

Soft Skills Discussion Resource: Building Work-Readiness Competence

The attached material supports the focused development of people's soft skills effectiveness when used with in tandem with AccuVision to legally, validly and predictively measure individuals' effective workplace behaviors.

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AlignMark recognizes that soft skills are developed most effectively when individuals' strengths and skill-deficits are identified through pre-assessment, then developed through various interventions and, finally, when attainment is documented through post-assessment. Our soft skills assessment programs have been used to legally, efficiently and predictively measure the skills of almost 4,000,000 future and incumbent workers.

This Comprehensive Manual provides work-related situations designed to support facilitated discussion about workplace problems. Cues are provided to enable faculty and trainers to raise questions and provide guidance that will help discussion-group participants build their understanding of how employers general want similar workplace situations handled by workers.

Note that the "Question" component of these simulations can be copied and used to help learners build their reading skills.

Simulations from a wide range of industries and jobs are included as indicated on Page 3. Users of these discussion tools are encouraged to adapt the settings and the language when that will made the situations more accessible and/or effective with specific populations, from youth, adults, incumbents, dislocated workers, under-employed and at-risk populations.

Our belief is that the best simulations are those created by instructors for their classes; the following is designed to get you started.

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For additional information on CASAS, please contact Jane Egue: jeguez@CASAS.org

To experience the Internet-delivered Workforce Readiness Skills program, please contact AlignMark Client Services at:

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Dear Instructor,

Your students' eWORKs Profiles, accessible from Teacher Portal, provide scores for eight soft skills, as follows:

PQ1 Integrity

PQ2 Responsibility

PQ3 Self-Esteem

PQ4 Self-Management

PQ5 Sociability

CC1 Customer Relations

CC2 Decision Making

CC3 Commitment to Quality

The scenarios in this Guide are keyed to the same skills. Use your students' scores to select appropriate scenarios from this Guide and provide targeted instruction.

Situations to discuss and build the Skills (and competencies/tasks) measured by AccuVision Workforce Readiness Skill program (WRS).

SKILL: Integrity – You know right from wrong and try to do the right thing.

QUESTION: Assume you are at work and one of your co-workers decides that he wants to leave work 15 minutes early, but does not want the manager to whom you both report to know that he is leaving early. As your co-worker is leaving he explains to you that he is leaving early and asks you to “cover for him” in case your manager comes by and asks where he is. What would you do in this situation?

(Possible probes/additional comments: Assume the Manager comes by and asks you directly where your co-worker is. What would you say? What would you say to the coworker before he leaves?)

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Indicating disagreement with the co-worker’s deceitful actions.
2. Informing the co-worker he/she will not lie to the manager.
3. Indicating that he/she will tell the manager the true story.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Seeing nothing wrong with the co-workers behavior (e.g., it’s not my business).
2. Agreeing to “cover” for the co-worker or play dumb if questioned by the manager.
3. Indicating disagreement with the co-worker’s actions, but a reluctance to state views to the co-worker.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 1
 CC

Tasks/Competencies relevant to the above skills include:

PQ 1.1 and 1.2
CC

SKILL: Responsibility – You work hard to do your job the best that it can be done; you pay attention to details and concentrate even when doing things you don’t like. You try to be on-time for work and work with a positive attitude.

QUESTION: Assume that you work in a large Department Store and that your manager just told you to take your morning break. Your break is only fifteen minutes long and you need to be back at your work station in exactly fifteen minutes. You are on your way to the break room when a customer approaches you and asks you where she can find picture frames. You know that picture frames are on the completely opposite side of the store, in the Home Furnishing section, and are pretty difficult to find. How would you deal with this customer?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Cutting the break short and walking the customer over to the location of the picture frames.
2. Attempting to locate a co-worker who can take the customer to the picture frames.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Telling the customer you are “on break” and cannot help them right now.
 2. Simply telling the customer that picture frames are located in the Home Furnishing section of the store and providing no more direction or suggestions.
- AccuVision® Soft Skills Discussion and Development Resource

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 3.1
CC 1.4, 2.1, 2.3. 2.5, 3.4

SKILL: Self-Esteem – You handle feedback and suggests without becoming defensive, angry or upset. You are not afraid to learn new things.

QUESTION: Assume that you work in a store where you are required to clock into work using a time card. You arrive at work and are on your way to clock in when a customer approaches you and asks for help. After helping the customer for about five minutes, you then go to the time clock to clock into work. Your manager notices that you are a few minutes late clocking into work and politely reminds you that it is important that you get to work on time. How would you deal with your manager?

IF the participant would explain that he/she was late clocking in only due to the fact that a customer was being helped, follow up your question with the following: Okay, then suppose that your manager says that helping the customer was good, but that in the future you need to clock in before you perform any work activities. What would you then say or do?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Initially explaining why he/she was late clocking in vs. indicating he/she would disagree that he/she was “late”, just agreeing with the manager, etc.
2. Seeking additional clarity regarding why clocking in before performing any work activities is important.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Indicating an overly aggressive need to “correct” the manager’s perception that he/she was “late”.
 2. Simply agreeing with the manager’s initial comments and not explaining the situation (e.g., “whatever”, etc.).
 3. Asking no questions regarding why clocking in first is important.
- AccuVision® Soft Skills Discussion and Development Resource

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 3
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 3.1
CC 1.4, 2.1, 2.3. 2.5, 3.4

SKILL: Self-Management – You are aware of what you can and cannot do and you are not afraid to ask for help when you need it; you try to get better at things that you do not do well.

QUESTION: Assume that you work in a company that does commercial printing. Your supervisor asks you to show a new employee how to operate the large hole-punch machine in the shop. You know a little about the hole-punch machine from having seen other employees operate it a few times, but you have never actually operated it yourself. How would you handle the situation with your supervisor?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Candidly informing the supervisor of own knowledge and experience with the equipment.
2. Asking the supervisor to be trained on the equipment at the same time as the new employee.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Accepting the assignment and attempting to simply do “the best you can”.
2. Simply suggesting the supervisor have someone else do the training activity, since he/she is not very familiar with the equipment.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 4 and 2 and 3 CC 2
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Tasks/Competencies relevant to the above skills include:

PQ 2.3, 3.2, 4.2 CC 2.4

SKILL: Sociability – You are understanding, friendly, flexible and polite when you are around co-workers and/or others. You participate in what is going on instead of trying to be invisible. You get along with others and you take an interest in what others say and do.

QUESTION: Assume that one of your co-workers, with whom you are somewhat friendly, is currently undergoing a divorce and often wants to talk with you about personal problems he is having because of the divorce. However, the supervisor that both you and the co-worker report to has told you that he (the supervisor) believes you and the co-worker have tended to spend too much time talking and need to pay more attention to your work. How would you deal with your co-worker?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Indicating an awareness and potential willingness to use non-work time (i.e., breaks, lunch time, after work hours, etc.) for such discussions.
2. Recognizing the need to inform the co-worker of the need to decrease personal conversation time in a sensitive manner.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Overreacting – i.e., telling the co-worker “I can’t talk to you any more”, etc.
2. Dealing with the co-worker in an insensitive manner – i.e., your problems are getting me in trouble, etc.
3. Suggesting the supervisor talk to the co-worker directly about the problem – i.e., it’s the co-worker, not me that always wants to talk, etc.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 5 (and also 2, 3)
CC

Tasks/Competencies relevant to the above skills include:

PQ 2.1, 2.5, 3.1, 5.1, 5.2
CC

SKILL: Decision Making – You make sound decisions when carrying out company policies and guidelines, develop solutions for customer problems, recognize the limits of your authority and know when a customer problem should be referred to others.

QUESTION: Assume you are working and a customer comes to you and wants to return a product she purchased three months ago from your store. You know that your store’s policy is that all returns must be made within 30 days of purchase unless the product is defective. In situations where the product was purchased more than 30 days ago, but is being returned because it is defective, only a supervisor can approve the return. What would you do and say to this customer?

INTERVIEWER NOTE: (If the participant says that he/she would ask the customer why he was unhappy with the product, ask the following question.) Suppose the customer says he wants the refund because he just hasn’t had as much use for the product as he thought he would. What would you do?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Questioning the customer to determine the reason for wanting to return the product.
2. Attempting to handle the problem without involving the supervisor – the situation is unambiguous.
3. Recognizing that accepting the return would be inappropriate.
4. Apologizing for any inconvenience caused to the customer.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Explaining the return policy to the customer prior to asking why the customer wants to return the product or not asking why the customer wants to return the product.
2. Explaining that only a supervisor can approve the return or deferring the matter to a supervisor without attempting to first handle the situation himself/herself.
3. Simply telling the customer “no” or “it’s against policy” without explaining the policy.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ CC 2 (and 3)
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Tasks/Competencies relevant to the above skills include:

PQ CC 2.1, 2.5, 3.5

SKILL: Customer Relations – You communicate in a positive manner, especially when handling complaints or conflicts; efficiently obtains additional resources as required to satisfy customer needs.

QUESTION: Assume that you work as a customer service representative for a utility company. A customer calls you and explains that she just received a notice from your company informing her that her monthly payment is two weeks late. She explains that she is absolutely certain she mailed her check for the payment to your company more than two weeks ago. You check your computer and see that the payment has not yet been received, but you also see that she has been a customer for three years and has no other late payments. The customer is concerned that a late payment will hurt her credit rating and wants the situation cleared up as soon as possible. What do you tell her or suggest to her, and why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognizing that the customer’s excellent past payment record and the fact that she called the company gives some credence to her statement regarding she has mailed payment – she should receive some special consideration.
2. Attempting to put the customer at ease regarding the issue of the credit rating – e.g., can take steps to ensure that a late payment does not show up on payment history.
3. Suggesting the customer contact her bank to determine if the check has cleared, then call you back with the information, suggests giving the payment another week to show up and offering to waive any late payment fees, etc.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Takes a “tough” position (e.g., it’s two weeks late so you need to write another check and your account will now show a late payment) or a “helpless” attitude (e.g., your payment is late and there’s nothing I can do).
2. Failing to recognize the relevance of the customer’s good payment history to the overall situation.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ
CC 1.4, 2.1, 2.5, 3.1, 3.3, 3.5

SKILL: Commitment to Quality – You work and communicate with clients and customers to satisfy their expectations; actively listen to customers to avoid misunderstandings. (NOTE: Customers are both internal and external.)

