



Development Report

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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.

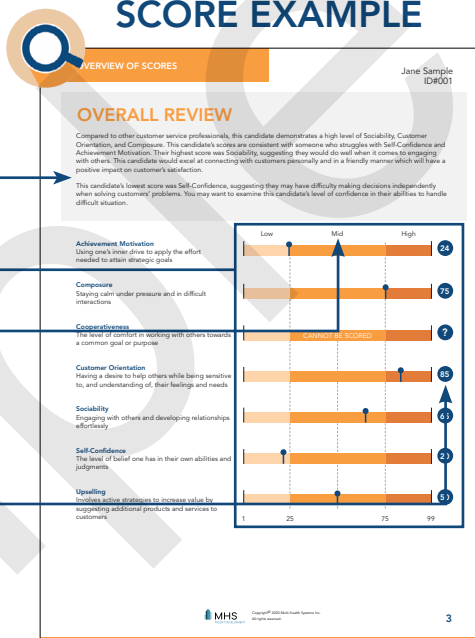
Scores Overview - This section gives a summary of your results.

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



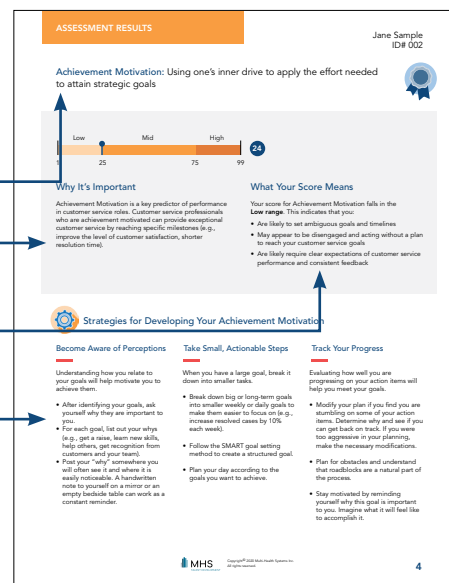
2 Assessment Results

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.

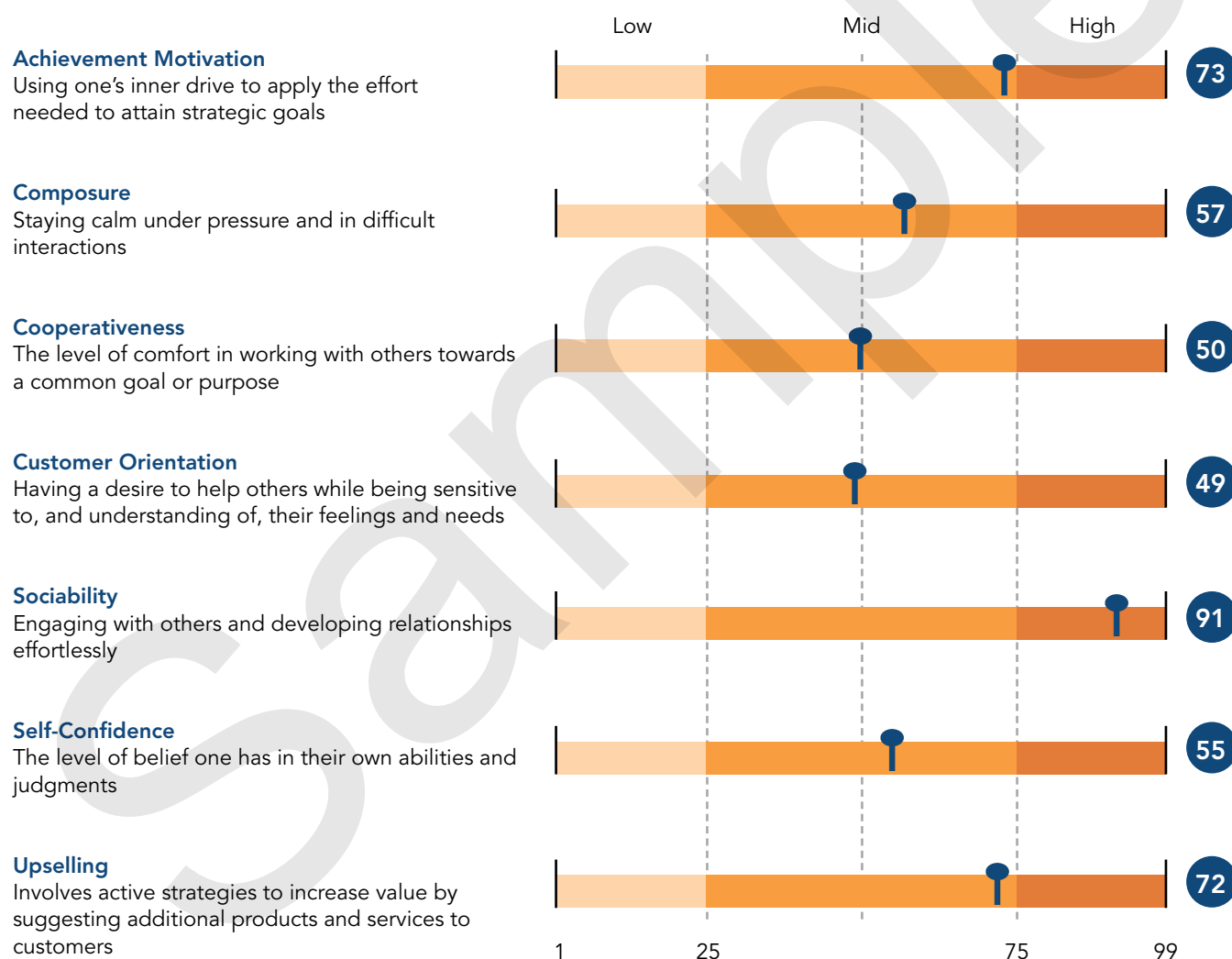
Strategies for Development - This section delivers strategies on how to improve the competency.



