

# Customer Service Professionals

A joint project conducted in partnership  
with Peter Berry Consultancy, International  
Customer Service Professionals and  
Hogan Assessment Systems

October 2007



MAKING A REAL DIFFERENCE

***We provide profiling and consulting services that make a real difference in leadership, business planning, people and culture.***

***Whoever you are, we can add value...***

We work with a wide range of private and public organisations, from multinational corporations and government bodies to small businesses.

***Consulting services we offer:***

***Improving your fitness***

- Leadership development
- Front-line supervisor development
- Coaching and mentoring
- Facilitated business planning
- Human resource management
- Recruitment and selection solutions
- Industrial relations / enterprise agreements
- Cultural change
- Change management
- Team building
- Keynote addresses
- Conference / workshop facilitation

***Profiling services we offer:***

***Measuring your fitness***

- Employee Opinion Survey
- 360° Management Review
- 180° Review (Co-worker Review)
- Hogan Leadership Series
- Hogan Assessment for selection & development
- Customer Satisfaction Survey
- Internal Customer Survey
- Performance Excellence Management Survey
- Exit Interviews

## Executive Summary

In September 2007, Peter Berry Consultancy, in conjunction with Australia's International Customer Service Professionals Organisation and Hogan Assessment Systems (USA) conducted a unique research project aimed at defining the personality of highly successful customer service professionals. Our challenge was to find high performing customer service professionals, get them to complete three Hogan Assessment profiles and produce benchmark data that could then be compared to other norms to establish their points of difference.

Participating companies included great brand names such as ANZ, Ella Bache, Myer and Qantas.

From a research perspective we were keen to establish what gives customer service professionals a winning edge in terms of personality. We profiled both supervisors and employees and have been able to benchmark the data against American norms and against data for Australian managers.

Background information and the results form the basis of this paper. In short, we are able to offer the following observations:

1. The supervisors have very strong people skills and naturally have warmth. They are highly sociable and enjoy social interaction. They are diplomatic, kind and thoughtful which will make the customer experience positive. They will find it interesting and rewarding to get along with their customers.
2. The supervisors love working in teams, networking and having a sense of belonging. This will translate to empathic experiences with customers. They will have a sense of affiliation with customers.
3. The supervisors have strong emotional composure and a tolerance for stress (high EQ.) They will handle difficult customers and conflict in a mature manner and without losing their cool. They will be stable and resilient...you will not see them 'spitting the dummy.'
4. The supervisors are hedonistic, they are motivated by enjoying the good things in life. They are also driven by quality and the quality of look, touch and feel. They will be driven to create very pleasant and favourable customer experiences.
5. The supervisors have strong personalities and will make a high impact. Their personalities will shine and sparkle and will be high impact. This will create favourable customer service impressions.
6. The employees also share the same profile as their supervisors in points 1-5. The employees are searching for more recognition (will appreciate a 'thank you') and are less ambitious (content with their lot.)
7. Another point of difference is that the supervisors are more altruistic (concerned about the welfare of others), less commercially driven (not so concerned with dollars) and less scientific (will use gut feeling.) The supervisors are genuinely driven by a desire to serve.
8. The supervisors have scored lower on ambition, power and making money, which could hold back a potential career in senior management. This could be a development opportunity if we were coaching.
9. When comparing the American data for their high performing customer service professionals, we found their adjustment levels to be higher (stress management.) Their interpersonal sensitivity (tact and diplomacy) scores are higher. They also scored higher for conscientiousness and a more inquiring analytical approach which means that they will do things 'by the book' and stay up to date. They have a lower sociability score which means they can be task-focused.
10. The Australians seem to differ from the Americans by being more alert, outgoing, spontaneous and flexible.

The participants were chosen on the basis of their high performance, and were nominated by their employer. Our conclusion is that these people are driven to giving great service through direct relationships with customers. Their personalities are well suited to giving service, building relationships, managing expectations, handling complaints and creating those special 'moments of truth' that create favourable impressions, repeat business and referrals.

We believe that personality predicts performance. Happy people produce happy customers and healthy bottom line results. Selection, development and retention of high performing customer service professionals are key to customer engagement and retention which translates into financial performance. Personality assessment can help to develop a winning team.

## Peter Berry Consultancy

We provide profiling and consulting services that make a difference in leadership, business planning, people and culture. Peter Berry Consultancy has been operating since 1990. We've worked with blue-chip organisations including Qantas, Toyota, Coca-Cola, Nestlé, General Electric, Colonial, ASIC, Australia Post, BHP Billiton, Mt Eliza Business School and Fletcher Construction. Our proven approach is based on our:

- Professional with results driven outcomes
- Realistic, tailored solutions
- Knowledgeable, experienced people
- Expert facilitation and support
- Flexible, creative thinking
- Plain English communications
- High-impact solutions that consistently generate real returns on investment

We work with a wide range of private and public organisations, from multinational corporations and government bodies to small businesses. We're based in Sydney, with associates across Australia and internationally. Our strong network helps us deliver our services across Australia, New Zealand and globally.

If you're standing still, you're going backwards. Your business success relies on everyone in your organisation striving for improvement. That means constantly raising the bar and creating an environment of continuous improvement. Getting your act together on leadership, business planning, people and culture opens the way for:

- More efficient processes
- Greater customer satisfaction
- Improved bottom line results

Our consultants work with organisations to develop potential and maximise performance. We assist organisations on a range of consulting from entry level selection through to strategic planning at CEO and Board level. Our approach is to use world class instruments to assist organisations delivering sustainable returns and focus on real bottom line results.

## Hogan Assessment Systems

Hogan Assessment Systems, Inc. (HAS) is a multidisciplinary consulting firm that combines the science of personality assessment with practical business experience to assist organisations manage a wide range of human resource functions and issues. Their technical and professional expertise, diverse experience, practical perspective and creative solutions to organisational issues support their long-standing reputation for excellence. HAS have developed the highest quality products which they have customized to meet business needs and are supported through industry-leading research.

Based in Tulsa Oklahoma and Jacksonville, HAS was founded in 1982 by Drs. Robert and Joyce Hogan. The Hogans are pioneers within the occupational, personality and motivational testing arena. They speak regularly at professional psychology conferences, are extensively published, often quoted by significant publications and are considered experts in the field.

HAS have additional affiliate offices located in the United Kingdom, Sweden, Denmark, Germany, Turkey, Czech Republic, New Zealand, Australia, South Africa, Canada, Alaska, Singapore, Kuala Lumpur, Singapore and Hong Kong. The HAS products are currently available in 20 languages. They ensure the support of customers worldwide through partnerships with consulting psychologists and industry professionals who have been certified to use their assessments.

HAS observes the highest professional standards to ensure test validity. Built on rigorous research standards and ethics, HAS continually challenges itself to ensure that the highest standards of technical quality have been maintained with all published assessments. Hogan Assessment Systems comply with professional and organisational standards, ethical and statistical guidelines, and meet the uniform guidelines on employee selection procedures as published in the US. The HAS instruments have been positively reviewed by peers in the Buros Mental Measurement Yearbook.