QUESTION: Assume that you are a Bank Teller. It is a slow day inside the bank and your manager asks you to close your teller window and work on some paperwork that has accumulated over the past few days. However, the manager also tells you not to worry if you can't finish all of the paperwork today, since it is not due to corporate headquarters for several more days. After a little while, things begin to get pretty busy inside the bank and a long line of customers are waiting to see the Tellers and the line is continuing to grow. Unfortunately, the manager has gone to lunch and there are no other Tellers available to help. What, if anything, would you do?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognizes from the description that the paperwork is not urgent and can be delayed for a few hours if needed.
2. Indicating a willingness and desire to help the co-workers (even if he/she is reluctant to actually change activities without the manager's permission).
3. Taking the initiative to stop working on the administrative task and reopens his/her Teller window in order to assist customers.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Indicating a lack of concern for the customers' satisfaction – i.e., I'm doing what I was told to do.
2. Is reluctant to act without permission.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ
CC 1.3, 2.2, 2.3, 3.1, 3.2, 3.4

Additional Simulations follow that address the Skills (and competencies/ tasks) measured by AccuVision Workforce Readiness Skill program (WRS)

Note: The following scenarios take place in an **OFFICE ENVIRONMENT** and are taken from our Office Success Skills program. Even so, they directly relate to Skills address by WRS.

QUESTION: Assume that your manager is out of the office for the next two days and that the following situation occurs. Late in the afternoon, you receive a phone call from an important customer who explains that your manager promised to provide a special report to him no later than today, but that he hasn't received it yet. He then begins to get angry and starts talking about how important the report was and how irresponsible your company has been. You know that you don't recall your manager mentioning anything about sending a report and you're fairly sure that no report has been sent. How would you respond to the customer and what actions would you now take?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Allowing the customer to vent his frustrations in order to diffuse the situation and attempt to calm the person.
2. Apologizing for the inconvenience and showing empathy for the person's situation.
3. Questioning the customer to determine exactly what he requires.
4. Attempting to contact the manager in order to determine the facts surrounding the situation and follow-up actions that are required.
5. Telling the customer that you will call him back ASAP to provide an update on the situation.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to apologize/show empathy for the customer's situation.
2. Failing to take ownership for the problem/situation (e.g., asking questions to determine what's needed, volunteering to contact the manager, etc.).
3. Failing to follow through by offering to call the customer back and update him on the situation.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.3, 2.5
CC 1.1, 1.2, 1.4, 2.4, 2.5, 3.1, 3.5

QUESTION: Assume that the following situation occurs. The manager to whom your immediate superior reports comes by your desk and asks you for some cost information on a project with which your manager is involved. When you ask what cost information she needs, she says that she discussed it with your manager yesterday and that your manager told her you would pull it together and give it to her today. In reality, you know that your manager didn't mention anything about this to you, but that you can get the information together in about a half- hour. How would you respond to the person at your desk?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Refraining from indicating that the manager failed to mention the issue to you.
2. Indicating that you have not yet completed the task, but will do so shortly.
3. Following up with your manager to clarify the exact information needed, etc.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Indicating no knowledge of the required task.
2. Directly stating your manager failed to make any mention of the task to you.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2
	CC 1, 2

Tasks/Competencies relevant to the above skills include:

PQ 2.3, 2.4
CC 1.3, 2.2

QUESTION: Assume that one of your manager's staff members comes to you and asks to see the manager. You explain that the manager is out of the office and that you don't expect him back for several hours. The staff member becomes very annoyed and explains that she had scheduled an appointment with the manager for a meeting. You look at your appointment book and see that the staff member is correct. How do you handle the situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Acknowledging the inconvenience and apologizing for the mix- up.
2. Offering to reschedule the meeting once the manager returns and contacting the staff member with a new time ASAP.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to respond to the staff member's feelings.
2. Simply asking the staff member to contact the manager later in the day to reschedule the meeting.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.3, 2.4
CC 1.2, 2.4, 2.5, 3.2, 3.5

QUESTION: Assume that yesterday your manager explained that the organization is about to start selling a new product, but asked everyone to refrain from saying anything about it to anyone outside the company until the planned marketing campaign begins in one week. Today you receive a phone call from an important customer who states that your manager discussed the new product with him last week and said that he could call you to get pricing information. Your manager is not immediately available to talk with the customer because he is out on a two-day business trip. How would you handle the situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Explaining to the customer that you do not have the information at this time.
2. Offering to provide the information as soon as it becomes available and informing the customer that you will call him in the near future to let him know when to expect the information.
3. Contacting your manager to explain the situation and determine what, if any, additional actions may be desirable.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Providing information about the new product or telling the customer you know nothing about a new product.
2. Simply taking a message to give the manager upon his return.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2. 4
	CC 1, 2

Tasks/Competencies relevant to the above skills include:

PQ 2.3. 4.2
CC 1.3, 2.1, 2.3, 2.4, 2.5

QUESTION: Assume the following situation occurs. It's mid-afternoon and you are working on several different assignments that your manager asked you to complete today. You will barely be able to complete these assignments by the end of the normal work day. On your desk you now find a note from your manager asking you to do a large amount of photocopying before the end of the day. You know that this task will take two or three hours of time and that no one else is available to help you. How would you handle the situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Demonstrating a willingness to work late, if necessary, in order to complete all of the activities.
2. Reviewing the different work activities with the manager to determine their relative importance and/or reassess the need for each to be completed today.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Attempting to prioritize the activities without seeking the manager's guidance.
2. Assuming that all activities needed to be completed today without seeking the manager's guidance.
3. Demonstrating a reluctance to work late, if needed, to complete all of the work.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2. 4
 CC 2

Tasks/Competencies relevant to the above skills include:

PQ 2.3. 4.2
CC 2.1, 2.3, 2.4, 2.5

QUESTION: Assume that you are responsible for providing support services to three different staff members, plus the manager to whom you directly report. One of the staff members has complained to you that over the last couple of months he doesn't feel he's getting as much of your time as the other staff members and asks you to develop a plan to address the issue. After giving the issue some thought, you conclude that his complaint is somewhat justified, in that over the last two months some of the other staff members have needed more of your time than usual because of their involvement in some high priority projects. How would you deal with the situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognizing that the issue can likely be handled in an informal manner, rather than attempting to formalize some type of work arrangement (i.e., a fixed and set number of hours per week provided to each staff member).
2. Recognizing that if any more formalized arrangement were to be made, all affected parties would need to be involved in the discussion and decisions.
3. Attempting to respond to the feelings of the staff member (i.e., he may feel slighted) by explaining that the situation is a temporary one.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Viewing the issue as a major problem that requires significant action.
2. Making decisions about changes without consulting the affected parties.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2. 3
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.4, 3.1
CC 1.3, 2.2, 2.5, 3.4, 3.5

QUESTION: Often times you'll be faced with competing demands that force you to establish priorities. What factors would you consider when determining the priority of different work activities that confront you?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognizing that an activity's "importance" is different from its "urgency" and that both must be considered when establishing its priority.
2. Recognizing that an activity's "importance" can be defined in a variety of ways (e.g. operational considerations, political considerations, etc.).
3. Recognizing that establishing priorities involves a relative comparison of competing demands.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Demonstrating an inability to identify meaningful factors for determining the relative priority of competing work demands.
2. Viewing all demands as equally important.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2
	CC 1, 2

Tasks/Competencies relevant to the above skills include:

PQ 2.3
CC 1.3, 2.1, 2.2, 2.4, 2.5

QUESTION: Assume that your manager has asked you to set up hotel accommodations for a two-day meeting she will be conducting with a group of 15 out-of-town managers. After gathering information concerning room needs, meals, etc., how would you go about making arrangements with a local hotel to set up the meeting?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Stressing the need to provide detailed instructions in writing to hotel personnel regarding all requirements.
2. Stressing the need to personally meet with hotel personnel to review facilities and plans prior to actual meeting date.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Simply handling arrangements over the phone and "assuming" that arrangements will be carried out as planned.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 3, 4 CC 2
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Tasks/Competencies relevant to the above skills include:

PQ 3.2 4.2
CC 2.2, 2.5

QUESTION: Assume that you're responsible for generating a weekly activity report for your manager that summarizes the work activities completed by the staff. In order for you to prepare the report and submit it to your manager in a timely manner, each staff member must give you a list of his/her work activities each Monday morning. Further assume that a relatively new employee has been somewhat reluctant to give you the needed information in a timely manner. When you attempted to discuss the issue with the new employee, he became defensive and said that he thought the paperwork was a waste of time and that he didn't want to be bothered with it. How would you deal with such a situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Attempting to personally deal with the problem.
2. Explaining the importance and need for the report.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Asking the manager to take care of the issue, without attempting to deal with it personally.
2. Threatening the employee by implying that the manager would become involved if compliance was not forthcoming.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.5, 5.1
CC 1.1, 1.2, 2.2, 2.3, 2.5, 3.2, 3.5

QUESTION: At times you may be responsible for changing office procedures to improve work flow, etc. As you think about making changes to office procedures that have been in existence for long periods of time, what actions would you take to ensure that new procedures are accepted and followed by the rest of the staff?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Explaining the reasons for changing a procedure to all affected.
2. Requesting input from all persons affected by the change in order to increase acceptance, identify the best possible solution, etc.
3. Monitoring the acceptance/compliance of newly implemented procedures to identify potential problems, reduce confusion or misunderstanding, etc.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to identify reasons for change in advance of implementation, which would have increased the likelihood of the new procedure being accepted by office personnel.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.4. 3.2. 4.2. 5.1
CC 1.1, 1.3, 2.2, 2.3, 2.5, 3.1 3.2, 3.5

