action; Organising Work; Co-operating with Others; Maintaining High Standards and Delivering on Promises.

All the data provided is based strictly on responses from Self or where appropriate, Boss Observer assessment questionnaires.

HOW TO USE THIS REPORT FOR SELF-DEVELOPMENT PURPOSES

The Personal Feedback and Development report identifies how you currently approach the sales and/or service dimension of your role. It describes those behavioural characteristics where more or less emphasis should be given in order to increase personal effectiveness in a variety of business situations.

The report provides a 'snapshot' of the current emphasis given to each of the behaviours. The feedback is based on sales and/or customer service behaviour – not personality. Sales and Customer Service behaviour can be changed or modified; therefore you do have control over your future development and performance in this important area.

The next page shows summary of results with your Self-assessment scores denoted by a number along each scale. Higher scores indicate where you have been focusing your time and energy in the last 3-6 months and low scores indicate the opposite. Often, the priorities within your organisation will determine where you invest your time and energy.

The Benchmarks or shaded area along each scale will assist you to compare your scores with the 'ideal' ranges associated with the role. An overall Development 'Gap' score is also provided which calculates how far your scores are from the centre of each Benchmark range.

Further detailed information is provided on the following pages. The profile gives examples of possible behavioural indicators associated with each score so the results can be anchored to the real 'world of work'.

Development Activities are also provided to enhance performance. Where your profile scores are below the 'Benchmark' range, select one or two actions recommended. These action steps are intended as prompts or suggestions – they are not comprehensive and other ways of helping you to develop may also be appropriate.

If any of your scores are in the high ranges (8-10) it may be necessary for you to adapt your behaviour accordingly. The Development Implications highlighted will assist you to understand the impact high scores may have on yourself and others.

The report may also provide feedback on the 12 behavioural characteristics from the perspective of an individual's Boss. This feedback data provides a different view of how an individual is perceived to operate in their current role.

If Boss data is provided, a solid black line at the bottom of each scale will be shown. Their scores are also included in the overall Development 'Gap' score calculation.

HOW TO USE THIS REPORT FOR COACHING PURPOSES

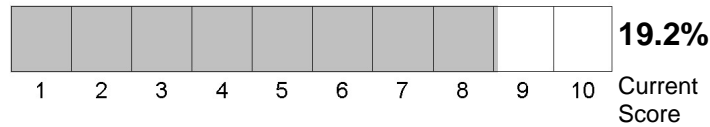
This report provides only one source of information about sales and service performance and it is important to recognise that other forms of evidence will exist. Therefore, the report should be interpreted within this wider context.

Before implementing any of the Development Activities that are based on the results presented here, it is important to check the report and ensure that the information provided is validated by other people's observations.

The report should be used in conjunction with other 'best practices' within an organisation.

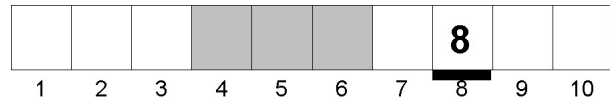
PROFILE SUMMARY

DEVELOPMENT GAP SCORE



Maximising Sales Opportunities

Looking for every opportunity to persuade customers to buy products and services.



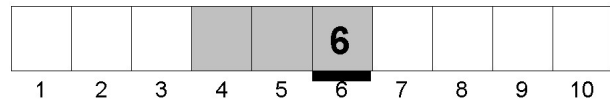
Acquiring Knowledge

Understanding the products and services provided by the organisation



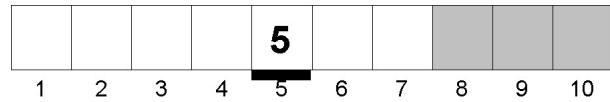
Thinking Ahead

Identifying customer service problems or issues before they arise.



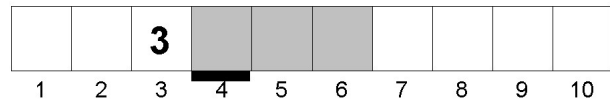
Relating to Customers

Displaying a positive, friendly and informal manner with customers.