As a provider of psychometric instruments, HAS has an excellent record in selection and assessment. Its instruments have never been successfully challenged in any jurisdiction or country.

HAS has extensive experience in the following industries:

Communications	Financial	Pharmaceutical
Construction	Government	Retail
Consulting	Healthcare	Security and Law
Energy	Hospitality	Technology
Education	Manufacturing	Transportation

## ICSP (International Customer Service Professionals)

ICSP is Australia's leading organisation for the development of customer service in a broad range of organisational settings.

International Customer Service Professionals (ICSP) is a professional body promoting Customer Service Excellence. Facilitated through international membership and alliance partners, ICSP offers an infinite resource to the Australian and New Zealand service industry. ICSP has a well earned reputation which is showcased through professional networking events, accredited training and education programs, benchmarking and best practice forums.

ICSP are proud to be 'the International advocate' for Customer Service issues- for service deliverers and service receivers.

ICSP offers service professionals an opportunity to measure against ICSP's best practice standards through its International Service Awards. These are celebrated throughout the global celebrations of International Customer Service Week during the first week of October each year.

ICSP is a professional body that aims to enhance the importance of Customer Service through promoting the development and delivery of service excellence.

ICSP partner with top Australian organisations within the field of Finance, Insurance, Logistics, technology, retail and many more in order to promote, develop and deliver superior Customer Service Internationally.

ICSP hosts world class events, seminars and workshops throughout Australia and New Zealand all year round. Through innovative and educational presentations from key note speakers and industry experts- the ICSP events are a 'must attend' on every professional's calendar.

Tricia Olsen is the CEO and Founder of ICSP. She is a role model to customer service professionals world-wide and offers a passion, energy and drive for Customer Service that is second to none. Her wealth of knowledge and expertise in International Service Excellence is undoubtedly highlighted in her informative and inspirational Key Note presentations. Tricia has a well-earned reputation throughout the Service Industry has now delivered Customer Service Programs to over 20,000 delegates internationally. Tricia also surrounds herself with an optimistic and highly motivated team of Service Professionals and Service Organisations.

## Participants

Participants from the following organisations were nominated as high performing customer service professionals in their field.

ANZ	HBA	Nutrimetics
Australia Post	Jetstar Airways	Pfizer
B Digital	IAG	Qantas
BT Financial Group	La Trobe City Council	Qantas Link
BUPA Australia	Lend Lease	Sales Force Australia
Commonwealth Bank	Maddocks	Toll IPEC
Drake International	MBF	V/Line
Ella Bache	Medibank Private	Virgin Atlantic
Fracht Australia	Melbourne Cricket Club	Westfield Shopping Centres
Federation Square	Mutual Community	
Genesys	Myer (Retail)	

## Research on what it takes to be a high performing Customer Service Professional

Peter Berry Consultancy and Hogan Assessment Systems partnered with the International Customer Service Professionals (ICSP) to conduct a profiling study to find out what it takes to be a high-performing customer service professional and what it takes to supervise a high-performing customer service team. This is the first major study of Australian customer service professionals using a valid and reliable personality assessment across a range of industry sectors.

We looked at:

1. What makes an effective high performing customer service professional and supervisor compared to the general population
2. The distinction between high performing customer service professionals and those who manage them to understand their unique personality type.
3. Benchmarking the Australian customer service professionals against Hogan's extensive database which holds data on over 2.5 million people from 40 countries who have taken the Hogan Assessments. This includes Fortune 100 companies in the US, representative samples worldwide and some of Australia's best known brands.
4. Benchmarking against other Australian norms, in particular, other Managers.

Proven performers and supervisors of high performers were nominated and invited to complete the profiling tools provided by Hogan Assessment Systems. Participants met strict selection criteria and held a proven track record in excellence in delivering or managing customer service professionals. Many of the participants were regarded as customer service champions and/or had received awards for customer service excellence.

Customer service personnel are the primary interface and visible 'face' for organisations. Research indicates that not all employees are suitable for customer service roles. The level of customer satisfaction and cost to organisations from having employees who are average or low fit for customer service roles results in reduced levels of customer service and customer satisfaction, reduced sales, potential weakening of brand positioning and higher employee turnover.

Half of the analyses involve the results of the job analysis profiling tool (the "JET"), in which customer service professionals (incumbents) and supervisors, separately, were asked to profile what an ideal incumbent/supervisor would be like.

The other half of the analyses come from the incumbents/supervisors assessing themselves with Hogan's psychometric assessments. High-performing customer service professionals took the Hogan Personality Inventory (HPI) and the Motives, Values, Preferences Inventory (MVPI), and the supervisors took the HPI, MVPI, and the Hogan Development Survey (HDS). As the HDS is designed to be taken by individuals responsible for leading others, only supervisors completed this assessment.

Having the two sources of information provide an opportunity for a unique perspective into what high-performing customer service professionals and supervisors think they should be like and what they actually *are* like.



## Understanding Customer Service Professionals

The data revealed some very interesting results. The job analysis profiling revealed that high-performing customer service professionals (CSPs) say they *should*:

1. **Keep their cool.** Maintaining a positive attitude and remaining calm, cool, and collected is essential to providing excellent customer service.
2. **Know their stuff.** Only if a CSP fully knows the details of their role and their company's products/services can they provide timely and accurate information to the customer.
3. **Strategically socialize.** High-performing CSPs recognize the balance between building rapport/making the customer comfortable and efficiently addressing a customer's concerns and moving on.
4. **Have the "-bilities".** High-performing CSPs must take responsibility and show dependability while maintaining flexibility.
5. **Play well with others.** In order to work well in a team environment, it is critical to treat coworkers with respect and sensitivity in hope of receiving it in return.

When completing the psychometric assessments for themselves, we found that high-performing CSPs actually are:

1. **Effectively social and fun-loving.** Balancing the needs of the organization with their own, CSPs want to engage others and enjoy a fun work environment.
2. **Not as well-adjusted as they think they should be.** Contrary to the job analysis profile, CSPs are actually more likely to work with a sense of urgency and/or emotionality and be more open to criticism.
3. **Humble team players.** While not over-asserting their own importance, high-performing CSPs enjoy working as part of a team.
4. **Desirous and enjoying of flexibility.** High-performing CSPs want to feel that they are free to exhibit flexibility and creativity in the manner in which they perform their jobs.

## Understanding Customer Service Supervisors

To be successful, Supervisors of high-performing CSPs say they *should*:

1. **Lead by example.** Effective Supervisors draw upon their own experience as a customer service professional
2. **Be the captain and the cheerleader.** Effective customer service supervisors need to foster a positive and energetic team atmosphere.
3. **Be a straight shooter.** Supervisors have to be counted upon to deliver the bad news as well as the good news when it comes to handling customer concerns and concerns of their team members.