QUESTION: Conflicts will occasionally occur in any setting where you work closely with others. Assume that one of your co-workers is frequently late providing you with information you need to complete a regular work activity. As a result of receiving the information at the last minute, you constantly have to scramble to meet your own work deadlines. How would you deal with the situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Demonstrating a willingness to personally deal with the problem.
2. Specifying problem/issue clearly (e.g., by describing how problem affects you, giving relevant examples of co-worker's problem behavior, etc.).
3. Attempting to create/maintain a constructive atmosphere during discussion by focusing on performance issues rather than "personality" differences, asking for comments/feedback instead of simply lecturing the person, etc.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Taking the problem to the manager without first attempting to deal with it personally.
2. Adopting a punitive or threatening attitude toward the co-worker.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 3, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 3.1, 5.1
CC 1.3, 2.2, 2.5, 3.2, 3.5

QUESTION: Assume that the following situation has occurred. In the past, you regularly performed a certain work activity for each of the staff members in your area. However, several weeks ago your manager decided that each of the staff members would perform this activity for themselves. As you would expect, from time to time you've had to help a few of the staff members in doing this activity until they became more familiar with it. However, there is one staff member who, on a couple of occasions, has required considerable assistance and appears reluctant to learn to do the activity independently.

Now assume that this same staff member comes to you and states that he needs you to do the activity for him. He states that he has several things he needs to get done right away and he doesn't have time to take care of it himself. Assuming that you have the time available to do it for him, how would you deal with the situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Offering to "help" the staff member, rather than simply doing the activity for him.
2. Offering to provide the staff member with some additional training at a later time.
3. Taking ownership for resolving what is becoming an on- going problem, rather than involving the manager.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Agreeing to the request and/or failing to turn the request into a learning experience (e.g., by offering to train him).
2. Simply assuming an "it's- not-my-job" attitude and offering no assistance.
3. Asking the manager to assist in resolving the larger scale issues with the staff member's reluctance to perform the activity.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.4, 2.6, 3.1, 5.1
CC 1.1, 1.3, 2.2, 2.3, 2.5, 3.1 3.3, 3.5

Additional Simulations follow that address the Skills (and competencies/ tasks) measured by AccuVision Workforce Readiness Skill program (WRS)

Note: The following scenarios take place in a **RETAILING ENVIRONMENT** and are taken from our Office Success Skills program. Even so, they directly relate to Skills address by WRS.

QUESTION: Assume you are working in the shoe department when you see a customer looking at the shoe displays. The customer appears confused by the large selection of shoes and continues to take shoes off the display stand, look at them, and put them back. As you approach the customer, you overhear him say that he doesn't shop for shoes very often and doesn't know where to begin. How should you handle this situation? Why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Emphasized the need to ask the customer open-ended questions in order to obtain an understanding of the customer's specific needs and concerns (e.g., what style of clothing the shoe will be worn with, shoe size, price range, color, etc.)
2. Recognized the need to match the customer's needs with the proper product.
3. Suggested asking the customer if there were any additional products that he needed help finding/choosing (laces, polishes, socks, etc.).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Recommended choosing/suggesting a product without finding out what the customer's needs were first.
2. Suggested showing several products rather than helping the customer make a decision based on his/her needs.
3. Failed to see the importance of offering additional assistance without being asked.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.4, 2.6, 3.1, 5.1 CC 1.1, 1.3, 2.2, 2.3, 2.5, 3.1 3.3, 3.5

QUESTION: Assume the following situation occurs. You are working in the cosmetics department when you see a male customer browsing the perfume counter. The customer appears confused with the large selection of perfumes and keeps looking at the perfume boxes and smelling the samples. As you approach, he looks uncomfortable and tells you that he has never shopped for women's perfume before and does not know what to buy. How should you handle this situation? Why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognized the need to ask questions to obtain specific information (e.g., determining the end use/user for the product, obtaining feedback on the product from the customer, etc.).
2. Emphasized the need to assist customer in narrowing the range of choices (e.g., determining preferred price range, determining preferred brand, etc.).
3. Recognized the importance of restating the customer's needs/concerns and making sure their understanding was correct.
4. Recognized the need to match the customer's needs with the proper product.
5. Suggested asking the customer if there were any other products that he needed help with, or if he was interested in any additional store services (e.g., gift-wrapping, greeting cards, etc.).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Recommended "pushing" a perfume product without first identifying the customer's needs.
2. Suggested showing products instead of helping the customer make a decision based on their needs.
3. Did not recognize the need to avoid asking "yes" or "no" type questions and did not emphasize the need to get much information from the customer.
4. Failed to recognize the need to encourage the customer to ask questions.
5. Failed to acknowledge the importance of offering additional store services without being asked.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.4
CC 1.4, 2.2, 2.4, 3.1 3.3, 3.5

QUESTION: Assume you are working in the electronics department when you see a customer looking at the television sets. The customer appears confused by the large selection of televisions and continues to examine many of them. As you approach the customer, he asks you to explain the features and benefits of four of the televisions. Briefly, describe what you would do in this situation.

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognized the need to ask questions to obtain specific information (e.g., determining the end use/user for the product, obtaining feedback on the product from the customer, etc.).
2. Emphasized the relationship between the features/benefits of the products to the customer's needs and preferences.
3. Demonstrated the importance of locating and making use of all available product information.
4. Demonstrated the importance of explaining features and benefits of different products clearly, and did not use terminology that the customer would probably not understand.
5. Recognized the need to assist the customer in weighing different factors to make their decision using terminology that the customer would understand.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Recommended choosing/suggesting a product without assessing the customer's needs first.
2. Suggested several products rather than helping the customer make a decision based on his/her needs.
3. Incorrectly addressed product questions without having the appropriate level of knowledge of their features and benefits - rather than making use of all available product information.
4. Incorrectly explained features and benefits of different products using terminology that the customer wouldn't understand.
5. Inappropriately biased the customer's purchasing decision based upon his or her own preferences rather than assisting the customer with weighing their own factors.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.3, 2.4
CC 1.1, 1.3, 2.2, 2.3, 2.5, 3.1 3.3, 3.5

QUESTION: Assume you are working in the exercise equipment department when you approach a customer looking at treadmills. The customer seems to have found a treadmill she's interested in, but tells you she doesn't know how she's going to get it home in her car. You explain that your store has a delivery service and that the treadmill could be delivered in a week. As the customer is paying for the treadmill, she tells you that she works during the day, but does not work far from home. She asks if you could call and let her know about an hour before the delivery will arrive, so she can meet them at her house. What would you say to this customer and what actions would you take?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Responded in such a way that he/she gave the customer an indication that the request would be made.
2. Responded that he/she would make a note on the delivery request to have her called an hour before delivery.
3. Suggested initiating follow-up procedures (e.g., offering to call the delivery department to make sure everything is on schedule, then call customer back, etc.)
4. Suggested follow-up procedures with the customer after the scheduled delivery time.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failed to respond in such a way that would give the customer an indication that the request would be made.
2. Failed to express personal commitment to follow-up with the customer (e.g., giving the customer the delivery department number to call themselves).
3. Failed to make a note to the delivery department regarding the customer's request.
4. Responded in such a way that he/she failed to give the customer any indication of when or if their request could be met.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.4, 2.6, 3.1, 5.1
CC 1.1, 1.3, 2.2, 2.3, 2.5, 3.1 3.3, 3.5

QUESTION: Assume the following situation occurs. You are the only person working in the infant and children section in your store and it's been busy all day. There are several customers at the register waiting to be helped. An elderly woman is next in line. She tells you that she is shopping for her three grandchildren and is not sure what size to buy for them although she does have their ages and weights written down. She asks you to explain how both infant and children's clothes are sized so she can make sure to buy the right items. She looks at you apologetically and says, "I know there is a sizing chart right here, but I have forgotten my glasses and cannot be sure that I am reading it correctly, it's kind of hard to follow". Keep in mind that the chart is fairly simple and the writing is fairly large. How should you handle the situation and why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognized the need to offer high quality service even when faced with increased workload/time pressure (e.g., other customers at the register waiting, been busy all day).
2. Recommended taking the time to provide the necessary service (i.e., explaining the size chart and finding the correct sizes needed), or suggested that the customer be shown how to read the chart so that it could be utilized in the future as her grandchildren continue to change sizes.
3. Emphasized the need to tell other customer that they would be assisted as soon as possible and recognized the need to maintain an awareness of customer wait time in order to prevent the loss of potential sales.
4. Suggested the need to try to contact another co-worker from a different department who is not busy and could help assist customers in your department.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Suggested apologizing and telling the customer that due to the line of customers he/she would be unable to provide the requested information.
2. Recommended the customer be told that the chart is not that complicated and that she should read the instructions printed on the chart.
3. Recommended that the customer be asked to find the items she wanted to buy and that he/she would get her the right sizes later after the other customers had been helped.
4. Suggested that he/she would call supervisor to help; gave up ownership of situation, or failed to recognize the importance of offering the customer high quality service.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.4, 2.6, 3.1, 5.1 CC 1.1, 1.3, 2.2, 2.3, 2.5, 3.1 3.3, 3.5

