

Profile Strategies

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EMPLOYER'S ADVANTAGE

NEWSLETTER

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FROM JIM SIRBASKU'S DESK Eight Questions for Customer-Facing Leaders

If you look at the first illustration in our report, "Six Crucial Behaviors for Customer-Facing Employees," you will see a young woman blithely filing her nails, her back to frustrated customers. The scenario might be an exaggeration, but it vividly illustrates the problem: Employees who ignore customer needs put the organization at risk. Needy customers vanish. By the time leaders realize what has happened, it's too late to repair the damage.

Do you know the two-thirds/one-third rule of business? Our "Six Crucial Behaviors" report makes it simple. Commonly, organizations enjoy two-thirds of their business from existing clients and one-third from new customers. So you'd better make sure the young woman with perfect nails can hustle up lots of new business to make up for the clients she is filing away.

A more productive action would be to hire the right person in the first place—who may or may not be the woman filing her nails. And if she is the best person for the job, your organization can coach her to better—dare we say superb—customer service?

Our report on customer-facing employees identifies six core behaviors for those who face the public, and

discusses each behavior in detail. In addition to examining that list and analyzing your company's record, a bit of self-examination is in order. How do you, as a leader, treat customers?

Some questions for top leaders to ask themselves:

- **Are you establishing relationships with loyal customers** or ignoring them until you need something? Mining a relationship means getting to know your customer's business, and discovering what he needs from you—sometimes before he knows. Teach your employees how to do this and watch your business grow.
- **Are you clear with employees about your expectations and following your own rules?** If you tell workers how you want them to behave with existing customers, then brush off a difficult or demanding customer because you are too busy or just do not want to deal with him, you are sending conflicting messages. Leaders need to walk the walk.
- **Does everyone in your organization know your customer-service attitudes and follow them?** Or do you leave the "duty" of customer service to one department? Everyone who works for your company represents it; this is the way your customers see things, and wise leaders understand this.
- **Do you ask your customers about their experience at your business?** They will tell you, especially if they like your company and see a way to do business with you that makes their experience better.
- **Do you know how to express yourself with tact, even when you disagree with a customer?** Knowing how to state your disagreement with diplomacy is a skill not everyone possesses. Some people can learn it, however. If you, as a leader, have this skill, let others see how *you* use it.
- **Do you treat employees with respect?** They are *your personal* customers, and they respond to others in kind. Remember to listen, to praise in public, and to correct in private. Do you have a system in place that remembers birthdays and anniversaries with the company? Do you treat workers as well as you do your valued outside clients? Cultivating your professional relationship with

(Continued on page 2)

employees produces better attitudes and helps reduce turnover.

- **Do you empower employees to make customer service decisions, or do you require them to get permission from someone else—or from you—before helping a customer?** Train your employees well and they will know what to do. If they make a decision that appeared right at the time but turned out not to be so, treat it as a learning experience.
- **Do you require that customer service issues be resolved pronto, or do you allow them to drag on?** Painful indecision benefits no one. The customer

will be unhappy and your workers will spend too much time on details while ignoring the big picture.

The illustration of the young woman filing her nails while ignoring customers shows an obvious lapse; most customer service issues are more subtle, often hidden from the boss. The happy news is that fixing customer service is not impossible, with the right people on the job, getting the right message from the top.

*Jim Sirbasku, CEO
Profiles International*



"If you get everybody in the company involved in customer service, not only are they 'feeling the customer' but they're also getting a feeling for what's not working."—Penny Handscomb, HR professional

CASE STUDY: How to Retain Employees with CSP

Profiles' clients hear this message repeatedly: **Carefully consider how well an employee's core behaviors fit with the actual job he or she will be performing.** As this case study illustrates, an organization will enjoy the benefits of understanding its workers and replicating the skills of top performers.

Background

Leaders at a financial services organization wanted to increase employee retention. Their solution was to conduct a two-year study with Profiles International to examine the relationship between employee turnover and how strongly candidates matched positions they sought. Customer Service Profile measured this relationship.