In reality, Supervisors actually are:

1. **Not all that different from CSPs.** Supervisors are more similar than different from CSPs. They, too, enjoy social, fun, team-based environments.
2. **Able to keep the ship steady.** In the sometimes fast-paced and unpredictable world of customer service, effective Supervisors provide the stability to the environment CSPs need to feel comfortable and perform.
3. **Not as business-oriented as they think they should be.** In contrast to the job profiling results, Supervisors are not overly concerned with factors of financial and business success.



## Comparing Supervisors and Customer Service Professionals

When comparing the profiles of Supervisors and CSPs, we learned that:

1. ***They're similarly sensitive and tactful.*** Both high-performing CSPs and their Supervisors exhibit the same good balance between being sensitive to the feelings of others but also being able to confront conflict when necessary.
2. ***Supervisors are a bit more thick-skinned.*** Perhaps after being “battle-hardened” by years of customer service, Supervisors appear to be slightly more thick-skinned and even-tempered than high-performing CSPs.
3. ***Supervisors are more so driven by a desire to serve.*** While not exhibiting the profile of the eternal Samaritan, Supervisors have the personality, skillset, and drive to put others before themselves.
4. ***Supervisors are more intuitive in their decision making.*** Supervisors exhibit the freedom in their decision making to rely on their feelings and intuitions when deciding the corrective course of action.

## Benchmarking ICSP Customer Service to the U.S.

To evaluate potential cultural differences, we also pulled together HPI data on successful CSPs in the US from the Hogan Archive. Results indicated that:

1. ***They're more similar than they are different.*** The average profile of the high-performing U.S. CSP is quite similar to the high-performing CSP and Supervisor. They share a common desire to succeed while remaining a good team player.
2. ***Australian CSPs are a bit more direct.*** U.S. CSPs appear to be more polite but also less comfortable with conflict than their ICSP counterparts.
3. ***Australian CSPs are a bit more flexible.*** U.S. CSPs seem to be a bit more adherent to the established scripts and guidelines of their jobs, while Aussies are creative and flexible.

# 1. What do they say it takes to be a top performer in customer service? (The Job Evaluation Tool, “JET”)

## 1.1 Analyzing the Job

Nineteen nominated top-performing Customer Service Professionals (CSPs) and twenty-four supervisors of top-performing CSPs completed Hogan’s standardized job analysis instrument, the Job Evaluation Tool (JET). Individuals who complete the JET responded to items therein contained to identify what is necessary to be a successful performer in the evaluated job. The JET consists of four components: (a) the Performance Improvement Characteristics (PIC), (b) the Derailment Characteristics Questionnaire (DCQ), (c) the Motivational Improvement Characteristics (MIC), and (d) the Competency Evaluation Tool (CET).

The PIC job analysis identifies (a) the personal characteristics needed to execute successfully the requirements of a job, and (b) the degree to which possession of these personal characteristics improves job performance. The PIC contains 48 items that map to the Hogan Personality Inventory (HPI). Hence, like the HPI, the PIC contains seven scales. Participants rated the PIC items using a scale ranging from “0” (*Does Not Improve Performance*) to “3” (*Substantially Improves Performance*). Table 1.1 briefly defines each of the scales that resides on both the PIC and the HPI.

**Table 1.1 HPI and PIC Scale Definitions**

Scale Name	Definition
<b>Adjustment</b>	<i>The degree to which a person seems....</i> calm and self-accepting
<b>Ambition</b>	self-confident and competitive
<b>Sociability</b>	to need or enjoy social interaction
<b>Interpersonal Sensitivity</b>	perceptive, tactful, and sensitive
<b>Prudence</b>	conscientious and conforming
<b>Inquisitive</b>	creative and interested in problems
<b>Learning Approach</b>	to value learning for its own sake

The DCQ job analysis identifies: (a) personal characteristics that can inhibit performance in a specified job, and (b) the degree to which these personal characteristics degrade job performance. Participants rated the 22 items on the DCQ using a scale ranging from “0” (*Does Not Degrade Performance*) to “3” (*Substantially Degrades Performance*). In contrast to the PIC, the DCQ instructions asked SMEs to rate personal characteristics based on the extent to which they *impair* job performance. Thus, characteristics that receive high ratings on the DCQ are more likely to detract from or inhibit effective CSP job performance. The items align with the eleven HDS scales, as shown in Table 1.2.

**Table 1.2 HDS and DCQ Scale Definitions**

<b>Scale Name</b>	<b>Definition</b>
<b>Excitable</b>	Concerns seeming moody and hard to please, being enthusiastic about new persons or projects and then becoming disappointed with them
<b>Skeptical</b>	Concerns seeming cynical, mistrustful, and doubting the true intentions of others
<b>Cautious</b>	Concerns the tendency to be conservative, careful, concerned about making mistakes, and reluctant to take initiative for fear of being criticized or embarrassed
<b>Reserved</b>	Concerns the tendency to keep to oneself, to dislike working in teams or meeting new people, and to be indifferent to the moods and feelings of others
<b>Leisurely</b>	Concerns seeming independent, refusing to be hurried, ignoring other peoples' requests, and becoming irritable if they persist
<b>Bold</b>	Concerns seeming unusually self-confident, having strong feelings of entitlement, and being unwilling to admit mistakes, listen to advice, or attend to feedback
<b>Mischievous</b>	Concerns seeming to enjoy taking risks and testing the limits, being easily bored, and seeking excitement
<b>Colorful</b>	Concerns seeming lively, expressive, dramatic, and wanting to be noticed
<b>Imaginative</b>	Concerns seeming to act and think in creative and sometimes unusual ways
<b>Diligent</b>	Concerns seeming meticulous, precise, and critical of the performance of others
<b>Dutiful</b>	Concerns seeming eager to please, ingratiating, and reluctant to take independent action or go against popular opinion

The MIC job analysis assesses the environment in which an employee works and the values that help define workgroup climate. These values include interests such as work quality, social interaction, helping others, profitability, enjoyment, accomplishment, recognition, technology, predictability, and conservative management values. Participants rated the 40 MIC items on a scale from "0" (*Does Not Describe the Work Group*) to "3" (*Substantially Describes the Work Group*). The 40 items align with the ten MVPI scales, as shown in Table 1.3.