QUESTION: Working in retail requires employees to occasionally deal with customers who are upset, and sometimes verbally abusive. Assume a man approaches you and appears very angry. He starts yelling at you about some problem he is having with the new lawnmower that you had recommended he purchase from your store. He loudly says, in front of several other shoppers, that you obviously don't value your customers or care about the quality of the products that you sell. You are only filling in for a co-worker in the outdoor equipment department and did not help this customer with their initial purchase, nor do you know much about lawnmowers. How should you deal with this customer?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognized the need to show concern for the customer's problem while calming him down and allowing him to vent his frustrations in order to defuse the situation.
2. Emphasized the need to apologize for any difficulty the situation has caused even though he/she is not directly responsible for the problem.
3. Recognized the need to look into the problem further in order to determine the cause, so that the proper type of assistance could be provided.
4. Recognized the need to obtain the assistance of a co-worker who was knowledgeable about lawnmowers or the need to alert the manager to the problem.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Suggested responding in such a way that he/she failed to take ownership for the problem/situation (e.g., pointed the customer in the direction of another co-worker who works in the department), or overemphasized lack of personal responsibility for causing the problem, (e.g., stating "I'm just filling in.").
2. Failed to recognize the need to demonstrate concern for the customer's problem (e.g., suggesting that he calm down since it's just a minor problem that can easily be corrected).
3. Suggested responding in such a way that he/she attempted to explain the cause of the problem without asking for any details (e.g., stating, "It probably just needs a new...") or recommended a solution (e.g., "We'll get you a brand new lawnmower immediately.") without knowing all of the facts.
4. Failed to recognize the need to obtain assistance from someone more knowledgeable of the equipment, or the need for the manager to be alerted.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.4, 2.6, 3.1, 5.1 CC 1.1, 1.3, 2.2, 2.3, 2.5, 3.1 3.3, 3.5

QUESTION: Assume the following situation occurs. You are on your way to unload a shipment in the stockroom. You have just enough time to finish unloading the merchandise before you are scheduled to take your break. You happen to pass a new associate who is busy setting up a sweater display for the new fall clothing line. You ask him how he is doing. He proudly points to the display and tells you that the manager told him to set up the entire display before noon. He adds that he is just about finished and that he has been so busy that he hasn't even taken his break. As you listen, you notice that the sweaters are folded incorrectly and do not seem to be arranged by size, but only by color. You know that this is not the correct way to set up the display. How should you handle the situation? Why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognized the need to tell the new associate, in specific and clear terms, how to properly perform the task (i.e., explain to him how to arrange by size and how to correctly fold sweaters).
2. Demonstrated a willingness to personally assist the associate in redoing the display.
3. Perceived that the mistakes in the display could negatively affect the quality of service provided by the store and could also affect sales (e.g., sizes would be harder to find, sweaters may look messy or unattractive, etc.).
4. Recognized the need to prioritize work activities and put the needs of the new employee ahead of own (e.g., scheduled break).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Suggested telling the associate the task was being done incorrectly, showing him how to do it correctly, but failed to recognize the need to offer assistance.
2. Responded in such a way that he/she failed to demonstrate flexibility by modifying planned activities (e.g., unload the shipment after helping co-worker even if it meant losing break).
3. Recommended apologizing to the clerk for not being able to offer assistance because of own schedule.
4. Suggested telling the new associate to go on break and redoing the display himself/herself.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.4, 2.6, 3.1, 5.1
CC 1.1, 1.3, 2.2, 2.3, 2.5, 3.1 3.3, 3.5

QUESTION: From time to time, you may receive requests from customers that are not in line with company policies or work guidelines. In some cases we are able to make exceptions to our store policies, but at other times, we're just not able to do what the customer requests. If a customer asked you to do something that clearly could not be done, how would you handle the situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Suggested exploring alternative actions that might address or partially address the customer's needs.
2. Suggested apologizing for not being able to comply with the customer's request.
3. Suggested explaining why the request cannot be met (i.e., why the policy exists and/or benefits the customer).
4. Emphasized the need to take actions that would leave the customer with a positive impression of the company (i.e., reiterate concern, apologizing for any inconvenience or problems caused by the inability to meet the request).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failed to recognize the importance of taking ownership of the situation versus blindly referring the problem to the store manager.
2. Indicated that the customer would simply be told that "policy" does not allow the action to be taken without further explanation.
3. Failed to indicate concern for the customer's feelings/perspective.
4. Failed to consider alternative actions that might address or partially address the customer's needs.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.4, 2.6, 3.1, 5.1
CC 1.1, 1.3, 2.2, 2.3, 2.5, 3.1 3.3, 3.5

QUESTION: Assume a customer approaches you with an unusual request, which will require making an exception to store policy. The request sounds reasonable and making the exception may be possible, but it is not within your authority to do so. Making the exception will require the approval of your store manager, who is currently out to lunch and cannot be reached for another hour. What would you say to the customer and what actions would you take?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. From the customer's perspective, attempting to retain ownership of the situation (e.g., does not indicate that the decision is beyond own limits of authority, should state something like, "I'll need to look into it before I can give you an answer.").
2. Suggested responding in such a way as to not give the customer any indication that the request will be met.
3. Recommended gathering as much information as possible in order to facilitate resolving the matter as quickly as possible with the manager.
4. Suggested informing the customer when he/she could expect an answer."
5. Emphasized the importance of initiating follow-up procedures (e.g., offering to call the customer with an answer) if a resolution could not be resolved before the customer left the store.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Suggested indicating that the request will probably be met (e.g., stating, "That sounds reasonable.", or "We should be able to do that."), even though the associate had no authority to do so.
2. Suggested delegating the responsibility for the situation to the store manager without attempting to gather any information and assist in resolving the matter.
3. Failed to retain ownership of the situation from the customer's point of view (i.e., saying "I'll have to check with my manager before I can give you an answer on that.").
4. Failed to express personal commitment to follow-up with the customer (e.g., asking the customer to call back, or committing the manager or someone else to follow-up with the customer).

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2
CC 1.3, 1.4, 2.1, 2.2, 2.3, 2.5, 3.3, 3.5

QUESTION: Assume that you work in the women's clothing department. A customer enters your department and asks you for help in exchanging or getting a refund for a piece of luggage he/she purchased last week. The customer has already waited in the luggage department for fifteen minutes, but could not find anyone to help with the request. The store's policy is very clear: the department that initially made the sale must process all exchanges (or refunds). What would you say to this customer and how would you handle this situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Suggested apologizing for the inconvenience that the situation has caused the customer.
2. Responded in such a way that does not blame another department for the situation, but rather demonstrates a personal commitment to resolving the situation.
3. Emphasized the importance of attempting to contact a representative from the luggage department, explain the situation, and inform the representative that the customer will arrive soon to make the exchange.
4. Suggested personally escorting the customer to the luggage department and helping them locate a representative to handle the request. Emphasized the importance of providing a brief background of the situation and introduce the customer to the representative.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Suggested telling the customer that all refunds need to be made in the department where they bought the merchandise and instructing the customer to wait in the luggage department until a representative arrives.
2. Suggested simply telling the customer "We don't deal with luggage in this department".
3. Failed to recognize the importance of displaying personal commitment to resolving the situation.
4. Failed to suggest apologizing for any inconvenience the situation caused the customer, (i.e., failed to demonstrate taking ownership for the situation)

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2
CC 1.2, 1.3. 1.4, 2.1, 2.2, 2.3, 2.5, 3.3, 3.5

Additional Simulations follow that address the Skills (and competencies/ tasks) measured by AccuVision Workforce Readiness Skill program (WRS)

Note: The following scenarios take place in a **CUSTOMER SERVICE ENVIRONMENT** and are taken from our Office Success Skills program. Even so, they directly relate to Skills address by WRS.

QUESTION: From time to time, we may receive requests from customers that are not in line with our standard policies or procedures. In some cases, we're able to make exceptions to our policies and procedures, but in other cases, we're just not able to do what the customer requests. If a customer asked you to do something that clearly could not be done, what would you say and do?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for not being able to comply with the customer's request.
2. Exploring alternative actions that might address or partially address the customer's needs.
3. Explaining why the request cannot be met (i.e., why the policy exists and/or how it benefits the customer).
4. Taking actions that would leave the customer with a positive impression of the company (i.e., reiterating concern, apologizing for any inconvenience or problems caused by the inability to meet the request, etc.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Referring the problem to the supervisor versus taking ownership of the situation.
2. Indicating that the customer would simply be told that "policy" does not allow the action to be taken.
3. Failing to indicate concern for the customer's feelings/perspective.
4. Failing to consider alternative actions that might address or partially address the customer's needs.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.6, 4.1, 5.1
CC 1.2, 2.1, 3.3, 3.5

QUESTION: Assume the following: A new customer calls to arrange for service. After gathering some preliminary information, you explain to him that your company requires a deposit from all new customers. You know that the company will not allow exceptions to this policy. The customer becomes upset, and tells you he has an excellent credit record, he's never been late with a payment, and he has no intention of paying a deposit for service. He begins using harsh language, criticizing the company for the policy, and insulting you personally. How would you handle the situation and what would you tell the customer?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Demonstrating an understanding of the customer's reason for being upset and not wanting to pay the deposit.
2. Attempting to handle the call, rather than hanging up or transferring the call to someone else.
3. Attempting to explain the reasons behind the policy.
4. Initially allowing the customer to vent his anger.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Becoming irate and/or allowing the customer's behavior to interfere with his/her own rational behavior, language, or thinking (e.g., hanging up, using inappropriate language, avoiding the call, referring the call to another CSR or supervisor, telling the customer "I don't have to take this," etc.).
2. Responding in a way that might indicate the deposit will be waived.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 4
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.6, 3.1, 3.2, 4.2
CC 1.1, 1.2, 1.3, 1.5, 2.2, 2.4, 3.3, 3.5

