

# Job Match Survey

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## *Call Center Simulation and Structured Employment Interview*

Dear Participant,

This survey is being used to determine the key work activities and skills required to effectively perform the Call Center Agent position in your organization. **The information you provide will be used for research purposes only and will remain confidential.** Information on this survey will be reported to Employment Technologies Corporation, a human resources firm. The survey will not be retained in any personnel file and should not be confused with any official personnel documents.

The survey will take approximately 5 to 10 minutes to complete. Once you have completed the survey, please return it to your administrator.

Thank you for your participation.

*Please check the one box below that best describes the Call Center Agent position:*

- Customer service
- Sales
- Customer service and sales
- Outbound sales
- Help desk
- Collections
- Data entry/processing
- Other (please specify) \_\_\_\_\_

*Your job title:*

- Call Center Agent
- Supervisor
- Other (please specify) \_\_\_\_\_



**Instructions:** Please read each statement below. Check the box that best describes how essential the activity is to overall job performance in the Call Center Agent position.

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| <u>Work Activity</u>  | <u>Essential</u>         | <u>Somewhat Essential</u> | <u>Not Essential</u>     |
|---|--------------------------|---------------------------|--------------------------|
| 1. Greets customers and introduces him/herself to establish rapport.  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 2. Obtains and enters relevant information (e.g., customer name, account number) into computerized database to access customer information. | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 3. Listens to customers' explanations to gain an understanding of their needs or issues.  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 4. Asks customers questions to determine the specific nature of their call.   | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 5. Uses the computerized database to access the information needed to assist customers.   | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 6. Determines a course of action based on the available information to resolve customer issues/objections.                                  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 7. Refers customers to the appropriate party if required.   | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 8. Informs customers of the action(s) taken to meet their needs.  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 9. Ensures customers are satisfied with the actions taken before closing the call.  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 10. Follows up as required after calls to execute agreed upon actions.  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 11. Documents the pertinent facts surrounding customer calls in the computerized database to maintain a current account history.            | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 12. Asks customers discovery questions to fully understand their needs and issues.  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 13. Listens to customers for cues that are linked to products and services.   | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 14. Suggests and explains the features and benefits of a product or service to customers so they can make an informed purchasing decision.  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 15. Responds to customer questions or objections to ensure customers have all the information available when making decisions.              | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |



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| <u>Work Activity</u>  | <u>Essential</u>         | <u>Somewhat Essential</u> | <u>Not Essential</u>     |
|---|--------------------------|---------------------------|--------------------------|
| 16. Identifies sales opportunities and takes appropriate action (processes sale or refers caller to appropriate personnel).                                       | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 17. Learns about product and service offerings, company policies, and operating procedures, including computerized database systems and call handling procedures. | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 18. Keeps abreast of changes to the product and service offering.   | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 19. Asks supervisor or coworkers questions to increase knowledge of products, services, policies, and procedures.   | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 20. Completes tutorials and/or practice calls to become more proficient in handling customer calls and using the database systems.                                | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 21. Seeks and/or reviews competitive information to understand how to position products and services against the competition.                                     | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 22. Suggests to supervisor ways to improve current operating procedures.  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 23. Participates in team or company meetings to contribute to call center effectiveness.  | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 24. Completes required forms or paperwork (e.g., timesheets, complaint logs) in accordance with call center procedures.   | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |
| 25. Participates in company functions (e.g., fundraisers, promotions) as requested to contribute to call center effectiveness.                                    | <input type="checkbox"/> | <input type="checkbox"/>  | <input type="checkbox"/> |



**Instructions:** Please read the definition for each skill listed below. Check the box that best describes how essential the skill is to overall job performance in the Call Center Agent position.

| <u>Skill</u>   | <u>Essential</u>         | <u>Somewhat<br/>Essential</u> | <u>Not<br/>Essential</u> |
|--|--------------------------|-------------------------------|--------------------------|
| <b>Sales Orientation:</b> Identifying customer needs for products and services, matching products and services to those needs, recommending and influencing customers toward appropriate products and services, and responding persuasively to customer questions and objections.  | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |
| <b>Multi-tasking:</b> Quickly and accurately performing multiple tasks (i.e., talking, listening, entering and documenting information, seeking information, problem solving) simultaneously while managing the pace of the call and maintaining focus on the customer.  | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |
| <b>Developing Customer Rapport:</b> Ensuring that customers have a positive image of the company by politely greeting customers, determining customers' desired interaction styles and responding accordingly, diffusing irate or insistent customers, maintaining an appropriate demeanor for all customer calls, checking customers' satisfaction, and following up to ensure that customers' needs are met and their expectations exceeded. | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |
| <b>Discovering Customer Needs:</b> Listening attentively to customers to determine their true needs, understanding the customer's point of view, asking appropriate probing or checking questions to ensure understanding, and discerning facts from assumptions to accurately determine what will satisfy the customer.   | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |
| <b>Problem Solving and Responding to Customer Needs:</b> Gathering and reviewing relevant customer information, understanding meaningful relationships across information sources, generating and selecting effective options for solutions, providing accurate information, service, or products, or referring customers to appropriate personnel.  | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |
| <b>Ability to Learn and Apply Procedures:</b> Comprehending new job related information in a timely manner and correctly recalling and applying that information during customer calls.  | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |
| <b>Teamwork:</b> Working effectively as a team member by attentively listening to and sharing information with others to facilitate a cooperative environment, and to meet and exceed customer expectations.   | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |
| <b>Communication:</b> Expressing information in a clear and concise manner without rambling; speaking in a pleasant tone and volume; using effective voice inflection and enthusiasm; using correct vocabulary, grammar, and sentence structure.   | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |
| <b>Work Ethic:</b> Demonstrating a strong desire to contribute to the organization; demonstrating reliable and dependable behavior that contributes to the organization's image; behaving in an ethical and trustworthy manner; taking initiative on work tasks and responsibilities.  | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/> |

Please check the box that best describes the percentage of the Call Center Agent job covered by the skills listed above.

- 0 to 20%
- 21 to 40%
- 41 to 60%
- 61 to 80%
- 81 to 100%