**Table 1.3 MVPI and MIC Scale Definitions**

<b>Scale Name</b>	<b>Definition</b>
	<i>Motives are associated with....</i>
<b>Aesthetics</b>	an interest in art, literature, music, and humanities
<b>Affiliation</b>	a desire for and enjoyment of social interaction
<b>Altruistic</b>	involving concerns about others' welfare
<b>Commerce</b>	an interest in business and finance gains
<b>Hedonism</b>	producing an orientation for fun and pleasure
<b>Power</b>	a desire for success, accomplishment, and status
<b>Recognition</b>	a need to be recognized
<b>Science</b>	a value of analysis and the pursuit of knowledge
<b>Security</b>	a desire for certainty and predictability in life
<b>Tradition</b>	a dedication to ritual and old-fashioned virtues

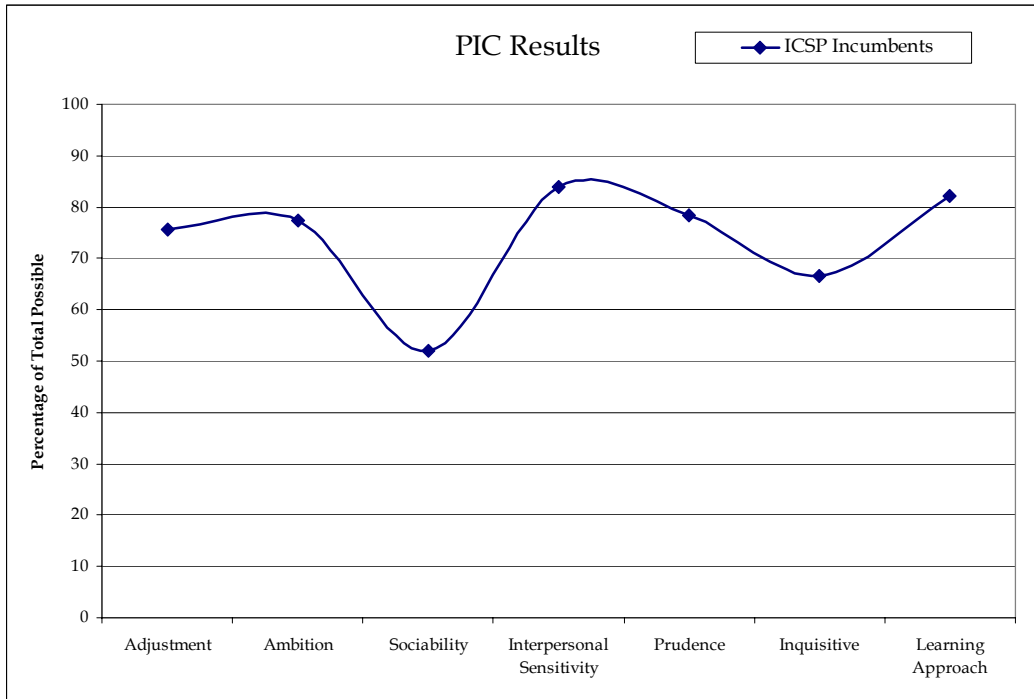
The CET allows participants to indicate the degree to which each of 56 competencies is related to successful job performance. A competency is defined as a performance theme or category that summarizes job-relevant behaviors, outcomes, and/or skills. Participants (Incumbents and Supervisors) served as raters and evaluated each competency, as it related to their jobs, using a five-point scale – ranging from "0" (*Not associated with job performance*) to "4" (*Critical to job performance*).

JET results in each group (Incumbents and Supervisors) were averaged and converted to a common scale that expresses what percent of the maximum possible score for each scale was obtained. A graphical representation of the PIC, DCQ, and MIC results are displayed in Figures 1.1-6, and Tables 1.4 and 1.5 display the competencies, per the CET, identified as being critical to job performance.

## 1.2 Customer Service Professional (Incumbent) JET Results

Figures 1.1-3 and Table 1.4 display the results of the JET for CSPs.

**Figure 1.1 PIC Profile for High-Performing Customer Service Professionals**



**Figure 1.2 DCQ Profile for High-Performing Customer Service Professionals**

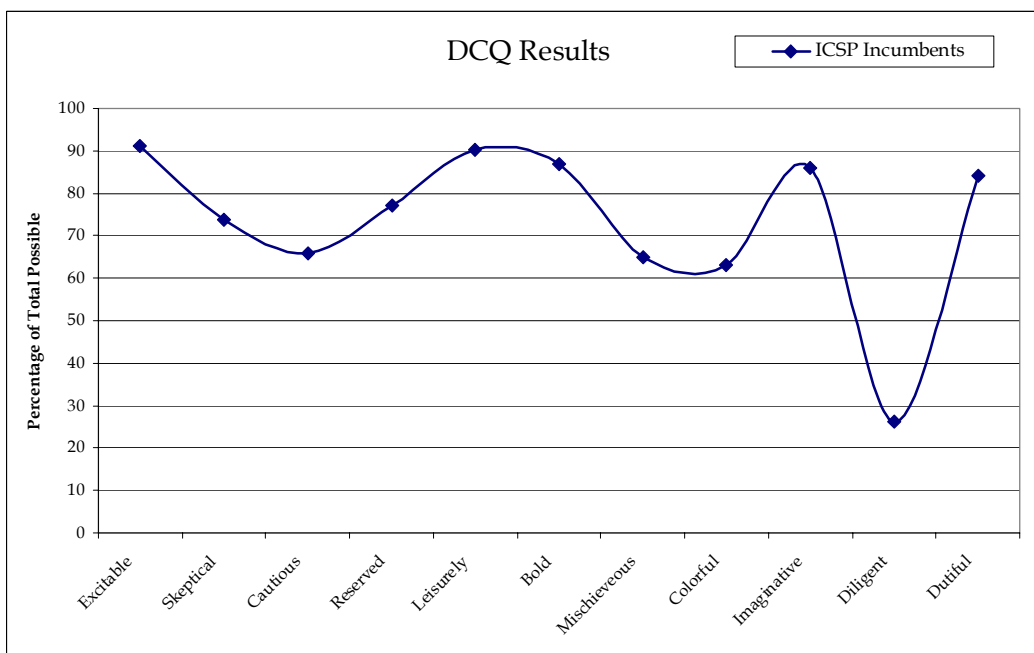


Figure 1.3 MIC Profile for High-Performing Customer Service Professionals

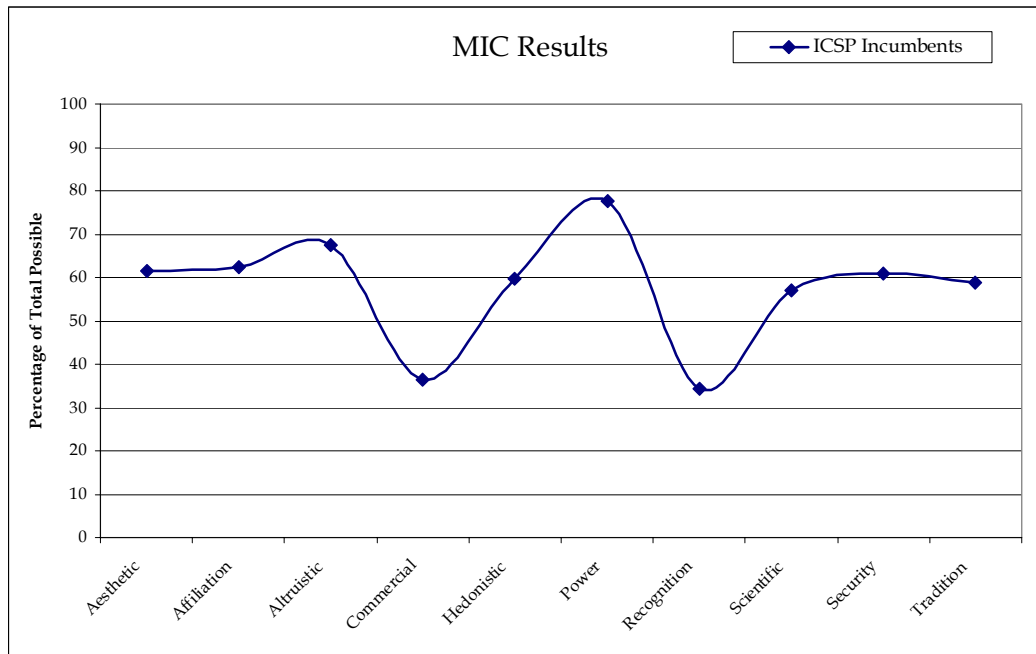


Table 1.4 Definitions of Critical High-Performing Customer Service Professional Competencies (CET Results)