QUESTION: Assume the following: You're talking to a customer about a notice of late payment she just received, which informed her that her payment was two weeks late and she was being charged a late fee. She tells you she mailed the payment the same time as always, and your company should have gotten the payment on time. You check her records and find that you haven't received her payment yet. You also notice that this customer has never made a late payment in three years. The customer wants this situation cleared up. How would you handle this situation and why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing and showing empathy/concern for the customer's problem.
2. Recognizing that the customer's record of timely payments lends credence to her story.
3. Suggesting the customer call her bank to find out if the check had cleared, then call you back with the information.
4. Offering to waive any late fees generated as a result of the misdirected payment.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to apologize or show empathy for the customer's problem.
2. Ignoring or failing to recognize the relevance of her history as a good customer (e.g., timely payments and long-time customer).
3. Not responding to the customer's request for closure (e.g., suggesting the customer simply ignore the notice).
4. Assuming a "tough" position with the customer (e.g., "Since we haven't received your payment, you must pay the late fee") or assuming a helpless attitude (e.g., telling the customer nothing can be done).
5. Failing to waive any late fees.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2
CC 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 2.5, 3.3, 3.5

QUESTION: As a customer service representative, you may be called on to handle a variety of customer situations. One particularly challenging situation involves customers who make unreasonable or unjustified demands. If you were confronted with this type of situation, how would you handle it?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Demonstrating an understanding of the customer's problem/situation and showing empathy for the customer's feelings of anger, frustration, etc.
2. Apologizing for any inconvenience.
3. Politely refusing to grant the customer's request or demand.
4. Explaining why the demand cannot be met (e.g., why the policy exists and/or how it benefits the customer).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to show empathy for the customer's situation/problem.
2. Demonstrating a reluctance to personally handle the situation (e.g., referring the problem to the supervisor).
3. Simply telling the customer that "policy" prohibits meeting the customer's demand and avoiding further explanation.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.6, 3.1, 4.2, 5.1, 5.2
CC 1.2, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1, 3.3, 3.5

QUESTION: Assume you've been asked to contact a customer who called earlier regarding a problem. When you contact the customer, she explains that she's one day late in making her payment, but doesn't want her payment recorded as a "late payment." She explains that she's applying for a loan, and doesn't want anything to damage her credit rating. She further states that this is the first time she's been late with a payment in the last five years, and asks you to waive the \$10 late fee. The computer system is down, so you can't check her payment history. Assuming you had the authority to do as the customer requested, what would you do and why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognizing that whether or not the payment is recorded as "late" is of little consequence to the company, compared with the importance of the customer maintaining a positive perception of the company, or the effort and expense of postponing the decision until the customer's payment history can be verified.
2. Demonstrating empathy for the customer's situation and an understanding of the customer's concern for a good credit rating.
3. Displaying a willingness to make the decision without the need to consult others.
4. Waiving the late fee.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Determining that recording the payment as "late" is worth the customer's poor perception of the company or the time and expense involved in making a decision at a later time.
2. Failing to demonstrate empathy for and understanding of the customer's situation and concerns.
3. Displaying a reluctance to make a decision based on own judgment, and/or deferring the decision to someone else (e.g., supervisor or another CSR).
4. Failing to waive the late fee, for any reason.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2
CC 1.1, 1.2, 1.3, 1.4 1.5, 2.1, 2.4, 3.1, 3.3, 3.5

QUESTION: Assume the following: You're contacted by a customer who just signed up for a monthly service with your company. She just received her first statement and now she's questioning a \$12 charge labeled "service fee." When you explain that this is a regular monthly charge for that service, she tells you no one explained the fee to her when she signed up for the service. How would you handle this situation and why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Offering to waive the service fee on a one-time basis.
2. Explaining that in the future the customer will be charged a \$12 monthly service fee.
3. Recognizing that the customer will potentially have an on-going relationship with the company and that waiving the fee will create goodwill with the customer.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to waive this month's service fee.
2. Neglecting to remind the customer that beginning next month, she will be charged a \$12 service fee each month.
3. Failing to recognize that creating and maintaining a positive relationship with the customer is important for sustaining customer loyalty.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.3, 2.6, 4.2, 5.1
CC 1.1, 1.2, 1.3, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1, 3.3, 3.5

QUESTION: Assume you're a customer service representative whose company sells a particular product. Your company has a policy stating that if for any reason a customer is not fully satisfied with the product, he or she may return it within 30 days of purchase and receive a full refund.

Assume a customer contacts you and states that he's disappointed with the product and wants a refund. You check the records and see that he purchased it over 3 months ago. You know that the only time the company will make exceptions to the refund policy is if the product is defective. In those cases, only the supervisor can approve the refund. What would you do and what would say to this customer?

(INTERVIEWER NOTE: If the participant says that he/she would ask the customer why he was unhappy with the product, ask the following question.) Suppose the customer says he wants the refund because he just hasn't had as much use for the product as he thought he would. What would you do in this situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for the problem and for any inconvenience the customer may have experienced as a result of the problem.
2. Questioning the customer to find out why he is unhappy with the product.
3. Recognizing that the customer is asking for something that is clearly against policy and handling the situation without involving the supervisor.
4. Attempting to find a compromise solution that might address or partially address the customer's needs (e.g., offering a portion of the purchase price as a refund, offering credit toward the next purchase, etc.).
5. Attempting to end the conversation on a positive note (e.g., apologizing for any inconvenience or problems caused by the inability to meet the request, showing empathy/concern).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to apologize for the problem and for the customer's inconvenience.
2. Failing to determine why the customer is unhappy with the product.
3. Demonstrating a reluctance to make the decision (e.g., proposing to contact the supervisor before making a decision, simply referring the problem to the supervisor).
4. Failing to take ownership for the situation (e.g., making comments such as, "If it were up to me I would, however...", or "I wish I could, but...").
5. Simply telling the customer nothing can be done because "it's against policy," and/or failing to consider alternative solutions that might address or partially address the customer's needs.

Cont'd on next page....

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2
CC 1.2, 1.3. 1.4, 2.1, 2.2, 2.3, 2.5, 3.3, 3.5

QUESTION: Assume the following: It's a slow day at work and your supervisor asked you to spend the last hour of the day handling some delinquent accounts. You answer a call from a customer and he's obviously irritated. He tells you that he called your company two weeks ago requesting copies of his invoices from the last six months. He tells you the person he spoke with assured him he would receive the copies within a week; however, he still hasn't received them. He needs the invoices for a meeting he has first thing in the morning and says he's willing to pick them up. What would you do in this situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Acknowledging that the customer was inconvenienced by the delay and apologizing for the inconvenience.
2. Displaying a willingness to change work schedule in order to accommodate the customer request.
3. Displaying a willingness to make the decision without the need to consult others.
4. Offering to take the information and have the invoices ready for the customer that day.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to acknowledge and/or apologize for the customer's inconvenience.
2. Explaining that he/she was busy and wouldn't be able to get to the customer's request that day.
3. Asking the supervisor for permission to handle the problem and/or deferring the problem to the supervisor for resolution.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2, 4, 5
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.4, 2.6, 4.2, 5.1
CC 1.2, 1.3, 1.4, 1.5, 2.1, 2.2, 2.4, 2.5, 3.3, 3.5

QUESTION: Suppose you answer a call from a customer and he immediately tells you he wants to speak to your supervisor. What would you do?

(INTERVIEWER NOTE: If the participant says that he/she would try to help the customer without transferring the call to the supervisor, ask the following question.) What if the customer then says he already explained the problem to someone else in your department and they didn't solve his problem, so he wants you to "put him through to your supervisor right now"? What would you say to this customer and what would you do?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Offering to help the customer without involving the supervisor.
2. Apologizing for the problem.
3. Expressing empathy/concern for the customer's situation.
4. Attempting to gather as much information as possible in order to understand the customer's problem/situation and facilitate problem solving.
5. Attempting to find ways to help the customer without involving the supervisor.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Transferring the call to the supervisor without first attempting to help the customer.
2. Failing to apologize for the problem.
3. Failing to show concern, empathy, and/or understanding for the customer's perspective of the situation.
4. Failing to gather information in order to facilitate the process of helping the customer.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.3, 2.4, 2.5, 2.6, 3.2, 4.2, 5.1
CC 1.2, 1.3, 1.4, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1, 3.3, 3.5

QUESTION: Assume a customer calls and begins complaining angrily because your company missed a scheduled service call at his house. He continues to complain that he talked to a "Dave" at your office, and "Dave" assured him someone would be at his house before 10 a.m. today. It is now 1:30 p.m. and no service person has arrived yet. You check the records and find no record of a service call being scheduled at his address. You also know that one of the other customer service representatives is named "Dave." What would you do and what would you say to this customer?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Responding in such a way that does not place blame for the error/problem on any other individual, but rather demonstrates a personal commitment to resolving the problem.
2. Apologizing for the problem and the customer's inconvenience.
3. Demonstrating understanding and/or agreement with the customer that he has a right to be upset about the situation and the inconvenience it has caused him.
4. Attempting to reschedule the call at the customer's convenience.
5. Recognizing that there is no need to question or involve "Dave" before resolving the problem.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to display personal commitment to resolving the problem.
2. Failing to apologize for the problem.
3. Demonstrating a lack of concern for the inconvenience to the customer.
4. Asking the customer to wait while he/she talks to "Dave" about the service call or transferring the customer to "Dave" or the supervisor for resolution of the problem.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.4, 2.6, 4.2, 5.1
CC 1.1 1.2, 1.3. 1.4, 1.5, 2.1, 2.4, 3.1, 3.3, 3.5

QUESTION: Assume a customer calls you, wanting information on a particular product or service. Once you've provided the information, the customer appears interested in the product or service. At this point, what would you do?

(INTERVIEWER NOTE: If the participant says that he/she would ask the customer to buy the product or service, ask the following question.) Suppose you asked the customer to buy the product or service, but when you told her the price, she seemed surprised and told you the price was more than she wanted to pay. She goes on to tell you she wants to "think it over." What would you do and what would you say to the customer?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Asking the customer if she has any additional questions about the product or service.
2. Asking the customer for the sale.
3. When the customer balks at the price, restating the positive aspects of the product or service and how it will benefit the customer.
4. Demonstrating persistence by encouraging the customer to try the product or service now, instead of taking time to "think it over."

