

Competency Development Toolkit

Customer Service Representative Benchmark



Signature Profile

Benchmark Profile Description

The Customer Service Representative role is responsible for fielding inquiries and complaints from existing customers in order to promote and/or restore customer satisfaction. They are tasked with treating each encounter as unique, demonstrating concern and empathy for problems without becoming defensive, and for providing solutions.

Predictive Competencies

- Finds Common Ground to Work Well with Others
- Uses Customer Contact to Build Business
- Advocates for Customers to Drive Results
- Keeps Contact with Customers Upbeat and Positive

Finds Common Ground to Work Well with Others

Shows and fosters respect and appreciation for a variety of backgrounds, cultures, values, and perspectives; seeks to understand the views of others; is comfortable accepting the fact that others may not share their personal values; prefers to cooperate in working on mutual goals rather than judge or criticize those who see things differently

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Impose on others the same standards by which they judge themselves ▪ Tends to respond more favorably to those individuals who share similar views, background, or values to their own ▪ Can become locked into own viewpoint and resistant to efforts to change or alter an opinion ▪ Can fail to distinguish how people differ from each other; sees only that they differ from their own beliefs ▪ May attempt to change others' views and opinions to fit own image 	<ul style="list-style-type: none"> ▪ Tolerant of individual views, opinions, and attitudes ▪ Tends to accept people at face value without filtering their words or actions through personal biases ▪ Can embrace their own personal values without imposing them on others ▪ Tries to find common ground with others rather than focus on dissimilarities

Mindset Tips:

- Recognize the value of bringing people together with different perspectives on an issue - those who disagree with you often help push your thinking.
- Acknowledge your colleagues' right to their opinions and positions.
- Realize that dealing with different people is a natural part of doing business.
- Explore others' views sincerely, with an open mind - as you would wish others to explore your views.
- Remember that just because someone's views are different from yours does not make them wrong.
- Commit to listening to conversations without interjecting your own beliefs.
- Strive to recognize the value of every person with whom you come into contact, whether or not you agree with them.
- Make a point to work cooperatively with others, even when differences in opinions or backgrounds exist.
- Resolve not to allow your personal biases to interfere with business interactions.

Success Tactics:

- Actively work with someone who has different values and beliefs so that you can grow to tolerate, if not appreciate, views other than your own.
- Seek out experienced colleagues who are familiar with different people and their unique needs – ask them for advice and pointers.
- Develop strong concentration skills so that you can see beyond the differences that exist between you and others and listen to their viewpoints.
- Make a conscientious effort to listen to differing viewpoints without trying to voice your opinions.
- Rather than automatically resisting viewpoints that are different from yours, actively weigh the pros and cons of their opinions.

Uses Customer Contact to Build Business

Establishes and implements a customer contact process that maximizes opportunities to increase business; commits to telephone contact at the level of frequency needed to sustain customer interest and promote additional product or service opportunities; comfortable taking the lead in a customer contact and maintaining a high profile role that gets the customer's attention

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Prefers to respond to customer requests about additional products or services than to actively solicit new or increased business from them ▪ May lack persistence in sustaining a customer contact process if noncontact activities are more appealing or more pressing ▪ May be timid about taking the lead in customer contacts with the intent to interest them in additional product or service offerings ▪ Counts on a standard process being in place to identify new business opportunities with the customer base 	<ul style="list-style-type: none"> ▪ Takes the initiative in a customer contact process to identify and follow through on opportunities for additional business ▪ Maximizes time spent expanding business opportunities by making customer contact a priority over more administrative or noncontact activities ▪ Keeps a high profile that allows a natural entry into opportunities to satisfy customer requirements ▪ Comfortable taking charge of the contact and leading customers through the steps to a purchase decision

Mindset Tips:

- Accept ownership for fielding customer calls – resolve to view it as your primary responsibility.
- Understand that dedicating time to customer calls not only produces a happy customer, it yields higher sales results.
- View customer calls as a means to servicing customer needs and as opportunities to introduce additional products and services which could be of value.
- Realize that a little extra time and effort can go a long way toward business expansion.
- Learn that it is not enough to field customer calls – you must take control of them in order to make valuable suggestions.

Success Tactics:

- Review your daily tasks and see exactly what is monopolizing your time – work to free up the necessary time to take customer calls.
- Streamline your workday by devising a system by which you can dispense of non-contact activities quickly.
- Find someone who can assist you with administrative tasks so that you can dedicate the time to fulfill customer requests and penetrate customer accounts.
- Resolve to take time in fielding customer calls – putting in even an extra few minutes on a call can uncover additional customer requirements that can be met by your products and services.
- Assume a high profile during contacts in order to gain, and then keep, the customer's attention.
- Challenge yourself to guide customer contacts in order to make suggestions for additional products and services and thereby, expand business.
- Be proactive during customer contacts – explore additional opportunities to satisfy your customers' requirements.
- Ask questions during customer calls so that you can uncover additional customer requirements and then make the appropriate recommendations.
- Develop a script of questions that you can follow in order to unearth additional customer requirements – make suggestions based upon the responses received.
- Do not wait for customers to inquire about additional products or services – ask them questions and make appropriate suggestions.