CET Dimension	Definition
<b>Customer Service</b>	Provides courteous and helpful service to customers and associates
<b>Work Attitude</b>	Has a positive attitude toward work
<b>Stress Tolerance</b>	Handles pressure without getting upset, moody, or anxious
<b>Oral Communication</b>	Conveys information clearly and expresses self well in conversations
<b>Interpersonal Skills</b>	Gets along well with others, is tactful, and behaves appropriately in social situations
<b>Problem Solving</b>	Identifies and implements effective solutions to problems
<b>Job Knowledge</b>	Understands all aspects of the job
<b>Dependability</b>	Performs work in a consistent and timely manner
<b>Teamwork</b>	Works well in groups and is a good team player

## Conclusions

High-performing CSPs say it takes five things to be the best in their craft:

1. **Keep your cool.** Maintaining a positive attitude and remaining calm, cool, and collected is essential to providing excellent customer service. No matter how difficult the customer can be, high-performing CSPs keep their composure. With that, high-performing CSPs need to have thick skin so as not to take personally the berating that may come from irate customers. (PIC Adjustment; DCQ Excitable; CET Customer Service, Work Attitude, and Stress Tolerance)
2. **Know your stuff.** Customers expect their company liaisons, the CSPs, to know what they're talking about. Only if a CSP fully knows the details of their role and their company's products/services can they provide timely and accurate information to the customer. (PIC Learning Approach; DCQ Imaginative; MIC Scientific; CET Problem Solving and Job Knowledge)

3. **Strategically socialize.** Although the customer interaction is certainly social in nature, high-performing CSPs recognize the balance between building rapport / making the customer comfortable and efficiently addressing a customer’s concerns and moving on. (PIC Sociability and Interpersonal Sensitivity; DCQ Reserved; MIC Affiliation; CET Oral Communication and Interpersonal Skills)
4. **Have the “-bilities”.** High-performing CSPs must take responsibility and show dependability while maintaining flexibility. Customers need to feel that their service representative is taking ownership of the customers’ concerns and can be counted upon to follow-through with what is promised. CSPs must also be able to show creative flexibility in their interactions with customers, while not straying outside of what their authority allows. (PIC Prudence and Inquisitive; DCQ Leisurely, Imaginative, Diligent, and Dutiful; MIC Aesthetics and Power; CET Customer Service, Problem Solving, and Dependability)
5. **Play well with others.** CSPs rarely work completely alone, and more often work as part of a team. To provide the best customer service possible, CSPs need to be able to count on their teammates. From that, it is critical to treat coworkers with respect and sensitivity in hopes of receiving it in return. (PIC Interpersonal Sensitivity; DCQ Excitable, Skeptical, Reserved, Leisurely, and Bold; MIC Affiliation, Altruistic, and Hedonistic; CET Interpersonal Skills and Teamwork)

### 1.3 CSP Supervisor JET Results

Figures 1.4-6 and Table 1.5 display the results of the JET for CSP Supervisors.