SAMPLE INEFFECTIVE BEHAVIORS:

1. Neglecting to ask the customer for additional questions.
2. Failing to reiterate the positive features and/or benefits of the product or service.
3. Demonstrating a reluctance to ask for the sale (e.g., simply remaining passive or agreeing when the customer says she wants to "think it over" before purchasing).

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.3, 2.4, 4.1, 5.1
CC 1.3, 1.4, 2.1, 2.3, 3.1, 3.3, 3.5

QUESTION: Assume the following: A customer calls and tells you that because of some unusual circumstances, he's going to need some extra time to make his payment. Assuming you have the power to make the decision, what other kinds of information would you want to have before making a decision about his request?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Checking the status of the customer's account (e.g., is his payment already overdue, does he have a history of late payments, etc.).
2. Asking the customer when he anticipates being able to make the payment.
3. Exploring possible alternatives (e.g., asking the customer if he can make a partial or token payment) to use until the customer is able to send the full payment.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to recognize the importance of checking the customer's account history.
2. Neglecting to ask the customer when he anticipates making the full payment.
3. Failing to suggest possible alternatives for dealing with the situation.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.3, 2.6, 4.2, 5.1
CC 1.3, 1.4, 1.5, 2.1, 2.2, 2.3, 3.1, 3.5

QUESTION: Assume a customer calls with an unusual request that would require making an exception to policy. The request sounds reasonable and making the exception may be possible, but it is not within your authority to do so. Making the exception will require the approval of the supervisor, who is currently out to lunch, and cannot be reached for another hour. What would you say to this customer and what actions would you take?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Responding in such a way so as to not give the customer any indication that the request will be met.
2. Attempting to retain ownership for the call (e.g., does not indicate that the decision is beyond own limits of authority, should state something like, "I'll need to look into it before I can give you an answer").
3. Gathering as much information as possible and acting as an intermediary, in order to facilitate resolving the matter as quickly as possible.
4. Advising the customer when he/she can expect an answer.
5. Initiating follow-up procedures (e.g., offering to call the customer with an answer, etc.).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Indicating that the request will probably be met (e.g., stating "That sounds reasonable," or "We should be able to do that," etc.).
2. Delegating the responsibility for the call to the supervisor without attempting to gather any information and assist in resolving the matter.
3. Failing to retain ownership of the call (i.e., saying "I'll have to check with my supervisor before I can give you an answer on that," etc.).
4. Failing to express personal commitment to follow-up with the customer (e.g., asking the customer to call back, or committing the supervisor or someone else to follow-up with the customer).

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2, 4.2, 5.1
CC 1.3, 1.4, 2.2, 2.4, 3.3, 3.5

QUESTION: We provide many different services to our customers. When customers call with a question, or to open an account, you may be in a position to sell these services. What kinds of activities do you think are important when trying to sell services to customers?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Explaining the service to the customer (e.g., what it is and how it works).
2. Explaining how the service would benefit the customer (e.g., the advantages of having the service).
3. Asking if the customer has any questions about the service.
4. Asking the customer for the sale (e.g., "Does this sound like something you'd be interested in?"), or suggesting the customer buy the service (e.g., "It's really a great service, and I think you should consider purchasing it.").

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to explain the service to the customer.
2. Failing to explain the benefits/advantages of having the service.
3. Neglecting to ask if the customer has questions about the service.
4. Failing to recognize the need for closure (e.g., not asking the customer for the sale or suggesting the customer buy the service).
5. Displaying an overly aggressive or "pushy" manner with the customer.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2, 4, 5
 CC 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.3, 2.5, 4.1, 5.1
CC 2.1, 2.3, 3.1, 3.3, 3.5

QUESTION: Assume the following has happened: You receive a call from a customer who tells you she hasn't been able to access the service she has through your company. She's very angry because the service outage has created a great deal of inconvenience and extra work for her. As the customer service person, you know the problem was caused by a power surge that damaged some equipment. You also know that repair personnel are currently working on the equipment and that the service should be operating within a couple of hours. What would you tell the customer?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for the service interruption.
2. Demonstrating empathy and regard for the customer's situation, and an understanding that the customer was justifiably upset.
3. Explaining the cause of the service interruption.
4. Assuring the customer the problem is being corrected and service will be restored within a couple of hours.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Demonstrating a lack of concern or understanding of the customer's situation (e.g., how the service interruption affected the customer).
2. Failing to apologize for the service interruption.
3. Failing to adequately explain to the customer the reason for the service interruption, or when the service will be restored.
4. Stating to the customer that the service interruption is beyond the company's control, or that there is nothing the company could have done to prevent it.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.4, 4.2, 5.1 CC 1.1, 1.2, 1.3. 1.4, 1.5, 2.2, 3.3, 3.5

Additional Simulations follow that address the Skills (and competencies/ tasks) measured by AccuVision Workforce Readiness Skill program (WRS)

Note: The following scenarios take place in a **BANKING/FINANCIAL SERVICES ENVIRONMENT** and are taken from our Office Success Skills program. Even so, they directly relate to Skills address by WRS.

QUESTION: From time to time, we may receive requests from customers that are not in line with our standard policies or procedures. In some cases we're able to make exceptions to our policies and procedures, but in other cases we're just not able to do what the customer requests. If a customer asked you to do something that clearly could not be done, what would you say and do?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for not being able to comply with the customer's request.
2. Exploring alternative actions that might address or partially address the customer's needs.
3. Explaining why the request cannot be met (i.e., why the policy exists and/or how it benefits the customer).
4. Taking actions that would leave the customer with a positive impression of the company (i.e., reiterating concern, apologizing for any inconvenience or problems caused by the inability to meet the request, etc.).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Referring the problem to the supervisor versus taking ownership of the situation.
2. Indicating that the customer would simply be told that "policy" does not allow the action to be taken.
3. Failing to indicate concern for the customer's feelings/perspective.
4. Failing to consider alternative actions that might address or partially address the customer's needs.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.2, 4.2, 5.1
CC 1.5, 2.1, 2.2, 2.4, 3.3, 3.5

QUESTION: Assume the following has happened: You answer a call from a customer who says you handled her deposit yesterday. She says she deposited \$120, but the receipt she has only shows a deposit of \$100. You know that yesterday when you looked at your transactions and the money left in your cash drawer, they balanced perfectly, and it is therefore highly unlikely that you made an error. What would you do and what would you say to this customer?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing and showing empathy/concern for the customer's problem.
2. Explaining that both the cash drawer and paperwork for yesterday were correct.
3. Offering to re-check yesterday's work and call the customer after completing the process.
4. Asking the customer to re-check her records to see if they are correct.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to show empathy/concern for the customer's problem.
2. Dismissing the problem without offering to re-check yesterday's work and records to see if an error had occurred.
3. Asking the customer to call back versus offering to call the customer after rechecking the work.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 3, 4, 5
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.4, 2.6, 3.1, 4.2, 5.1
CC 1.1, 1.3, 1.4, 2.1, 2.2, 3.1,, 3.3, 3.5

QUESTION: Assume you have a customer who had a check returned because he didn't have enough funds to cover it. When you check the records, you find that this is his third returned check in 2 months. He tells you the problem occurred because he made a subtraction error in his checkbook; he apologizes and asks you to reverse the \$10 returned check charge. The records indicate that he wasn't charged for his last two returned checks. What would you do in this situation and why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Politely denying customer's request to reverse NSF charge.
2. Recognizing that the two previous NSF charges should have no effect on the current charge.
3. Explaining that the customer will be charged for future NSFs.
4. Recognizing that the customer has had an excessive number of NSFs within the last 2 months and that he may be habitually overdrawing his account.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Agreeing to reverse the NSF charge for the customer.
2. Failing to recognize that the prior fees should have no effect on the current situation.
3. Failing to recognize that the customer has had an excessive number of NSFs in a short period of time.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2, 5
 CC 1, 2

Tasks/Competencies relevant to the above skills include:

PQ 2.6, 5.1
CC 1.1, 1.3, 1.5, 2.1, 2.2

QUESTION: Assume you have a customer who wants to deposit a check for \$1,000. On his deposit slip, he's indicated that he wants \$25 back in cash. Your financial institution requires that customers show identification when getting cash back on a deposit. When you ask for his identification, he tells you that he left his wallet at home and doesn't have any identification with him. When you check the records, you see that he's been a customer for almost 5 years. What would you do in this situation and why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Agreeing to give the customer cash back on his deposit.
2. Explaining how the identification policy benefits the customer.
3. Recognizing that the person has been a long-time customer.
4. Recognizing that the amount of cash the customer is requesting represents a small portion of the overall deposit and is therefore not a likely attempt at fraud.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Refusing to give the customer cash back on his deposit.
2. Failing to explain how the identification policy benefits the customer.
3. Failing to recognize that the customer has established a long-term relationship with the financial institution.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 4, 5
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 4.2, 5.1
CC 1.1, 1.2, 1.3, 1.4, 2.4, 3.1, 3.3, 3.5

QUESTION: Assume you have an individual who wants to purchase a \$50 money order. You prepare the money order and inform him there's a \$2 fee for money orders. He tells you he's on an errand for his boss, who's a customer of your financial institution and his boss only gave him a check for \$50 to buy the money order. He says he didn't know about the fee, and doesn't have the extra \$2. What would you do in this situation and why?

NOTES: _____

QUESTION - SAMPLE EFFECTIVE BEHAVIORS:

1. Agreeing to give him the money order at no charge.
2. Explaining that in the future the customer will be charged a \$2 fee for all money orders.
3. Recognizing that waiving the fee this time will save the customer time and won't cause an inconvenience.