Exceeding Customer Expectations

Going beyond customer expectations in terms of the service provided.



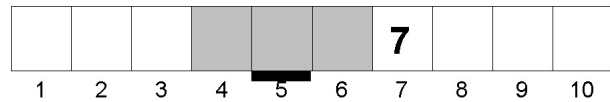
Providing Information

Educating customers about products and services that may be of interest to them.



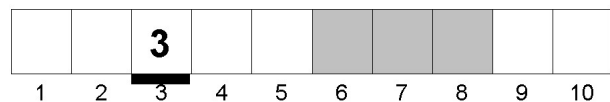
Understanding Customer Behaviour

Analysing why customers behave as they do and adapting accordingly



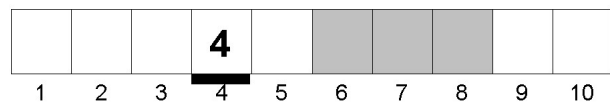
Taking Action

Showing a sense of urgency on behalf of customers and actioning requests quickly.



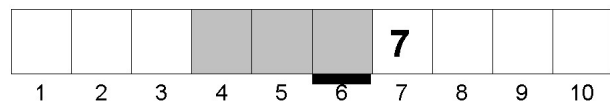
Organising Work

Undertaking work in a well-organised and systematic way.



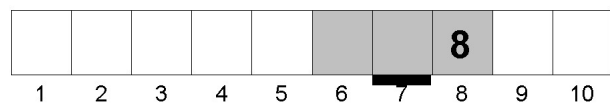
Cooperating With Others

Working effectively with colleagues and other departments.



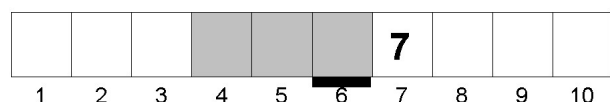
Maintaining High Standards

Striving for excellence by paying attention to important detail.



Delivering on Promises

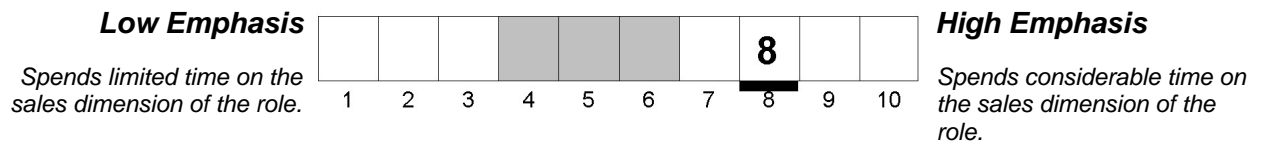
Ensuring promises are kept by following through on customer requests.



MAXIMISING SALES OPPORTUNITIES

Maximising Sales Opportunities:

Looking for every opportunity to persuade customers to buy products and services.



POSSIBLE BEHAVIOURAL INDICATORS:

- Uses strong persuasive skills to increase customer spend.
- Overcomes objections by explaining features and benefits.
- Looks for every opportunity to up-sell, cross-sell or achieve add-on sales.
- Sets personal sales targets in excess of organisational expectations.
- Well-developed commercial skills and knowledge.

POTENTIAL DEVELOPMENT IMPLICATIONS:

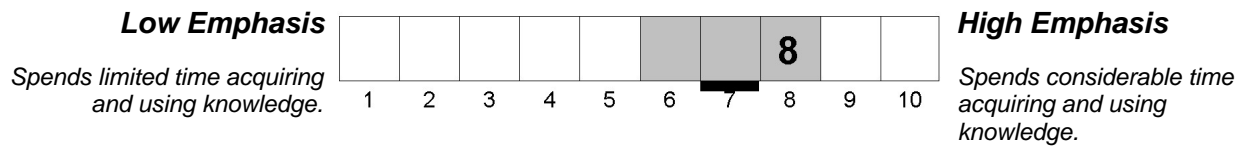
A high score in this behaviour will not generally be detrimental to performance. However, practised excessively there may be some development implications that need to be addressed. For example:

- *You may frighten or alienate customers by being too pushy.*
- *You may lose patience with indecisive customers.*
- *You may neglect other aspects of the role, e.g. customer service or administration.*
- *You may be vulnerable to rejection.*
- *Ask a colleague or your manager to observe you in action and provide you with feedback in these areas so that you can adapt your approach accordingly. Undertake the review on a regular basis as part of your personal development.*

ACQUIRING KNOWLEDGE

Acquiring Knowledge:

Understanding the products and services provided by the organisation



POSSIBLE BEHAVIOURAL INDICATORS:

- Has in-depth knowledge about the organisation and the products and services provided.
- Enjoys the 'kudos' associated with being a technical expert.
- Sought out by others for technical advice or expertise.
- Spends considerable time reading trade journals, magazines, bulletins, specifications, manuals etc.
- Has good knowledge of the industry and the competition.

POTENTIAL DEVELOPMENT IMPLICATIONS:

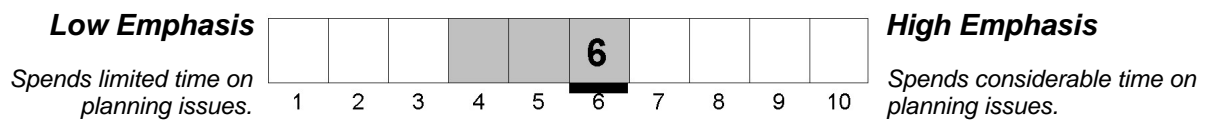
A high score in this behaviour will not generally be detrimental to performance. However, practised excessively there may be some development implications that need to be addressed. For example:

- *You may confuse some customers by overwhelming them with your in-depth knowledge and technical expertise.*
- *You may have a tendency to use 'buzz' words or too much technical jargon.*
- *You may spend too much time learning about products and services and not enough time serving customers.*
- *You may be too externally focused on what is happening outside the department or company.*
- *Ask a colleague or your manager to observe you in action and provide you with feedback in these areas so that you can adapt your approach accordingly. Undertake the review on a regular basis as part of your personal development.*

THINKING AHEAD

Thinking Ahead:

Identifying customer service problems or issues before they arise.



POSSIBLE BEHAVIOURAL INDICATORS:

- Normally anticipates customer service problems before they arise.
- Asks "what if." type questions to identify potential issues.
- Considers most of the various options available.
- Thinks first, doesn't just react.
- Understands where the role fits into the larger organisation.

POTENTIAL DEVELOPMENT ACTIVITIES:

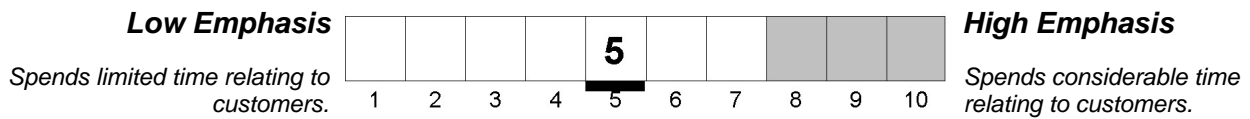
To maintain or increase your personal effectiveness in this behaviour, choose at least one of the actions below as part of your personal development.

- *Develop contingency plans for the most commonly occurring customer service problems or issues. Produce a check list for future reference.*
- *Find out what methods are used by the most successful people in your department. Ask them to show you any techniques or materials they use in the planning process. Implement the best practice and review regularly.*
- *Develop an action plan on a daily, weekly or monthly basis of customer service objectives that need to be achieved. Keep comparing 'actual' versus plan.*
- *Ask yourself 'what if?' questions relating to the provision of customer service. Use this information to develop a plan should problems or issues arise.*
- *Become more disciplined in the planning process by allocating some time on a daily, weekly, monthly basis.*

RELATING TO CUSTOMERS

Relating to Customers:

Displaying a positive, friendly and informal manner with customers.