**Figure 1.4 PIC Profile for CSP Supervisors**

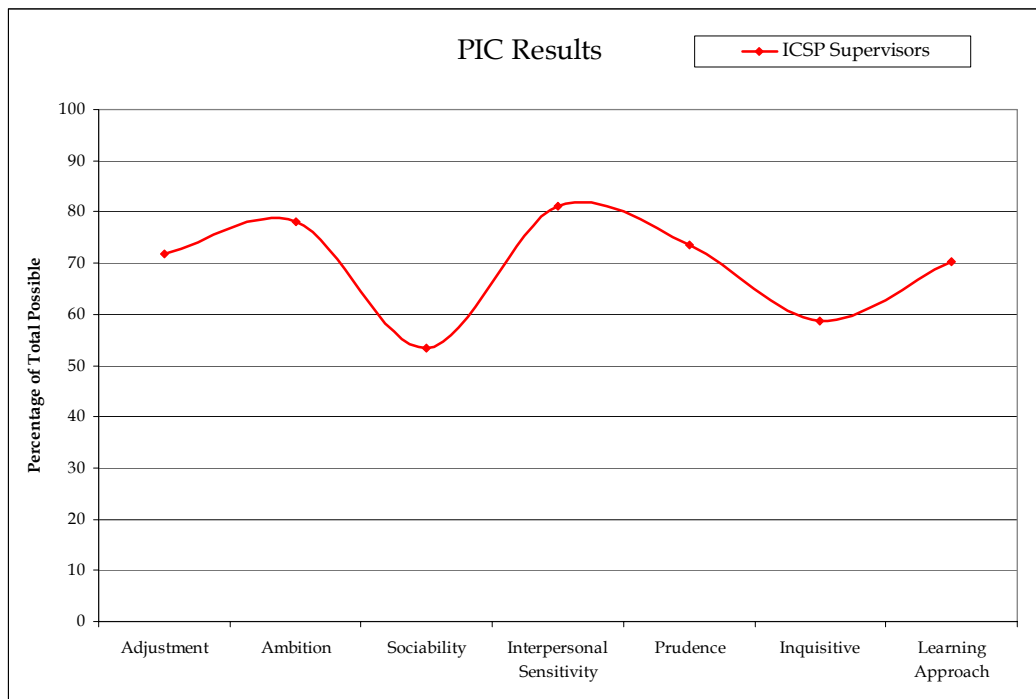


Figure 1.5 DCQ Profile for CSP Supervisors

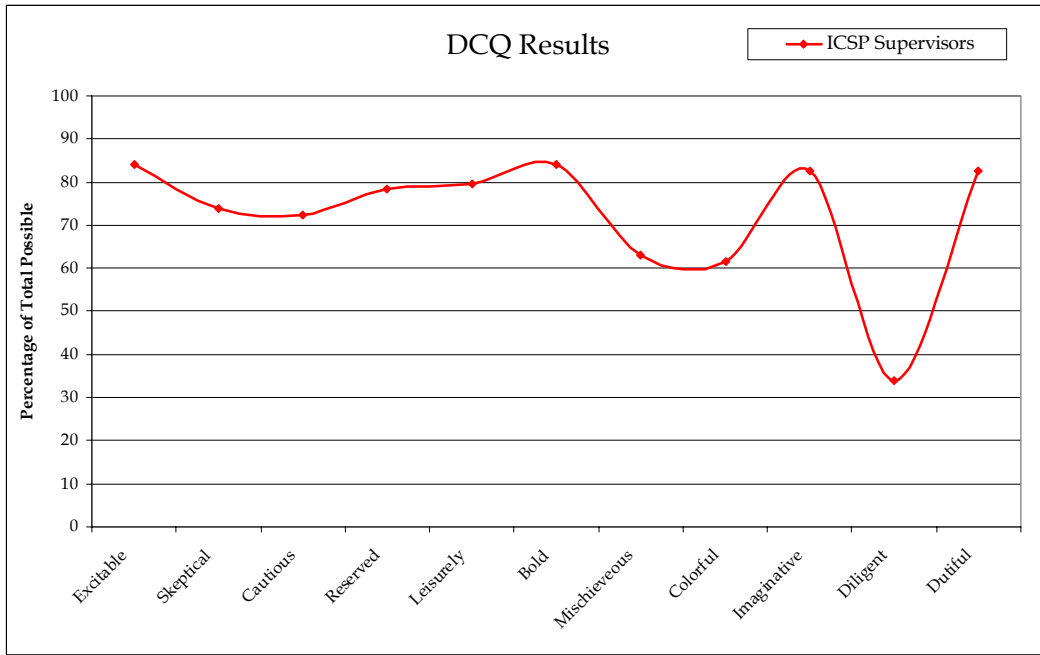
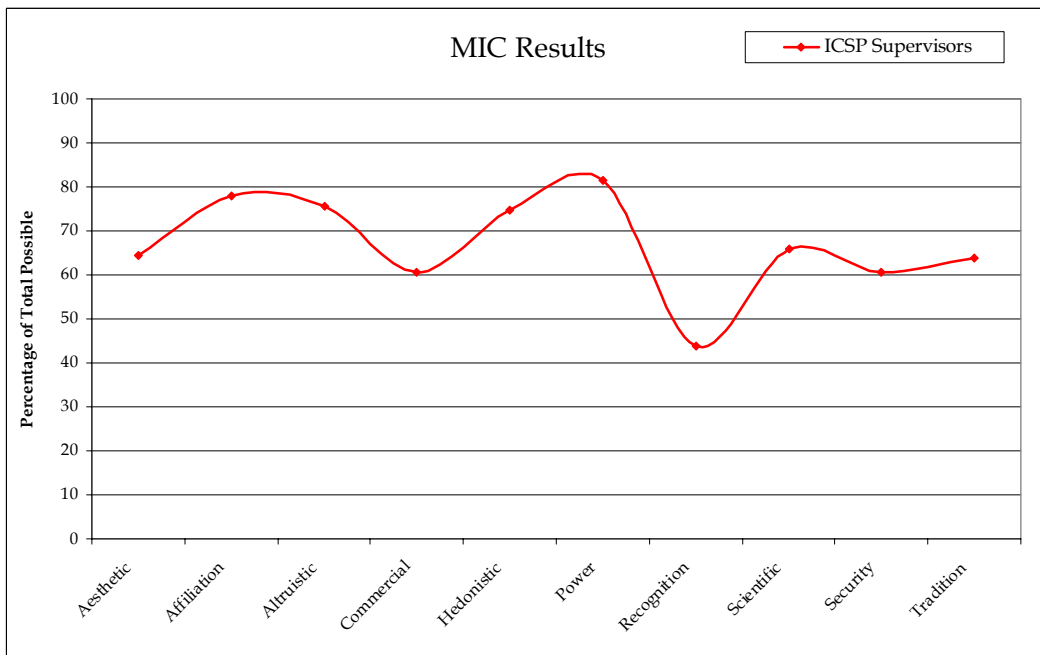


Figure 1.6 MIC Profile for CSP Supervisors





**Table 1.5 Definitions of Critical CSP Supervisor Competencies (CET Results)**

CET Dimension	Definition
<b>Customer Service</b>	Provides courteous and helpful service to customers and associates
<b>Work Attitude</b>	Has a positive attitude toward work
<b>Teamwork</b>	Works well in groups and is a good team player
<b>Trustworthiness</b>	Is honest and trustworthy
<b>Job Knowledge</b>	Understands all aspects of the job
<b>Stress Tolerance</b>	Handles pressure without getting upset, moody, or anxious
<b>Building Teams</b>	Uses appropriate methods to build a cohesive team
<b>Interpersonal Skills</b>	Gets along well with others, is tactful, and behaves appropriately in social situations
<b>Leadership</b>	Provides direction and motivates others to work for a common goal

## Conclusions

Supervisors of high-performing CSPs say it takes three things to lead a successful customer service team:

1. **Lead by example.** Most customer service supervisors spent a significant amount of time in the “trenches” as a customer service representative before assuming a supervisory role. Successful supervisors draw upon that experience to set the standard of how great customer service is delivered and how best to maintain composure during trying times. As most supervisors still have extensive customer interaction, it is in these moments where they can model the appropriate behavior. (PIC Adjustment and Ambition; DCQ Excitable, Skeptical, Bold, and Imaginative; MIC Power; CET Customer Service, Work Attitude, Stress Tolerance, and Leadership)
2. **Be the captain and the cheerleader.** Effective customer service supervisors need to foster a positive and energetic team atmosphere. Both positive and negative energy can be contagious, be sure you promote the right kind! Creating a climate of respect, success, and collegiality provides the right type of support for a high-performing customer service team. (PIC Ambition and Interpersonal Sensitivity; DCQ Excitable, Skeptical, Reserved, Bold, and Colorful; MIC Affiliation, Altruistic, and Hedonistic; CET Work Attitude, Teamwork, Building Teams, and Interpersonal Skills)
3. **Be a straight shooter.** Supervisors have to be counted upon to deliver the bad news as well as the good news when it comes to handling customer concerns and concerns of their team members. Faith in the supervisor can be shaken if they are not perceived as being forthright in their responses and interactions. After all attempts to satisfy the customer’s needs have been exhausted, an effective supervisor must be able to make the tough decisions. (PIC Prudence; DCQ Cautious, Leisurely, and Dutiful; MIC Power and Scientific; CET Trustworthiness and Leadership)

## 2. What are top performers in customer service actually like? (Hogan's psychometric assessments)

### 2.1 Profiling the Professionals

The ICSP nominated top-performing customer service professionals (CSPs) and supervisors of top-performing customer service teams to participate in this study to profile high performers and find out what the unique personality attributes are that make someone suited for providing excellent and consistent customer service. Unlike the previous section that asked participants to specify what would be ideal for customer service and supervisory jobs, the present analyses focus on what high performing CSPs and supervisors are actually like. This distinction in analyses provides for interesting insight and commentary on ideal versus actual profiles. To investigate these attributes, participants completed one or more of Hogan Assessment Systems' personality and values assessments.