QUESTION - SAMPLE INEFFECTIVE BEHAVIORS:

1. Refusing to waive the money order fee on a one-time basis.
2. Failing to remind the customer that in the future he will be charged a \$2 fee for all money orders.
3. Failing to recognize that requiring the customer to return to his office for the \$2 fee would cost the customer time and would be an inconvenience.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.4, 4.2
CC 1.3, 1.4, 1.5, 2.1, 2.2, 3.1, 3.3, 3.5

QUESTION: Assume you have a customer who wants to deposit a check for a large amount of money. The check is written on his account at an out-of-state financial institution. You inform the customer that he will not be able to use the funds for 5 days, in order to allow enough time for the check to process through his account at the other institution. He tells you he can't wait 5 days and needs to be able to use the money right away. When you check his account, you see that he's been a customer for 3 months. What would you do in this situation and why?

NOTES: _____

QUESTION - SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for any inconvenience and empathizing with the customer's situation.
2. Politely refusing to give the customer immediate credit on the deposit.
3. Recognizing that the customer has only had his account for a short period of time and has not established a long-term relationship with the financial institution.
4. Explaining that the "hold" policy is in place to help prevent the financial institution from taking a monetary loss.

QUESTION - SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to show empathy for the customer's situation.
2. Agreeing to accept the deposit for immediate credit.
3. Failing to note that the customer has not established a long-term relationship with the financial institution, and might represent a risk.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2, 4
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.3, 4.2
CC 1.1, 1.3, 1.5, 2.2, 2.3, 2.4, 3.3, 3.5

QUESTION: Assume a customer calls with an unusual request that would require making an exception to policy. The request sounds reasonable and making the exception may be possible, but it is not within your authority to do so. Making the exception will require the approval of the supervisor, who is currently out to lunch and cannot be reached for another hour. What would you say to this customer?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Responding in such a way as to not give the customer any indication that the request will be met.
2. Attempting to retain ownership for the call (i.e., does not indicate that the decision is beyond own limits of authority, should state something like, "I'll need to look into it before I can give you an answer").
3. Gathering as much information as possible and acting as an intermediary, in order to facilitate resolving the matter as quickly as possible.
4. Informing the customer when he/she can expect an answer.
5. Initiating follow- up procedures (i.e., offering to call the customer with an answer, etc.).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Indicating that the request will probably be met (i.e., stating "that sounds reasonable," Or "I don't see why we wouldn't be able to do that," etc.).
2. Delegating the responsibility for the call to the supervisor without attempting to gather any information and assist in resolving the matter.
3. Failing to retain ownership of the call (i.e., saying, "I'll have to check with my supervisor before I can give you an answer on that," etc.).
4. Asking the customer to call back versus offering to call the customer with an answer.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.3, 2.6, 4.2, 5.1
CC 1.3, 1.4, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1 3.3, 3.5

QUESTION: Assume that you're in the process of opening some accounts for a customer. You've been with this customer for 20 minutes and you'll need another 15 minutes to finish. While you're opening these accounts, you answer a call from a customer you know well and have helped on several occasions. He tells you he has an emergency situation. He's on vacation and just had two credit cards stolen. Because you're familiar with his accounts, he wants you to immediately cancel both credit cards and reissue replacements. You know this will take you about 10 minutes to do. How would you handle this situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Explaining to the caller that you are with a customer, but will get someone else to help him immediately.
2. Explaining the situation to the current customer, apologizing for the inconvenience, and excusing self in order to find someone to help the caller.
3. Planning to follow up with the caller to ensure the problem has been resolved to his satisfaction.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to recognize the urgency of the caller's situation, and to find someone to help the caller.
2. Asking the customer if he/she would mind waiting until after the caller is helped.
3. Asking the caller to call back later in order to take the information and resolve the problem.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 5
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2, 2.4, 2.6, 5.1
CC 1.3, 1.4, 1.5, 2.1 3.1, 3.3, 3.5

QUESTION: Assume that it's a very busy day at your financial institution, and the customer lines are long. A customer approaches your window and asks why he has a 50 cent charge on his account statement. You notice that his account was charged because he used an automatic teller machine at a different institution. You explain this to the customer and he begins complaining about the charge, saying that no one had ever informed him that he would be charged. He then asks to speak to the supervisor about the matter. What would you do in this situation and why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing to the customer for the misunderstanding.
2. Explaining that the customer will be charged a service charge for using ATMs at other financial institutions.
3. Offering to reverse the charge and credit the customer's account for the 50 cent charge.
4. Recognizing that the 50 cent charge is a trivial matter, and should be taken care of quickly so as not to delay the other customers unnecessarily.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to apologize for the misunderstanding.
2. Failing to explain that the use of ATMs at other financial institutions will result in a service charge.
3. Failing to reverse the charge in order to expedite a solution of the problem.
4. Referring the situation to the supervisor.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 5
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.3, 4.2
CC 1.2,1.3, 2.1,, 2.2, 2.4, 3.3, 3.5

QUESTION: Assume you're talking to a very angry customer. He wants to know why a deposit he made at the automatic teller machine on Friday afternoon wasn't credited to his account until Tuesday. As he explains, you realize that due to a holiday, your financial institution was closed on Monday, and in those instances, Friday afternoon's work isn't processed until Tuesday. He goes on to tell you that because his deposit was credited late, he had a check returned because he didn't have the funds to cover it. Not only did he have a \$15 insufficient funds charge from your financial institution, he was also being charged \$10 by the company who received the check. The records show that he's been with your institution for over two years, and only has a checking account and a small savings account. What would you do in this situation and why?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for the misunderstanding and showing empathy for the customer's situation.
2. Explaining that your financial institution was closed because of the holiday, causing the work to be processed a day later than usual.
3. Offering to reverse the insufficient funds charge for the customer.
4. Recognizing that there was a misunderstanding about when the deposit would be processed and that the customer did not intentionally make a late deposit.

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to apologize for or empathize with the customer's problem.
2. Failing to explain the reason the customer's deposit was credited a day later than expected.
3. Failing to offer to reverse the insufficient funds charge.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5
	CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2 2.4, 4.2, 5.1
CC 1.2, 1.3, 1.4, 1.5, 2.1, 2.4, 3.1, 3.3, 3.5

QUESTION: Assume the following situation occurs. Monday afternoon, a customer approaches you and it's obvious that he's very upset. During the weekend, the automatic teller machine kept his account card, and because of this, he was unable to get any cash or make the deposit he needed to cover a check that would clear through his account today. You check and find that the machine kept his card because he had punched in the wrong personal identification number several times. It's now 2:15 and all deposits for the day were to be processed by 2:00. How would you handle this situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Apologizing for the inconvenience and empathizing with the customer's situation.
2. Explaining to the customer why the ATM kept his account card and why this policy benefits the customer (i.e., security of the account, etc.).
3. Offering to process the customer's deposit immediately, so that it can be credited today.
4. Offering to take any other actions necessary to correct the situation (i.e., ordering the customer another card, offering to cash a check for the customer, etc.).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to apologize for and/or empathize with the customer's situation.
2. Failing to explain why the card was kept and the benefits to the customer of such an action.
3. Failing to offer to process the deposit immediately or make any effort to defuse the situation.

Relating this discussion simulation to WRS Skills and Competencies

Skill PQ 2, 5
 CC 1, 2, 3

Tasks/Competencies relevant to the above skills include:

PQ 2.2 2.4, 2.6, 5.1
CC 1.1, 1.2, 1.3, 1.4, 2.1, 3.1, 3.3, 3.5

QUESTION: Assume that you have a customer who is making a deposit to his personal savings account. He tells you his wife also has a personal savings account and that she wants him to find out her account balance. According to policy, information about an account should only be given to the person whose name is on the account. How would you handle this situation?

NOTES: _____

SAMPLE EFFECTIVE BEHAVIORS:

1. Recognizing the need to maintain the confidentiality of the wife's account and refusing the customer's request with tact and empathy.
2. Explaining to the customer about the policy of keeping account information confidential.
3. Explaining how the policy benefits and protects all customers.
4. Offering an alternative solution that would take care of the customer's request while maintaining the confidentiality of the account (i.e., volunteering to call the customer's wife later and give her the account information, offering to mail the account information to her, etc.).

SAMPLE INEFFECTIVE BEHAVIORS:

1. Failing to recognize the need to maintain the confidentiality of the wife's account.
2. Failing to explore an alternative that would satisfy the customer's request while maintaining the confidentiality of the account.
3. Failing to explain the reasons behind the policy of account confidentiality. Explain the accounts and the benefits/advantages to the customer.
3. Failing to ask the customer for questions.
4. Failing to attempt to close the sale or suggest the customer try the product or service.
5. Becoming overly "pushy" with the customer.

