

# Job Match Survey

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## *Team Leader Readiness Simulation*

Dear Participant,

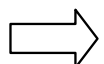
This survey is being used to determine the key work activities and skills required to effectively perform the Team Leader position in your organization. **The information you provide will be used for research purposes only and will remain confidential.** Information on this survey will be reported to 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.

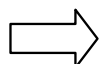
*Please check the box that best describes your job:*

- Team Leader
- Supervisor of a Team Leader
- 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 Team Leader position.

<u>Work Activity</u>	<u>Essential</u>	<u>Somewhat Essential</u>	<u>Not Essential</u>
1. Ensures that agents are logged in, available, and taking calls.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Remotely monitors phone calls of individual agents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Completes evaluation forms while listening to agents' calls (including live calls and/or taped calls).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Conducts side-by-side monitoring sessions with agents and coaches them through calls.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Reviews evaluations that were conducted by the Quality Department on specific agents (for example, written evaluations, taped calls).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Reviews reports that list individual agent performance statistics (such as talk time, sales/referral volume, quality scores, schedule adherence).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Reviews reports that list overall team statistics (such as service level, call volume, productivity, overtime).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Identifies high-performing agents to provide mentoring and additional responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Identifies low-performing agents to provide additional monitoring and coaching.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Gives immediate feedback to agents when observing extremely positive or negative behavior.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Provides structured, one-on-one feedback to agents to reinforce positive behaviors and to correct negative behaviors (for example, did not follow script, missed a sales/referral opportunity, gave incorrect information).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Monitors system screens used by agents and coaches them on how to navigate the system more efficiently.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Develops formal action plans with agents to document performance problems and corrective action plans.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Administers the discipline policy according to company guidelines, including suspension and/or termination of agents if necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Answers agents' questions (regarding issues such as customer issues, non-standard requests, system issues).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Provides written materials (for example, system information, product information) to increase agents' effectiveness.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



<u>Work Activity</u>	<u>Essential</u>	<u>Somewhat Essential</u>	<u>Not Essential</u>
17. Takes regular customer calls when appropriate (for example, to help manage call volume, to reward a high-performing agent).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Handles escalated customer calls and tries to resolve customers' issues when possible.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Conducts incentive programs (for example, contests, awards, team parties) to encourage optimal performance by agents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Posts results of individual agent performance (such as call volume, sales/referral results) to recognize high performers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Conducts informal, small-group training sessions with agents to educate them on various issues (for example, policy changes, new programs being implemented by clients, updates to the system, phone techniques).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Participates in formal, stand-up training sessions to train others (such as agents or peers) on specific topics.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Ensures that agents adhere to their scheduled break times.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Tracks agents' attendance records (including absences and/or tardies) to ensure they are within acceptable guidelines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Monitors call volume and makes immediate, short-term staffing adjustments if necessary (for example, reassigns agents, asks for overtime).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Assists agents with changing their work schedules (including short-term changes and/or permanent adjustments).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. Investigates time card discrepancies to determine the cause and the resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. Adjusts payroll records to ensure that agents are paid accurately, according to their actual time worked.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. Participates in meetings with peers and/or own manager to discuss ongoing issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. Conducts meetings with own team to communicate new information and motivate the team.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31. Completes administrative reports (for example, team statistics, borderline employees).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32. Completes regularly scheduled performance appraisals for agents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33. Takes actions that agents are not approved to do (for example, gives monetary credits to clients' accounts, unblocks accounts).	<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 Team Leader position.

<u>Skill</u>	<u>Essential</u>	<u>Somewhat Essential</u>	<u>Not Essential</u>
<b>Building Relationships:</b> Effectively interacting with team members with diverse backgrounds and temperaments, demonstrating a genuine interest in team members, maintaining open lines of communication with team members, and being an advocate for team members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Time Management:</b> Prioritizing work activities, completing a variety of tasks within short timelines, meeting deadlines, effectively handling frequent interruptions, and following up on commitments in a timely manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Coaching:</b> Identifying performance problems and their solutions, communicating positive as well as negative feedback, adapting coaching style depending on the situation, providing feedback that is specific and constructive, and encouraging all team members in incremental performance improvement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Problem Solving:</b> Generating effective solutions to problems, considering unique aspects of situations, negotiating compromises, suggesting alternative solutions, and balancing business needs with individual needs (e.g., team member needs, customer needs).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Communication:</b> Expressing information clearly and concisely (both orally and in writing), clearly outlining expectations, communicating negative information in a tactful manner, and listening attentively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Team Building:</b> Setting clear and challenging goals for the team, generating enthusiasm and excitement, modeling exceptional work behavior, creatively rewarding successes, providing help and resources to team members, and sharing the larger picture with team members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Decisiveness:</b> Strongly communicating expectations, quickly responding to situations, justifying decisions when challenged, and following through on decisions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Flexibility:</b> Working effectively in a fast-paced environment, adjusting team strategies to changing conditions, focusing on the positive aspects of change, and remaining calm during challenging situations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Analytical Thinking:</b> Analyzing and interpreting statistical data, focusing on details, relating various pieces of information together, identifying trends, and understanding the reasons behind problems as well as successes.	<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, and 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 Team Leader job covered by the skills listed above.

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