The Hogan Personality Inventory (HPI; see Table 1.1 for scale definitions) was the first measure of normal personality developed explicitly to assess the Five Factor Model (FFM) of personality in occupational settings. The measurement goal of the HPI is to predict real-world outcomes. As such, it is an original and well-known measure of the FFM and is considered a marker instrument, not only in English, but for personality measures in other languages as well.

The Hogan Development Survey (HDS; see Table 1.2 for scale definitions), which is recommended for the selection/development of employees who are responsible for leading others, is designed to assess eleven dysfunctional dispositions that can impede job performance and lead to career difficulties. In the context of personnel selection, the HDS identifies applicants whose behavior, over time, will erode relationships with others because of flawed interpersonal strategies. These dysfunctional dispositions lie at the intersection of normal personality and the personality disorders. They can be viewed as extensions of the FFM personality dimensions, where these tendencies define the ends of the various five dimensions. Although the scales of the HDS are related to the dimensions of the FFM, each HDS scale reflects a syndrome with various related components, as seen in the scale definitions.

The Motives, Values, Preferences Inventory (MVPI; see Table 1.3 for scale definitions) is designed to serve two very important purposes. First, it allows for an evaluation of fit between an individual and an organization, given that greater similarity in an individual's values and those of the organization allow for a better and more successful person-organization fit. Second, the MVPI is a direct reflection of those areas that serve as motivators for an individual. Such information can be beneficial in a variety of organizational functions (e.g., placing individuals, building teams, designing reward systems, etc.).

HPI, HDS, and MVPI raw scale scores for each participant were converted to percentile scores based on Hogan's extensive normative dataset, thereby giving a reference point for where a scale score compares to the population. To find an overall profile for each group (Incumbents and Supervisors), the median percentile score was used. In small sample sizes like we have for the current study, means (averages) are too sensitive to outliers (aberrant scores). Also, averaging percentile scores that do not exist on a perfect interval scale, due to distributional properties, is not as mathematically sound as using the median.

### 2.2 The High-Performing CSP (Incumbent) Profile

Fifty-three high-performing CSPs completed the HPI and 49 completed the MVPI (see Figures 2.1 and 2.2). The profile provided some interesting information, especially when compared to the results of what CSPs *said* was ideal for high performance.

## Conclusions

1. **They're effectively social and fun-loving.** CSPs recognize the pitfalls of being too social (as indicated in the JET results), as it can interfere with productivity, but they are undeniably social creatures that thrive on interaction. For a CSP to provide excellent customer service, they must enjoy dealing with customers, so there is a logical requisite of sociability. In their social interactions, they are receptive and understanding and know how to handle conflict, not shying away from tactfully telling a customer or coworker how it really is. In addition to having plenty of social interaction, high-performing CSPs want to enjoy their work, so they infuse fun into their environments to guarantee it! (HPI Sociability and Interpersonal Sensitivity; MVPI Affiliation and Hedonistic)
2. **They're not as well-adjusted as they think they should be.** In the JET portion of the study, CSPs reported that remaining calm, cool, and collected was very important for performance. However, the profile revealed that, instead, high-performing CSPs are average on Adjustment. This can actually be seen as a strength, as they are more likely to work with a sense of urgency and be more open to criticism. While that may mean they are potentially susceptible to occasionally personalize customer complaints, it also means that they are more receptive to constructive criticism, which will help them to continuously improve. (HPI Adjustment)
3. **They're humble team players.** High-performing CSPs enjoy working in a team environment, and recognize their own value and limitations. They are comfortable being part of something bigger than themselves and not receiving all of the credit for good works, but still being recognized for their contributions. (HPI Adjustment, Sociability, and Interpersonal Sensitivity; MVPI Affiliation, Power, and Recognition)
4. **They enjoy flexibility.** While understanding the need to follow established rules and guidelines, high-performing CSPs want to feel that they are free to exhibit flexibility and creativity in the manner in which they perform their jobs. They will feel stifled in rigid, conventional environments. (HPI Prudence and Inquisitive; MVPI Security and Tradition)

### 2.3 The CSP Supervisor Profile

Thirty-two CSP Supervisors completed the HPI, 29 completed the HDS, and 29 completed the MVPI (see Figures 2.1-3). As previously mentioned, only Supervisors were asked to complete the HDS, as it is principally intended for assessment of supervisors and managers. To provide context for interpreting the profile of CSP Supervisors, archival data on Australian supervisors and managers (across multiple industries) was included in the graphs (Figures 2.1-3). Much like what we found with CSPs, the Supervisor profile provided some interesting information, especially when compared to the results of what Supervisors *said* was ideal for high performance.

## Conclusions

1. **They're not all that different from CSPs.** Overall, there were striking similarities between the profiles of CSPs and Supervisors. They, too, enjoy social, fun, team-based environments. Although somewhat surprising at first, it makes sense; who is most likely to assume supervisory customer service roles? The higher performing CSPs! CSPs with a proven track record of excellent service and performance are more inclined to be promoted.
2. **They keep the ship steady.** In the sometimes fast-paced and unpredictable world of customer service, effective Supervisors provide the stability to the environment CSPs need to feel comfortable and perform. They remain even-keeled in stressful times, but remain open to feedback from their customers and subordinates. (HPI Adjustment and Prudence; HDS Excitable, Skeptical, Cautious, and Reserved; MVPI Tradition)
3. **They're not as business-oriented as they think they should be.** From the JET results we learned that Supervisors recognize the need to value and pursue financial and performance success, but their profile indicates they aren't as concerned with those aspects as they feel they should be, and they occasionally lose sight of the practical aspects of their jobs. Although the degree to which Supervisors are responsible

for the business operations varies between organizations, this may be a key development aspect for Supervisors as they move up in the organizational hierarchy. (HPI Ambition, Prudence, and Inquisitive; HDS Leisurely, Mischievous, and Imaginative; MVPI Commercial and Power)

4. **They get noticed.** It seems quite clear that CSP Supervisors tend to have outgoing and gregarious personalities. They recognize the potential consequences of having too strong of a personality and, therefore, manage their behavior appropriately. Their extroversion can be a strength, and is one of the likely reasons they were noticed and promoted into a supervisory role. (HPI Sociability; HDS Bold, Mischievous, Colorful, and Imaginative; MVPI Aesthetics, Affiliation, and Hedonism)

## 2.4 Comparing CSPs and Supervisors

As previously mentioned, the profiles of high-performing CSPs and their supervisors were strikingly similar (see Figures 2.1 and 2.2). Some of those similarities are worth particular mention. Some differences do exist, too, although none of the observed differences were sizeable.