Relating this discussion simulation to WRS Skills and Competencies

Skill	PQ 2, 4, 5 CC 1, 2, 3
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Tasks/Competencies relevant to the above skills include:

PQ 2.4, 2.6, 4.2, 5.1
CC 1.1, 1.4, 2.1, 2.2, 2.4, 3.1, 3.3, 3.5

Crosswalk Between:

AccuVision Workforce Readiness Skills (WRS) Competencies (Both Personal Qualities (PQ) and Customer Care (CC) and Competencies Measured by CASAS

WRS Module 1: Personal Qualities (PQ)

WRS Skill and Competency/Task		CASAS Competencies
PQ1	Skill: Integrity <i>You know right from wrong and try to do the right thing.</i>	
PQ1.1	Has the opportunity to break a rule and probably get away with it, but decides to follow the rule.	4.4; 4.8; 7.1; 7.2; 7.3; 7.5
PQ1.2	Tries to stop others who are about to break a rule. Reminds them of the rules and what could happen if they get caught. Will go to a manager or supervisor if necessary.	01; 4.4; 4.6; 4.8; 4.9; 7.1; 7.2; 7.3; 7.5
PQ2	Skill: Responsibility <i>You work hard to do your job the best that it can be done; you pay attention to details and concentrate even when doing things you don't like; you always try to be on time for work; you do your work with a positive attitude.</i>	
PQ2.1	Tries to keep private life from affecting work.	4.8; 7.1; 7.5
PQ2.2	Doesn't say "That's not my job." when something unusual or unexpected comes up that needs to be done.	4.4; 4.8; 7.1; 7.2; 7.3
PQ2.3	Willing to ask for help, more information or clearer instructions.	0.1; 4.4; 4.6; 4.8; 7.1; 7.2; 7.3
PQ2.4	Recognizes quality work, ready to go the extra mile to make sure that the job gets done right.	4.4; 4.6; 4.8; 4.9; 7.1
PQ2.5	Responds by helping out when needed, even if it means giving up some personal time.	4.7; 4.8; 7.1; 7.5
PQ2.6	Makes sure the job is done before leaving, does not leave extra work for next shift.	4.7; 7.1; 7.5
PQ 3	Skill: Self-Esteem <i>You handle feedback and suggestions without becoming defensive, angry or upset; you are not afraid to learn new things.</i>	
PQ3.1	Stands up for self where appropriate; on the other hand, doesn't take it personally when a manager points out incomplete or poorly done work; accepts suggestions for ways to do the job better.	0.1; 4.6; 4.8; 7.2; 7.5

WRS Skill and Competency/Task		CASAS Competencies
PQ3.2	Willing to try new things, learn new skills and ask for help when needed.	4.6; 4.8; 7.2; 7.5
PQ4	Skill: Self-Management <i>You are aware of what you can and can't do, and you're not afraid to ask for help when you need it; you try to get better at things that you don't do well.</i>	
PQ4.1	When things get slow, finds something to do rather than wait to be told what to do.	4.4; 4.6; 4.7; 4.8; 7.1
PQ4.2	Asks for help when he/she can't do something, whether it's because of a lack of training or information, or things are just too busy to get everything done.	4.4; 4.6; 4.7; 4.8; 7.1; 7.2; 7.3; 7.5
PQ5	Skill: Sociability <i>You are understanding, friendly, flexible, and polite; when you are around coworkers, you participate in whatever is going on, instead of trying to be "invisible"; you get along with others; you take an interest in what others say and do.</i>	
PQ5.1	Is open and honest with coworkers because he/she knows it's easier to work with people when everyone gets along.	0.1; 4.6; 4.8; 7.5
PQ5.2	Spends some time chatting with coworkers, but not too much. Knows the difference between "down time", when it's okay to socialize, and when it's time to concentrate on work and to let others concentrate on their work.	0.1; 0.2; 4.8; 4.9; 7.1; 7.2; 7.5

WRS Module 2: Customer Care Skills (CC)

WRS Skill and Competency/Task		CASAS Competencies
CC1	Skill: Customer Relations <i>Communicates in a positive manner, especially when handling complaints or conflict; efficiently obtains additional resources as needed to satisfy customer needs.</i>	
CC1.1	Remains polite and professional when interacting with customers who make unreasonable demands.	4.8; 7.5
CC1.2	Faced with a hostile customer, maintains positive demeanor and earnestly attempts to help the customer.	0.1; 1.6; 4.8; 7.5
CC1.3	Increases customer loyalty by immediately addressing concerns and following up.	1.2; 1.6; 4.8; 7.1; 7.2; 7.3
CC1.4	Handles competing customer needs in a calm and helpful manner, follows through on commitments.	1.6; 4.8; 7.1; 7.2; 7.5
CC2	Skill: Decision Making <i>Makes sound decisions when carrying out company policies and guidelines, develops solutions for customer problems, recognizes the limits of own authority and knows when a customer problem should be referred to others.</i>	

WRS Skill and Competency/Task		CASAS Competencies
CC2.1	Recognizes when it is best to personally handle customer needs versus when to direct the customer elsewhere	4.4; 4.6; 4.8; 4.9; 7.1; 7.2; 7.3
CC2.2	Recognizes priorities, then implements solutions based on an understanding of business need.	4.4; 4.6; 4.8; 4.9; 7.1; 7.2; 7.3
CC2.3	Decides when to vary from routine operating policies/guidelines and when to adhere to them.	1.2; 1.6; 4.4; 4.8; 4.9; 7.2; 7.3
CC2.4	Recognizes when more information is needed for making a decision.	4.4; 4.8; 7.1; 7.2; 7.3
CC2.5	Recognizes the limits of own authority, correctly decides when to use those limits in order to keep the customer satisfied.	4.4; 4.6; 4.8; 4.9; 7.1; 7.2; 7.3
CC3	Skill: Commitment to Quality <i>Works and communicates with clients and customers to satisfy their expectations; actively listens to customers to avoid misunderstandings.</i>	
CC3.1	Evaluates alternatives strategies for customer satisfaction, then chooses one that minimizes harm and makes the customer feel supported.	1.6; 4.4; 4.6; 4.8; 4.9; 7.1; 7.2; 7.3
CC3.2	Proactively assists peers for the purpose of increasing overall quality of company operations.	4.4; 4.6; 4.8; 7.2
CC3.3	Voice and body language communicate to the customer that satisfying the customer's need is of highest importance.	0.1; 4.6; 4.8; 7.5
CC3.4	Balances own work schedule against customer needs; willingly makes adjustments.	4.8; 4.9; 7.1; 7.2; 7.5
CC3.5	Determines customer need and improves customer relations by "listening" to customer comments and requests.	0.1; 1.6; 4.6; 4.8; 7.2; 7.3

For additional information about CASAS and its academic assessment tools, please go to: www.CASAS.com

For additional information about AlignMark and the soft skills assessment programs, please go to: www.alignmark.com

Profiles and Certificates

An example of an individual's profile follows. It objectively measures and documents the academic and soft skills competencies of the assessed person. If you would like to explore how your organization might make this type of profile and credential available to your students or community, please contact:

Jane Eguez at CASAS: jeguez@casas.com.

Workforce Skills Profile

Awarded to: Dow, John J.
By Agency: Rolling Hills Adult
Date Issued: January 12, 2010

ACADEMIC SKILLS

Basic  Advanced

1	2	3	4	5	6	7	8	Academic skills typically demonstrated at this level
					◆			Reading
								<ul style="list-style-type: none"> Interprets common written material related to everyday needs and to job. Understands the overall structure of most written materials in everyday and work contexts Interprets text in standard organizational formats, including tables and checklists Finds information in directories and simple reference materials Interprets illustrations and simple diagrams Has sufficient reading skills necessary for using a computer for common purposes such as reading routine e-mail and understanding Web page content
				◆				Math
								<ul style="list-style-type: none"> Uses mental math to solve simple problems Converts and calculates with units of time Calculates linear measurement in inches, feet and miles. Uses common measurement instruments Interprets data in tables and charts. Records data in simple formats

SOFT SKILLS

Basic  Advanced

1	2	3	4	5	6	7	8	Personal Quality skills demonstrated
				◆				Integrity
								<ul style="list-style-type: none"> Tries to stop others who are about to break a rule. Reminds them of the rules and what could happen if they get caught. Will go to a manager or supervisor if necessary.
							◆	Responsibility
								<ul style="list-style-type: none"> Tries to keep private life from affecting work. Doesn't say "That's not my job." when something unusual or unexpected comes up that needs to be done. Willing to ask for help, more information or clearer instructions. Recognizes quality work, ready to go the extra mile to make sure that the job gets done right. Responds by helping out when needed, even if it means giving up some personal time.
					◆			Self-Esteem
								<ul style="list-style-type: none"> Stands up for self where appropriate; on the other hand, doesn't take it personally when a manager points out incomplete or poorly done work; accepts suggestions for ways to do the job better. Willing to try new things, learn new skills and ask for help when needed.
					◆			Self-Management
								<ul style="list-style-type: none"> When things get slow, finds something to do rather than wait to be told what to do. Asks for help when he/she can't do something, whether it's because of a lack of training or information, or things are just too busy to get everything done.
							◆	Sociability
								<ul style="list-style-type: none"> Is open and honest with coworkers because he/she knows it's easier to work with people when everyone gets along.

Workforce Skills Profile

Awarded to: Dow, John J.
By Agency: Rolling Hills Adult
Date Issued: January 12, 2010

SOFT SKILLS

Basic  Advanced

1	2	3	4	5	6	7	8	Customer Care skills demonstrated
								Decision Making
								<ul style="list-style-type: none"> Recognizes when it is best to personally handle customer needs versus when to direct the customer elsewhere. Recognizes priorities, then implements solutions based on an understanding of business need. Decides when to vary from routine operating policies/guidelines and when to adhere to them. Recognizes when more information is needed for making a decision.
								Customer Relations
								<ul style="list-style-type: none"> Remains polite and professional when interacting with customers who make unreasonable demands. Faced with a hostile customer, maintains positive demeanor and earnestly attempts to help the customer.
								Commitment to Quality
								<ul style="list-style-type: none"> Evaluates alternative strategies for customer satisfaction, then chooses one that minimizes harm and makes the customer feel supported. Proactively assists peers for the purpose of increasing overall quality of company operations. Appropriately uses voice and body language communicate to the customer that satisfying the customer's need is of highest importance. Balances own work schedule against customer needs; willingly makes adjustments. Determines customer need and improves customer relations by "listening" to customer comments and requests.

ACADEMIC SKILLS

as measured by



The Academic skill scores are determined by an individual's responses to an internationally validated standardized assessment. Results are reported using National Reporting System (NRS) Educational Functioning Levels (EFL) accepted by both the U.S. Departments of Labor and Education to track academic skill achievement.

Detailed information about the full range of skills measured by CASAS can be found at www.casas.org

SOFT SKILLS

as measured by



The Soft Skill scores are determined by individual's responses to an objective, employer-validated assessment (using work-related video simulations) that has been used to assess millions of applicants and incumbent workers. A person with a score of 7 means that the individual scored better than 70% of those tested.

Detailed information about the full range of soft skills measured by AccuVision can be found at www.alignmark.com