POSSIBLE BEHAVIOURAL INDICATORS:

- Normally adopts a friendly and informal approach with people.
- Usually makes customers feel at ease.
- Tends to take the initiative to contact customers or engage them in conversation.
- Informal and easy to talk to from a customer's perspective.
- Comfortable when meeting people for the first time.

POTENTIAL DEVELOPMENT ACTIVITIES:

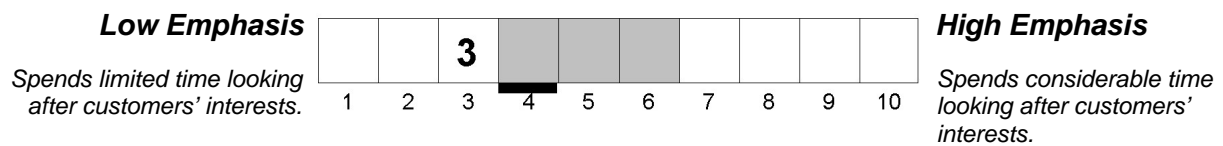
To maintain or increase your personal effectiveness in this behaviour, choose at least one of the actions below as part of your personal development.

- *Speak with a smile and an interested tone of voice. Whatever words you use, if you don't mean what you say your tone will give the impression you are not being genuinely sincere.*
- *Always be polite and courteous irrespective of how customers behave towards you. Put yourself in the customer's shoes to better understand their viewpoint.*
- *Show that you are genuinely interested in the customer as a person. Use their name frequently during your conversation and always remember to thank them for their custom.*
- *Be more aware of the impact you have on people through the different behaviours you display. Ask colleagues to listen, observe and provide you with feedback.*
- *Always admit to your mistakes and apologise. Resist the urge to blame other people, departments or the company policy – let the customer go on believing he or she is dealing with a professional organisation.*

EXCEEDING CUSTOMER EXPECTATIONS

Exceeding Customer Expectations:

Going beyond customer expectations in terms of the service provided.



POSSIBLE BEHAVIOURAL INDICATORS:

- Attentive and responsive to customer needs.
- Works hard to please customers.
- Enjoys the customer service dimension of the role.
- Demonstrates a genuine desire to help customers reach their objectives.
- Recognises the importance of customer service to the organisation.

POTENTIAL DEVELOPMENT ACTIVITIES:

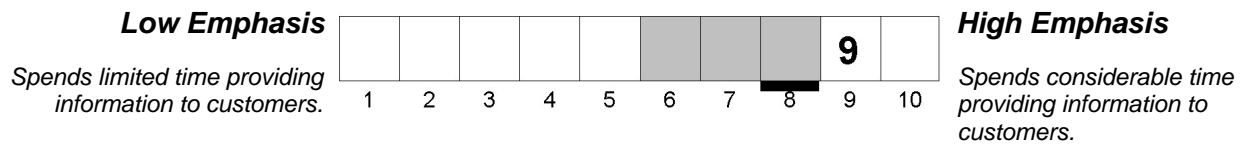
To increase your personal effectiveness in this behaviour, choose at least one of the actions below as part of your personal development:

- *When presented with a problem by a customer, stop and think about it from their perspective rather than how it affects you. This will help you to achieve a better outcome for the customer.*
- *Never say 'No' or tell the customer you 'can't do it'. Always be flexible and look for an alternative solution. Keep a record of recurring problems or issues that you were unable to resolve. Discuss with your manager.*
- *When a colleague has really gone out of their way to help you with an urgent customer request, make sure you acknowledge their assistance. Take time out to say "thank you".*
- *Establish with your company the value of a lifetime customer in terms of potential revenue. Remember that every time you deal with a customer you are influencing thousands of pounds worth of future business.*
- *Let the company know that you are interested in attending any related customer service courses or receiving some other type of development in this area.*

PROVIDING INFORMATION

Providing Information:

Educating customers about products and services that may be of interest to them.