First Steps

The organization first developed a Job Match Pattern using CSP. This pattern reflected the company's views on customer service. The Job Match Pattern, which used information gathered from the employer's top performers, reflected the qualities that the organization valued in customer relations. Participants that responded in a similar manner to that pattern implicitly share the organization's belief in customer service and thus are a stronger fit than those who lack the same congruence in responding.

Participants

Leaders at the organization administered CSP to 1,287 candidates and evaluated their Job Match Percent. They described 80 percent or greater score as a strong fit to the job and 79 percent or less as a weak fit.

Next, the financial services organization hired 226 of the 1,287 candidates participating, then monitored their employment status.

Performance Grouping

One hundred sixty-six of the 226 hired obtained an 80 percent or greater score on the Job Match question, and leaders saw them as a strong fit to the job and the organization.

Sixty participants of the 226 obtained a 79 percent or less score on the Job Match question, and leaders saw them as a weak fit.

Next, analysts tracked the turnover figures for each group:

Strong fit employees registered a 36.7 percent turnover rate. (61 of 166 employees)

Weak fit employees demonstrated a 41.7 percent turnover rate. (25 of 60 employees)

Summary

By using the Customer Service Profile to benchmark, select and train employees, the organization realized the ability to successfully predict employee turnover based on Job Match Percent. It reduced by 12 percent its financial burden of filling voided positions, resulting in substantial savings. By using the CSP to increase employee retention, this organization will continue to hire candidates it is likely to retain.

Understanding its people helps an organization:

- Identify those who excel in their role, and then use assessments to discover what makes them tick
- Create a model against which it can match potential employees interested in the same job
- Gain insight as to where employees may be at risk
- Offer specific coaching tips and development suggestions

This pattern now serves as a benchmark for leaders to match to other job candidates and employees at the financial services organization.

POP QUIZ (Answers below.)

Although both answers might appear correct, choose the response that is *most* appropriate for each situation. See below to see how you scored.

1. When talking to a customer who has a concern, an employee should be encouraged to:

- Be a little suspicious of the customer's motives.
- Assume from the start that the customer has honorable motives.

2. Focusing on a problem brought to an organization's attention means:

- The CSR finds the answer to how the problem occurred even if doing so takes several hours.
- Solving the problem takes precedence; the employee may never discover why it happened.

3. Employees who are not naturally empathetic:

- Can fit into a customer service role if team leaders know in advance how to train them.
- Should work in a position where empathy is not required

4. Communicating effectively with customers means that:

- The words an employee says are more important than anything else.
- Facial expressions, tone of voice—even how long someone waits for an answer—are as important as any spoken message a customer hears.

5. Most organizations should search for customer service representatives who:

- Are most like the customers the organization serves.
- Are creative problem solvers, even if a bit untraditional in appearance and behavior.

6. A CSR who has a tendency to follow the rules and is highly diplomatic will best fit in a position:

- At a luxury hotel where the guest's experience is of paramount importance.
- At an airline check-in desk where customers take their problems as a last resort.

7. A loyal customer who returns several times with the same problem:

- Is probably not worth your time.
- Is likely on the verge of taking his loyal business to your competitor.

8. A routine customer service job is best served by the employee who:

- Knows the rules and goes by them without question.
- Is highly flexible.

"Customers complain because they want you to address a perceived shortcoming—not because they don't like you."
—Bud Haney/Jim Sirbasku, founders of Profiles International, in their book *40 Strategies for Winning in Business*

Answers to Pop Quiz:

- b. Encourage employees to focus on finding a solution acceptable to all parties instead of determining whether the issue is valid.*
- b. Team leaders should encourage employees to focus on solving the issue quickly. They can determine later why it happened.*
- Either a or b is correct. People can develop empathy, but those who possess it naturally will fit more comfortably in a CSR role. Assessments help managers determine whose natural tendencies will fit best in a position.*
- b. How an employee says something is just as important as what he says, especially when emotions are involved.*