OVERALL REVIEW

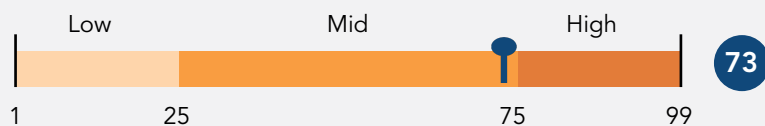
Your results suggest you are likely to communicate with others in a positive, friendly manner. In addition, you are likely to set clear goals and achieve them. Your tendency to develop relationships with customers will foster trust and customer loyalty.

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

- Take time to plan your day ahead of time. This will help you stay organized and focused on your tasks.
- Prioritize your tasks. Focus on the most important tasks first and then move on to the less important ones.
- Take breaks. It's important to take short breaks throughout the day to recharge and stay energized.
- Stay positive. A positive attitude can help you stay calm and focused even in stressful situations.
- Practice deep breathing. This can help you stay calm and focused when you're feeling stressed.
- Stay hydrated. Drinking water throughout the day can help you stay hydrated and focused.
- Get enough sleep. Getting a good night's sleep is essential for staying calm and focused during the day.
- Exercise regularly. Exercise can help you stay healthy and energized, which can help you stay calm and focused.
- Eat a healthy diet. Eating a balanced diet can help you stay healthy and energized, which can help you stay calm and focused.
- Stay organized. Keeping your workspace and your schedule organized can help you stay on top of your tasks and stay calm.

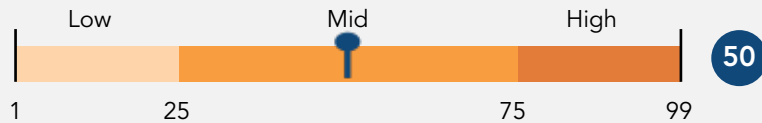
Stay Objective

- Take a step back. When you're feeling stressed or overwhelmed, it's important to take a step back and take a deep breath.
- Stay focused. Focus on the task at hand and don't let your emotions get in the way.
- Stay calm. Remember that you're in control of the situation and that you can handle it.
- Stay professional. Even in stressful situations, it's important to remain professional and courteous.
- Stay patient. It's okay to take your time and to ask for help if you need it.
- Stay confident. Believe in yourself and your ability to handle the situation.
- Stay positive. A positive attitude can help you stay calm and focused even in stressful situations.
- Practice deep breathing. This can help you stay calm and focused when you're feeling stressed.
- Stay hydrated. Drinking water throughout the day can help you stay hydrated and focused.
- Get enough sleep. Getting a good night's sleep is essential for staying calm and focused during the day.

Practice a Healthy Lifestyle

- Exercise regularly. Exercise can help you stay healthy and energized, which can help you stay calm and focused.
- Eat a healthy diet. Eating a balanced diet can help you stay healthy and energized, which can help you stay calm and focused.
- Stay hydrated. Drinking water throughout the day can help you stay hydrated and focused.
- Get enough sleep. Getting a good night's sleep is essential for staying calm and focused during the day.
- Practice stress management techniques. There are many different stress management techniques, such as deep breathing, meditation, and yoga.
- Stay positive. A positive attitude can help you stay calm and focused even in stressful situations.
- Stay organized. Keeping your workspace and your schedule organized can help you stay on top of your tasks and stay calm.
- Stay professional. Even in stressful situations, it's important to remain professional and courteous.
- Stay patient. It's okay to take your time and to ask for help if you need it.
- Stay confident. Believe in yourself and your ability to handle the situation.