POSSIBLE BEHAVIOURAL INDICATORS:

- Communicates information clearly and concisely.
- Regarded by others as a highly effective communicator.
- Educates customers about the various options available.
- Makes customers aware of new product and service developments.
- Actively encourages feedback from customers on the quality of products and services available.

POTENTIAL DEVELOPMENT IMPLICATIONS:

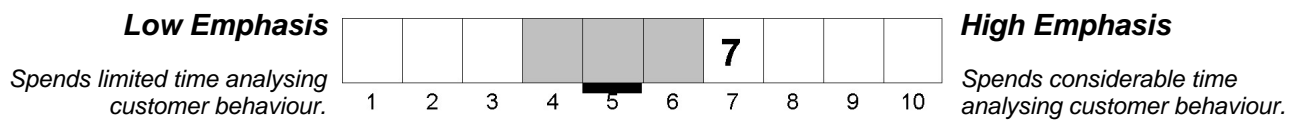
A high score in this behaviour will not generally be detrimental to performance. However, practised excessively there may be some development implications that need to be addressed. For example:

- *You may confuse or over-burden customers with too much information.*
- *You may miss non-verbal cues, especially from those customers who are in a hurry.*
- *You may talk too much when you should be actively listening.*
- *You may invest too much time and energy communicating to others.*
- *Ask a colleague or your manager to observe you in action and provide you with feedback in these areas so that you can adapt your approach accordingly. Undertake the review on a regular basis as part of your personal development.*

UNDERSTANDING CUSTOMER BEHAVIOUR

Understanding Customer Behaviour:

Analysing why customers behave as they do and adapting accordingly



POSSIBLE BEHAVIOURAL INDICATORS:

- Has an active concern for customers' well-being.
- Usually looks for signs that reveal customers' real needs.
- Can be an effective listener.
- Usually a good judge of people.
- Able to adapt to differing customer behaviour.

POTENTIAL DEVELOPMENT ACTIVITIES:

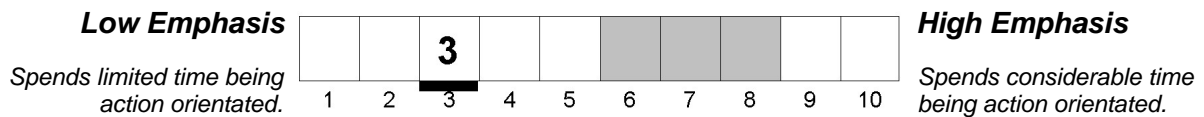
To maintain or increase your personal effectiveness in this behaviour, choose at least one of the actions below as part of your personal development.

- *Learn the basics of non-verbal communication or body language. Facial expressions, gestures, posture, eye signals and body movement all transmit a message. Read popular books on the subject or attend a training course.*
- *Actively listen and be alert to the tone of voice being used. Sometimes it is more important to understand how something is said rather than the message communicated.*
- *Demonstrate to the customer that you empathise with their feelings – irrespective of whether you agree. Don't take their comments personally and avoid being defensive or blaming others.*
- *Always treat customers the way you would like to be treated. Remember, the manner in which you behave towards customers will have a major impact on repeat business and increased revenues.*
- *Start to analyse customers in terms of the way they behave. Develop a list of appropriate actions in response to different types of customer. e.g. complainer, worrier, confused, etc. Role-play with colleagues or friends.*

TAKING ACTION

Taking Action:

Showing a sense of urgency on behalf of customers and actioning requests quickly.



POSSIBLE BEHAVIOURAL INDICATORS:

- May be in a role where speed of service or action orientation is less important.
- Demonstrates some urgency when dealing with routine tasks.
- Likes to think through the implications of issues prior to taking action.
- May focus more on company policies, procedures or regulations than speed of service.
- May be too willing to delegate customer problems or issues for others to deal with.