- a. Know your customers and align your customer service reps with their needs and desires.*
- b. Sometimes legal and safety requirements take precedence over customer desires. Such positions require a person who knows the rules, will follow them, and can tactfully impart this information.*
- b. The stars must be aligned right if the loyal customer has returned ONCE with the same complaint. It means she trusts you enough to give you a second chance. Take it.*
- a. Less flexible people are often better suited for customer interactions that involve routine tasks with clearly defined procedures.*

STRATEGIES FOR WINNING: Getting to Know You*

Success Is All About Relationships

Exceptional products and services, outstanding prices, and excellent service after the sale are no longer a guarantee that your best customers will stay with you. A loyal customer base can be established only through Customer Relationship Management, which requires the conscious focus of the entire company on the development of mutually profitable customer partnerships.

A Personal Story from Jim Sirbasku

One of the things about Profiles that makes Bud and me especially proud is the number of wonderful relationships we have formed with so many people around the world. Bernard Rapoport, a former CEO of American Income Life, a large insurance company, is one of these people. One day, he mentioned he was looking for someone to conduct special training for his salespeople. Mr. Rapoport told me about the specific information he wanted to impart, and it happened to be a subject in which I consider myself something of an expert. I told him I would be delighted to speak to his salespeople.

Agents and managers from across the United States attended the company's next quarterly meeting. My presentation was well received and Mr. Rapoport reported that I received more favorable comments than any of the company's previous speakers. Because of this, I was invited to do the presentation at the company's next annual convention.

I continued to participate in the company's training at their home office as well as regional conferences around the country. During this period, I noticed that the company used more Profiles' assessments. In fact, after every one of my sessions, the number increased substantially. I feel our business was helped because I was able to form relationships with Mr. Rapoport's people. I spent a great deal of time with them and got to know their individual situations and specific problems. This knowledge made it possible for me to relate to the company's independent agents and managers on a very personal basis and learn about their business. I then made specific recommendations of Profiles' products to help them increase their efficiency and sales.

This is a typical win-win situation. The company's agents and managers benefited from the information, and Profiles capitalized on the increased business. All of this happened because of relationships. In business, building relationships builds sales!

Existing Customers—Your Greatest Assets

There are two ways to increase your sales volume:

- Find new customers, and
- Sell more to existing customers

Most companies seem to focus naturally on the first option. Traditional sales training and methodologies historically have focused on selling new business, often to the detriment of the development of existing customers. The reality is, however, that it is usually less expensive and consequently more profitable to sell to an existing customer than to win a new customer, because selling to an existing customer costs less, they will refer you, and they are willing to pay more for the value of time saved and reduced risk

Seven Steps to Better Customer Relationships

Relationship development is generally considered the sole responsibility of individual salespeople. Successful relationships are often deemed dependent upon the personal abilities of salespeople to establish rapport with key individuals in important accounts. This should not be so.

Relationship building can be formally planned and monitored in exactly the same fashion as any sales or marketing campaign—by setting firm objectives for everyone who has any contact within the key customer accounts, and by measuring performance against those objectives. A relationship development program should include action plans to realize the following objectives, at the very least.

Involve Everyone

Make sure that all personnel who interface with customers:

- Know something about each customer's business
- Know the names of key contacts
- Understand the priorities of different customers in terms of the product/services they source from you
- Share the value that you place on your customers' priorities, and portray a partnership approach to addressing them
- Appreciate what makes your organization's products/services so special
- View complaints as a high priority and a chance to excel

However, involving frontline personnel is only half the task. Senior management must also take responsibility for working with account development teams to establish peer level contact in customer accounts. That sort of contact can open doors that

would otherwise remain closed to sales or support personnel, and insulates the account relationship from dependence on a single contact, such as the salesperson.

Know Their Business Inside Out

Team members who have frequent contact within the customer account—sales or support people, for example—best build this level of customer knowledge. Customers will happily provide you with information that makes this awareness possible. Personnel in contact with the account should continually seek input through questions like:

- What are your organizational objectives—short, medium and long term?
- What are your department's objectives?
- What part will you play in meeting those objectives?
- How might the operation of the organization be improved?
- How might the operation of your department be improved?
- What do you view as the key trends in your industry?
- Whom do you consider your main competitors?
- How do you position yourself against these competitors?

