

**Confidential Results**

## **CareeR<sub>x</sub><sup>™</sup> Developmental Report**

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### **Teller Vision Simulation**

**Results for:**

**John Doe  
ID# 123-45-678  
July 29, 2006**



**Employment Technologies**  
CORPORATION

## CareeRx Individual Performance Plan

**Customer Focus** — Interacting with customers in a professional manner, building rapport, meeting customer needs, and ensuring customer satisfaction and loyalty.

### Recommended Activities for Customer Focus

**To Be Completed By:**      **Completed:**

#### On-the-Job Activities

- Ask to observe effective tellers as they interact with customers. List the statements these tellers use to put customers at ease and to identify customer needs. \_\_\_\_\_
- Place yourself in the role of the customer. List the customer service issues that would be most important to you. \_\_\_\_\_
- Learn customer names by using the customer's name at least twice during the transaction. \_\_\_\_\_
- Summarize or re-state requests and/or issues when speaking with customers. \_\_\_\_\_
- Identify different types or styles of customers that you have encountered. Determine the approach that seems to work best with each style or type of customer. \_\_\_\_\_
- Reflect on a customer interaction that didn't go well. Identify 1 or 2 things you could have done differently that might have improved the outcome. \_\_\_\_\_
- Identify the most difficult customer situation you have encountered. Ask your supervisor and coworkers how they would have handled the situation. Keep a list of effective approaches. \_\_\_\_\_
- Identify the most common customer issues or problems you encounter. Make a list of effective solutions for each problem or issue. \_\_\_\_\_
- Review customer comment cards. \_\_\_\_\_
- Ask supervisor to monitor your interactions with customers, then review performance together. \_\_\_\_\_

#### Other

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