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

- Understand the roles and responsibilities of your team members.
- Communicate with your team members to learn about their roles.
- Ask your manager for guidance on understanding your team's roles.
- Observe your team members at work to learn about their roles.
- Read up on your team's roles and responsibilities.
- Ask your team members for feedback on your understanding of their roles.
- Share your understanding of your team's roles with your manager.
- Share your understanding of your team's roles with your team members.
- Share your understanding of your team's roles with your customers.
- Share your understanding of your team's roles with your stakeholders.

Focus on Team Goals

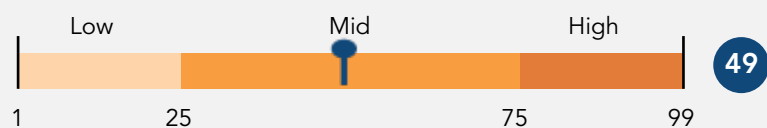
- Understand the team's goals and objectives.
- Communicate with your team members to learn about the team's goals.
- Ask your manager for guidance on understanding the team's goals.
- Observe your team members at work to learn about the team's goals.
- Read up on the team's goals and objectives.
- Ask your team members for feedback on your understanding of the team's goals.
- Share your understanding of the team's goals with your manager.
- Share your understanding of the team's goals with your team members.
- Share your understanding of the team's goals with your customers.
- Share your understanding of the team's goals with your stakeholders.

Stay Connected

- Understand the importance of staying connected.
- Communicate with your team members to learn about the importance of staying connected.
- Ask your manager for guidance on understanding the importance of staying connected.
- Observe your team members at work to learn about the importance of staying connected.
- Read up on the importance of staying connected.
- Ask your team members for feedback on your understanding of the importance of staying connected.
- Share your understanding of the importance of staying connected with your manager.
- Share your understanding of the importance of staying connected with your team members.
- Share your understanding of the importance of staying connected with your customers.
- Share your understanding of the importance of staying connected with your stakeholders.



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

1. Listen actively to the customer's concerns and feelings.

2. Acknowledge the customer's feelings and concerns.

3. Show the customer that you understand their feelings and concerns.

4. Use empathetic language to show the customer that you care.

5. Offer solutions that address the customer's concerns and feelings.

Provide Solutions

1. Offer solutions that address the customer's concerns and feelings.

2. Explain the benefits of the solutions to the customer.

3. Offer the customer a choice of solutions.

4. Follow up with the customer to ensure the solution is working.

5. Offer the customer a guarantee or warranty.

Follow-Up

1. Follow up with the customer to ensure the solution is working.

2. Offer the customer a guarantee or warranty.

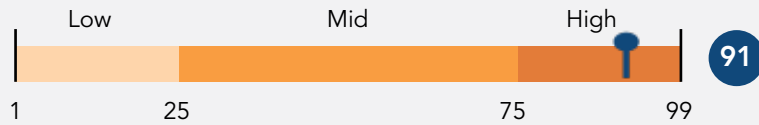
3. Offer the customer a discount or incentive.

4. Offer the customer a referral or recommendation.

5. Offer the customer a testimonial or review.



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

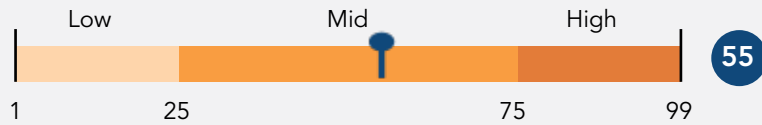
Find Commonalities

Use Positive Communication

Develop a Set of Conversation Starters



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

Understanding your products and services is the first step in building self-confidence. Take the time to learn about the features and benefits of what you are selling. This will help you to answer customer questions and provide better service. You can also gain confidence by practicing your sales pitch and role-playing with a colleague.

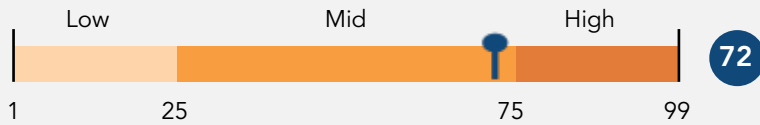
Be Ready for Anything

Being prepared for any situation is key to building self-confidence. Anticipate potential challenges and have a plan in place to address them. This will help you to stay calm and composed when faced with difficult situations. You can also build confidence by taking on new challenges and pushing yourself out of your comfort zone.

Focus on Mastery Rather than Mistakes

Building self-confidence is a process, and it's important to focus on mastery rather than mistakes. Celebrate your successes and learn from your failures. Don't let a single mistake discourage you. Instead, use it as an opportunity to grow and improve. Remember, self-confidence is built over time through consistent effort and practice.

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

Demonstrate Value

Build Trust

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

My Personal Development Goals

Due Date:

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.