POTENTIAL DEVELOPMENT ACTIVITIES:

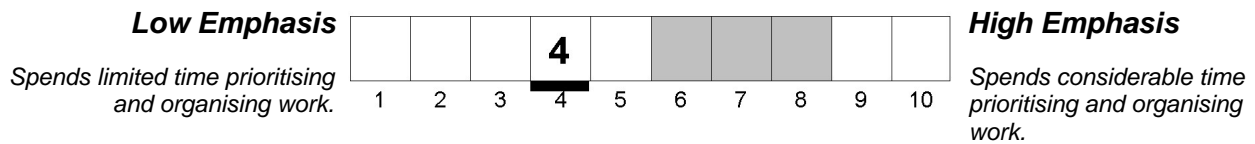
To increase your personal effectiveness in this behaviour, choose at least one of the actions below as part of your personal development:

- *Develop a list of names and contact numbers of people who can help in order to resolve customer problems or issues quickly.*
- *Observe colleagues who are successful in actioning customer requests through demonstrating a sense of urgency. List the 'best practice' used and learn from their example.*
- *Always endeavour to resolve a customer complaint quickly and efficiently. If you do, they tend to have a greater loyalty to the organisation than those who have had no reason to complain.*
- *Think of as many alternative ways of carrying out your role faster which would benefit both the customer and the organisation. Discuss your ideas with your immediate manager.*
- *Save time by understanding your limits of authority when dealing with customer transactions. You may be empowered to make decisions within a pre-defined framework.*

ORGANISING WORK

Organising Work:

Undertaking work in a well-organised and systematic way.



POSSIBLE BEHAVIOURAL INDICATORS:

- Takes an organised and systematic approach.
- Usually understands and utilises policies, systems and procedures.
- Often enjoys dealing with the administrative aspects.
- Normally manages time effectively.
- Knows most of the "right" people in the organisation to contact.

POTENTIAL DEVELOPMENT ACTIVITIES:

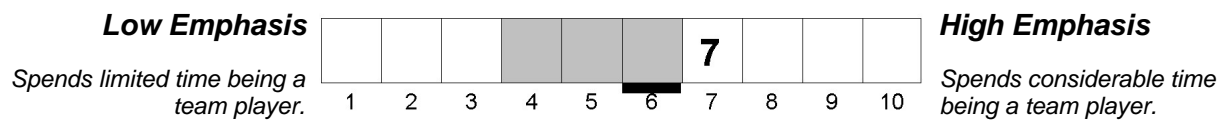
To maintain or increase your personal effectiveness in this behaviour, choose at least one of the actions below as part of your personal development.

- *Develop a system for making sure that you use your time effectively by prioritising your work, e.g. 'A' (action immediately); 'B' (action today) or 'C' (action tomorrow). Repeat morning and evening.*
- *Ensure you understand all the administration and systems connected with your role. Know where the work comes from and goes to so you can support your colleagues' timetables and priorities. Don't be afraid to ask people to explain what they do.*
- *Recognise that your time is your most important asset by placing more value on it. Keep track of how you spend your time and whether you have been productive. If necessary, keep a log or record and discuss any concerns with your manager.*
- *Produce a checklist of everything that needs to be done at the beginning and end of each day. Study the sequence of events to be followed so it becomes routine.*
- *Find out what methods are used by the most successful people in the department. Ask them to show you any techniques or materials they use. Implement the best practice and review regularly.*

COOPERATING WITH OTHERS

Cooperating With Others:

Working effectively with colleagues and other departments.



POSSIBLE BEHAVIOURAL INDICATORS:

- Usually supportive of colleagues.
- Often offers help to others without being asked.
- Tries to consider other people's point of view.
- Contributes effectively to team goals and objectives.
- Usually co-operates with other departments.