Know Them Personally

People make decisions based on who they are. Account teams should seek to understand personal ambitions and objectives—where do their contacts see themselves going in the context of their organizations: What are they trying to achieve? Can your organization be an ally in helping them to meet their personal objectives or career aspirations? Harvey Mackay, a successful entrepreneur who has written several best-selling books, including *Swim with the Sharks*, has a system called the Mackay 55—containing at least 55 pieces of information on every one of his business contacts. The availability of inexpensive, easy-to-use, online customer retention systems makes the collection and management of this sort of information much easier than it has ever been.

Pulse-Check the Relationship Frequently

Account teams must take control of relationship development, continually seeking feedback about how you and your product/services are perceived. Be sure that they are not too afraid to hear what they're doing wrong, or too modest to hear what they are doing right, asking:

- Are we living up to your expectations?
- How can we improve what we are doing for you?
- Is there anything else we should be doing to ensure our position as a favored supplier?

- Is there anyone else within the organization to whom you feel we should be talking?
- Who is your number one supplier of (the same products/services your company provides?) Why?
- How can we become your number one supplier?
- Who is currently providing other products/services that we could potentially supply?
- Why are these suppliers used?
- What should we do to position ourselves for this business?
- What new challenges might we be able to help you meet?

Account teams should listen to what they are told, and be seen to act upon it—feeding back any improvements or changes made because of customer comments.

Be Their Eyes and Ears

Another way to improve relationships with key account contacts is through the unsolicited provision of information relevant to their personal and organizational goals—identifying materials, ideas and news that might be of practical use to them. No one has as much time as he feels he needs to keep up-to-date in today's fast-moving, information-rich business world. Sources include newspapers, industry periodicals and the World Wide Web. Maintain a steady stream of value-added communication with key account contacts. This alone can have a powerful effect in positioning you as a valued partner.

Thank Them—Every Time

It is not possible to overstate the impact of two such small words. Be sure that your customers are aware of the value you place on doing business with them.

Do it Again, and Again, and...

Make customer development an integral part of the way you do business. Ensure that everyone on your team understands the part he must play in maintaining and developing good profitable relationships with your major accounts. When almost every other aspect of your business environment is changing at a rate that makes even medium-term planning difficult, Customer Relationship Management provides a reliable link to a profitable future. Invest in it.

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FEATURE ARTICLE: Become an Employee of Awesomeness

By Megan Bullard

How can one transform from being a regular employee to being an employee of awesomeness?

Recently, the Harvard Business blog "Voices" introduced "The Awesomeness Manifesto" which challenges our ways of thinking about innovation as outdated and encourages searching for what is truly awesome. According to Umair Haque's Manifesto, "awesomeness is the new innovation." While it is easy to see how awesomeness is achievable for businesses and corporations, how does it affect the foundation of the organization: its people? Haque sees four pillars of awesomeness:

- Ethical Production
- Insanely Great Stuff
- Love
- Thick Value

The individual can use all of these in his quest to become an awesome employee.

The topic of ethics can be overwhelming, as it is abstract and largely dependent upon the individual's perspective. To be an awesome employee means to operate ethically, think before acting, set goals, and figure out how to accomplish those goals without cutting corners or walking over others. Cutting corners can accelerate the completion of a project, but it could also accelerate your termination. "Good guys finish last," is an outdated mantra from an era where workers achieve value by cheating others. Embrace the era of awesomeness and strive to be ethically productive; working ethically will immediately gratify you as an individual and your co-workers will notice.

Make insanely great stuff. It is easy to do the bare minimum. What if, instead of accomplishing the norm, you found a way to make it better? This doesn't mean you have to invent the next iPhone. Rather, strive to improve what you do on a daily basis—make it insanely great. Take pride in each task you have to accomplish and exert the necessary energy to do each better than before. It can be something as simple as answering a telephone. Take each call with enthusiasm and willingness to help. Treat any person at the other end of the line as if she deserves your utmost attention. Ignite a change in your business by being the first to make insanely great stuff. Be the catalyst that motivates your business to be one of awesomeness.