Advocates for Customers to Drive Results

Consistently achieves above-average sales results by understanding the customer's business, empathizing with their problems and setting a plan to meet their needs; tirelessly focuses on building strong relationships with customers by acting on their behalf to work the seller's internal systems to meet their requirements; sees partnering with customers as the efficient method to reach personal sales career goals

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ May adopt a casual or relaxed approach that fails to project personal dedication to achieving or surpassing sales targets ▪ Can be content with marginal success or lowers goals to reach a level of success that is easier to accomplish ▪ May not sustain the intensity needed to consistently meet or exceed sales objectives ▪ Wants to be successful on own terms without tying efforts or results to effectively fulfilling customer requirements ▪ Achieves results that will support career progression more so than strengthen partnerships with customers ▪ Can be impersonal or detached in approach to the sales process, minimizing the opportunity to build a customer alliance 	<ul style="list-style-type: none"> ▪ Driven to achieve or exceed targeted results and uses sales as a means to get there; hungry to be a top producer ▪ Holds results achievement to a high personal standard ▪ Believes in taking personal responsibility for the level of success achieved ▪ Unwilling to have goal achievement derailed by internal politics or bureaucratic procedures ▪ Promotes a sense of partnering with customers ▪ Takes the first step to establish a trusting relationship that assures customers of a commitment ▪ Genuinely interested in understanding customer needs and works the company's internal systems to satisfy those needs ▪ Collaborates with a network of support resources to satisfy customer requirements

Mindset Tips:

- Understand how setting high standards will aid you in achieving excellent sales results.
- Remember that you are not locked into producing mediocre results – you have leeway in stretching company policy in order to attain customer satisfaction.
- Push yourself to control sales results – working around the system is commendable if the results produced justify your efforts.
- Do not be afraid of ruffling feathers by stepping outside standard procedures – pushing beyond boundaries is what helps a company to grow.
- Just because current procedures will produce mediocre results does not mean that you should think that's the best you can do – challenge yourself to work the system to improve the outcome.
- Remember that any extra effort you expend will be rewarded several times over.
- Remember that customer advocacy is more than solving problems – you need to keep in regular contact with customers in order to obtain their feedback.
- Understand that by forming an alliance with your customers, they will be more apt to purchase from you.

Success Tactics:

- Increase your daily output incrementally – ramp yourself up to the pace maintained by top producers.
- Encourage your customers to share their opinions – listening is a large part of the advocacy process.
- Familiarize yourself with all the internal resources at your disposal – this way, when a customer issue arises, you can remedy it quickly and effectively.
- Schedule regular feedback sessions with customers so they can offer suggestions and comments – implement these suggestions whenever possible.
- Ask customers what else you can do to be of assistance – it conveys your willingness to act on their behalf.
- Work with a colleague who is a strong customer advocate – take note of what this person does to build an alliance with his customers and then implement those tools during your own interactions.

Keeps Contact with Customers Upbeat and Positive

Maintains a positive mental attitude and uses enthusiasm and genuine concern to encourage customers to buy; attempts to make each call an enjoyable experience for the contact; builds long-term relationships which foster repeat business

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Tends to let obstacles or barriers dictate mood ▪ Becomes frustrated or discouraged when things do not work out as planned ▪ Skepticism and wariness in sizing people up may result in selective or limited interaction ▪ Tends to prefer the more solitary aspects of the work ▪ Can leave people with a neutral reaction to what tends to be a rather functional contact 	<ul style="list-style-type: none"> ▪ Genuinely positive and upbeat attitude ▪ Looks for the best in others and does not expect to find a hidden agenda ▪ Focuses externally on how they can help others rather than focus on themselves ▪ Enjoys working with other people and tries to make the interaction pleasing or gratifying ▪ Presents an enthusiastic and agreeable attitude that draws a positive response from others ▪ Communicates openly and easily with people

Mindset Tips:

- The next time an obstacle threatens to have a negative impact on your mood, remember that what we worry about, very seldom comes to pass – analyze past barriers and you'll find that the outcome was rarely as bad as you had anticipated.
- Make cooperation and enthusiasm top priorities – understand that projecting a positive attitude can help you to achieve long-term goals.
- Since being upbeat for its own sake will not be sufficient, find what truly motivates you and use that to as a personal reward for enthusiastic behavior.
- Remember that presenting an enthusiastic and agreeable appearance to your customers will spur them to act in kind. Make the building of rapport with the customer your primary goal.

Success Tactics:

- Organize regular meetings so that you and colleagues can discuss obstacles and vent frustration – very often, being able to sound off about problems is enough to boost one's mood.
- Work with others who seem to be more upbeat – find out what they do to motivate themselves in the face of obstacles and maintain enthusiasm.
- Although a script will appear too rehearsed, prepare a list of responses that you can use during interactions – be sure to vary the wording of your responses so that they always seem fresh.



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