POTENTIAL DEVELOPMENT ACTIVITIES:

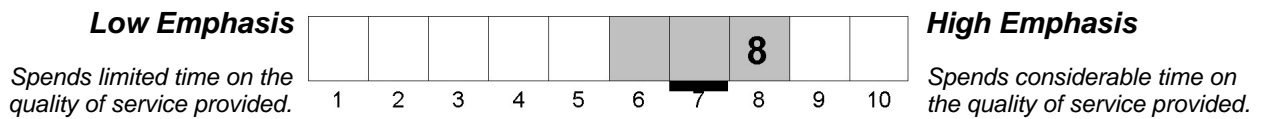
To maintain or increase your personal effectiveness in this behaviour, choose at least one of the actions below as part of your personal development.

- *Recognise that individuals can rarely be effective working on their own. If you go out of your way to help others you can usually call upon their co-operation in the future.*
- *Actively seek ways of understanding what goes on in other departments. By appreciating their problems and issues you will recognise how inter-departmental teamwork contributes to effective customer service.*
- *If you are encountering difficulties working with certain colleagues ask them what actions you can take to improve the situation. Sometimes small misunderstandings can impact on teamwork.*
- *Recognise that achieving your objectives to the detriment of others may not always be the best way. It is sometimes necessary to compromise in order to achieve 'win-win' solutions.*
- *Learn more about 'high performance teams'. Read specialist publications on the subject.*

MAINTAINING HIGH STANDARDS

Maintaining High Standards:

Striving for excellence by paying attention to important detail.



POSSIBLE BEHAVIOURAL INDICATORS:

- Adopts a perfectionist approach to quality and customer service.
- Sets high personal standards for achievement.
- Looks at new and better ways of operating with the customer in mind.
- Takes an active interest in the organisation's customer service performance.
- Proactively seeks customer comments.

POTENTIAL DEVELOPMENT IMPLICATIONS:

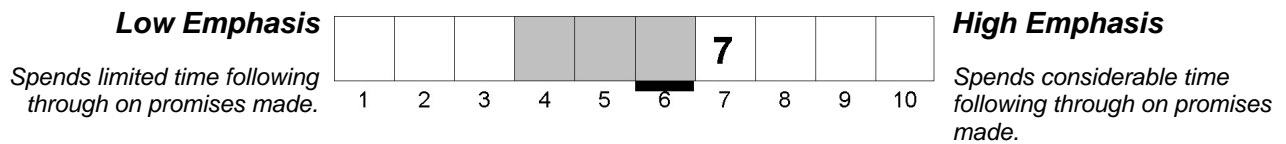
A high score in this behaviour will not generally be detrimental to performance. However, practised excessively there may be some development implications that need to be addressed:

- *You may be unrealistic in terms of what is achievable.*
- *You may not realise the cost implications associated with providing outstanding customer service.*
- *You may be too much of a perfectionist.*
- *You may provide a level of service in excess of what may be required.*
- *Ask a colleague or your manager to observe you in action and provide you with feedback in these areas so that you can adapt your approach accordingly. Undertake the review on a regular basis as part of your personal development.*

DELIVERING ON PROMISES

Delivering on Promises:

Ensuring promises are kept by following through on customer requests.



POSSIBLE BEHAVIOURAL INDICATORS:

- Follows through on most customer requests to completion.
- Normally uses planners, diaries, checklists etc to monitor progress.
- Usually checks with others to ensure they have completed tasks.
- Generally meets agreed deadlines.
- Gains satisfaction from delivering on promises.

POTENTIAL DEVELOPMENT ACTIVITIES:

To maintain or increase your personal effectiveness in this behaviour, choose at least one of the actions below as part of your personal development.

- *Always endeavour to meet your deadlines by keeping track of everything that is happening. Set up a trace system to help you.*
- *Remember, when you make a promise to a customer, it must be realistic, it must be kept and any unforeseen or unavoidable delays notified immediately.*
- *Be persistent and chase other people in the organisation to ensure they have dealt with your requests, especially those that impact on promises you have made to customers.*
- *You will not remember everything, but your organisation and customers will expect you to. Utilise systems that will keep you focused when following through: checklists, diaries, files, logs, computer databases etc.*
- *Let the company know that you are interested in attending any courses on assertiveness training that will assist you when dealing with both internal and external customers.*