Love. Who knew four letters could make all the difference in your awesomeness as an employee? According to Webster's, love is the object of attachment, enthusiasm or devotion. Don't just do your job, love it. Connect with your co-workers, devote yourself to your boss, and be enthusiastic about your company. Loving what you do causes a domino effect of positivity. According to the Radical 1000 Research, 87 percent of people would choose a job they love that reduces their salary by half rather than take a job they hate that triples their current salary. When you care about your job, you are willing to do it with enthusiasm and devotion, and you are ultimately more productive. Loving your job is crucial to being an awesome employee.

The final pillar is thick value. According to the Manifesto, thick value is real, meaningful, and sustainable. Thin value is the "bells and whistles" or unnecessary garnishes people add to appear create the appearance of value. Truly awesome employees don't need obnoxious embellishments because they are genuinely valuable and meaningful to their company. Employees with thick value are considerate and honest. They strive for excellence and ask for help when they need it. They are not overly prideful and work for the greater good of their company rather than for self-promotion.

To have thick value in your job is to do what others are not willing to do. Arrive earlier than expected and stay until the job is done, even if it is after five. Gather all of the information necessary and then find more to add to your credibility. Be knowledgeable, timely, helpful and diligent for yourself, others and the entire business. Thick value brings together the attributes essential to being an employee of awesomeness.

Today's economy has negatively affected the way employees think about themselves, their jobs and the companies for which they work. Negativity is the antithesis of productivity and we should toss it out with our old ways of defining innovation. Now is the time to rid yourself of mediocrity and become something stellar. Make a positive impact on your business, accept the Manifesto, and become an employee of awesomeness.

"You can close more business in two months by becoming interested in other people than you can in two years by trying to get people interested in you."—Dale Carnegie, self-improvement consultant

PRODUCT FOCUS: Use CSP to Keep Your Customers

If supplying customers with good service is not rocket science, why are so many organizations lacking? One reason is that the person who most often meets your customers does not fit his job.

As Profiles' International discovered 22 years ago when it developed the Customer Service Knowledge Scale, not every worker is an ideal candidate for customer service, and some employees just do not naturally possess the knowledge they need to supply your customers with the best possible outcome.

But there are ways to find new candidates who are right for your organization, and to train existing employees in the fine points of customer service the way *you* see it. Profiles' Customer Service Profile offers several options—four versions specific to the areas of healthcare, finance, retail and hospitality, and one general edition for any industry.

As you know from reading Profiles' report, "Six Crucial Behaviors for Customer-Facing Employees," six employee behaviors are necessary for extraordinary customer service. These are trust, tact, empathy, conformity, focus and flexibility. Our report describes each behavior in detail, and the CSP measures each. It also sizes up how closely the candidate's perspective matches your company's customer service policies and attitudes—information that goes to the heart of *your* mission.

Here are the reports employers receive after a candidate takes CSP:

- **The Placement Report.** This offers a Job Match Percentage that tells you how well the candidate measures up to your standards and the degree of alignment between what she thinks and what you expect. The report also contains "Considerations for Interviewing." Whenever the candidate's score misses your customized Job Match Pattern, the report suggests interview questions to stimulate a dialogue. This reinforces your expectations and gives the candidate a clear understanding of them.

- **The Coaching Report.** Even if you know the employee needs coaching, you may not know where to start. This report shows you the areas to work on to obtain the customer service attitudes you want.
- **The Individual Report.** Not everyone can see himself as others see him. This report increases the candidate's self-awareness and helps him follow through with the customer service that contributes to your success.
- **The Company Perspective Comparison Report.** Want to see the differences between your expectations and the candidate's responses side-by-side? Here's your opportunity.

CSP can help conquer the challenges of dissatisfied customers, legal liability, high turnover, and inappropriate messaging about your business. It's so versatile you can use it not only for initial placement, but also as a tool for employee promotion, and for succession planning, coaching and self-improvement.

If you are ready to ensure your customer-facing employees are pointed in exactly the right direction, call us at 800-406-0087. We provide the compass.

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