### Conclusions

1. **They're similarly sensitive and tactful.** Both high-performing CSPs and their Supervisors exhibit the same good balance between being sensitive to the feelings of others but also being able to confront conflict when necessary. Although these similar attributes may stem from the aforementioned argument of high-performing CSPs tending to become Supervisors, it is an important match to have in well-functioning teams. This means that Supervisors will give their subordinates the even- but soft-handed treatment they prefer to have and give to others. Effective communication is an important product of this match and can go a long way to help build a successful team. (HPI Interpersonal Sensitivity)
2. **Supervisors are a bit more thick-skinned.** Perhaps after being "battle-hardened" by years of customer service, Supervisors appear to be slightly more thick-skinned and even-tempered than high-performing CSPs. (HPI Adjustment)
3. **Supervisors are more so driven by a desire to serve.** While high-performing CSPs provide excellent, genuine service to their customers, it may come more from a disposition befitting of doing so, and less of an innate desire to serve others. While not exhibiting the profile of the eternal Samaritan, Supervisors have the personality, skillset, and drive to do so. Having this drive also predisposes Supervisors to establish an effective environment of teamwork and respect. (MVPI Altruistic)
4. **Supervisors are more intuitive in their decision making.** Perhaps because of their higher level of authority, Supervisors exhibit the freedom in their decision making to rely on their feelings and intuitions when deciding the corrective course of action. While exhibiting creativity, CSPs prefer to make more well-informed and established decisions in accordance with the most up-to-date information. (HPI Learning Approach; MVPI Science)

## 2.5 Comparisons to the U.S.

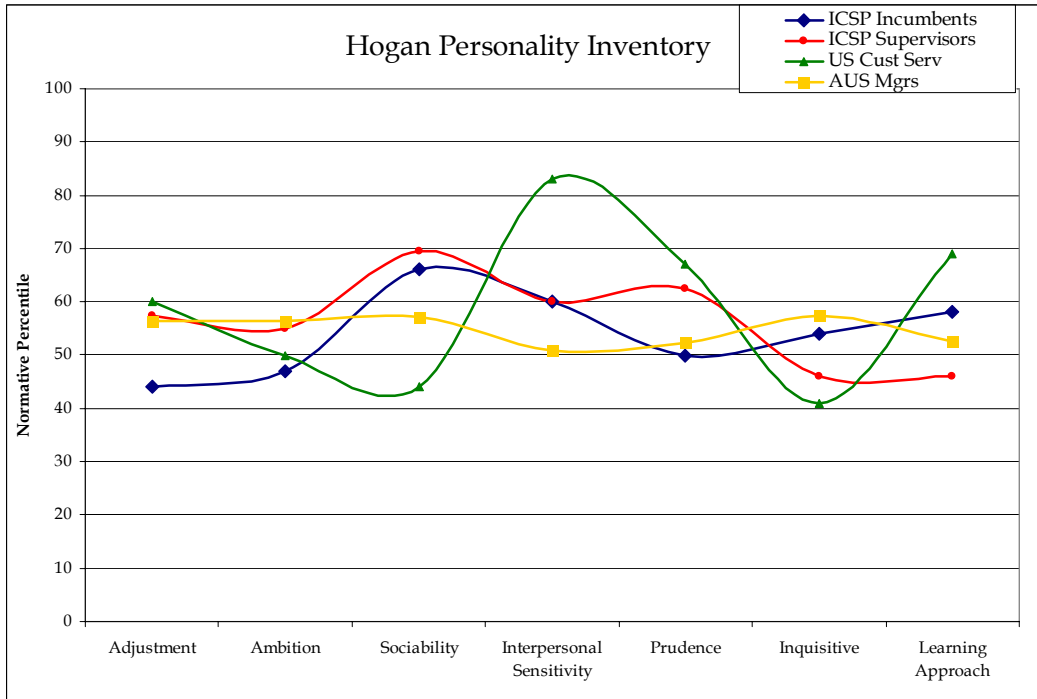
To explore the cultural specificity or universality of excellent customer service, Hogan pooled together data from multiple archival criterion studies conducted with customer service jobs in the U.S. The upper echelon of performers from each dataset was culled from the rest of the data and combined to form a dataset of high-performing CSPs in the U.S. Only data for the HPI were available, but interesting commentary can be offered on the similarities and differences observed when comparing the U.S. profile to that of the ICSP Incumbents and Supervisors (see Figure 2.1).

### Conclusions

1. **They're more similar than they are different.** By examining the profiles plotted in Figure 2.1, it is apparent that the average profile of the high-performing U.S. CSP is quite similar to the high-performing CSP and Supervisor. They share a common desire to succeed while remaining a good team player (HPI Ambition).

2. **Australian CSPs are a bit more direct.** Whether a true cultural difference or not, U.S. CSPs appear to be more polite and less comfortable with conflict than their ICSP counterparts. On the job, this may translate into slightly less soft-handedness from Australian ICSPs when dealing with difficult customers. (HPI Interpersonal Sensitivity)
  
3. **Australian CSPs are a bit more flexible.** U.S. CSPs seem to be a bit more adherent to the established scripts and guidelines of their jobs, while Aussies are creative and flexible. (HPI Prudence and Inquisitive)

**Figure 2.1 HPI Profile Comparisons**



**Figure 2.2 MVPI Profile Comparisons**

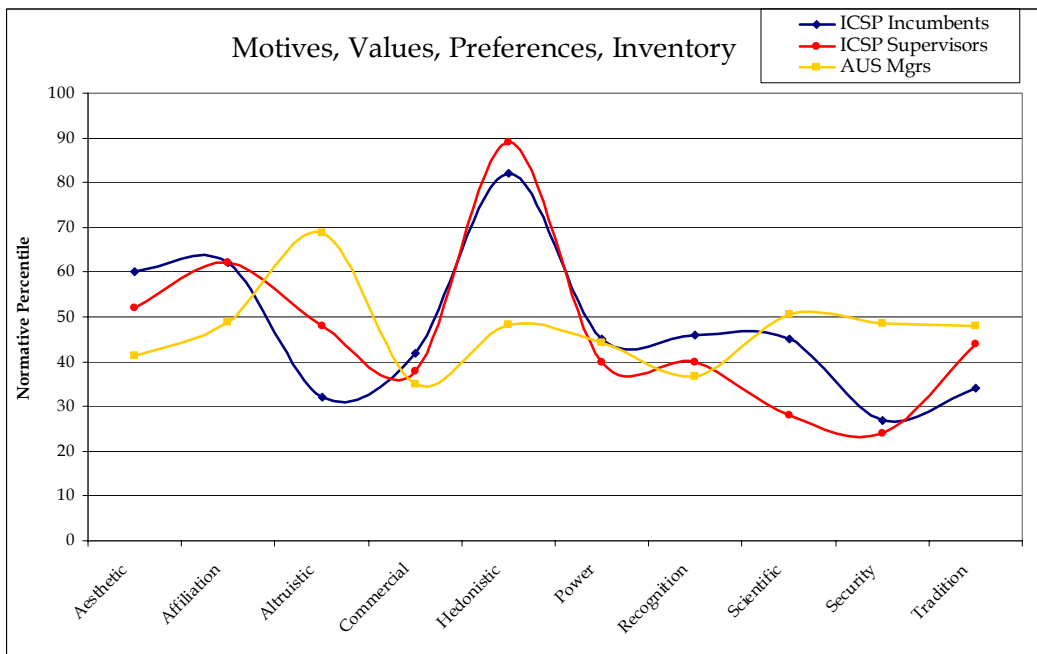
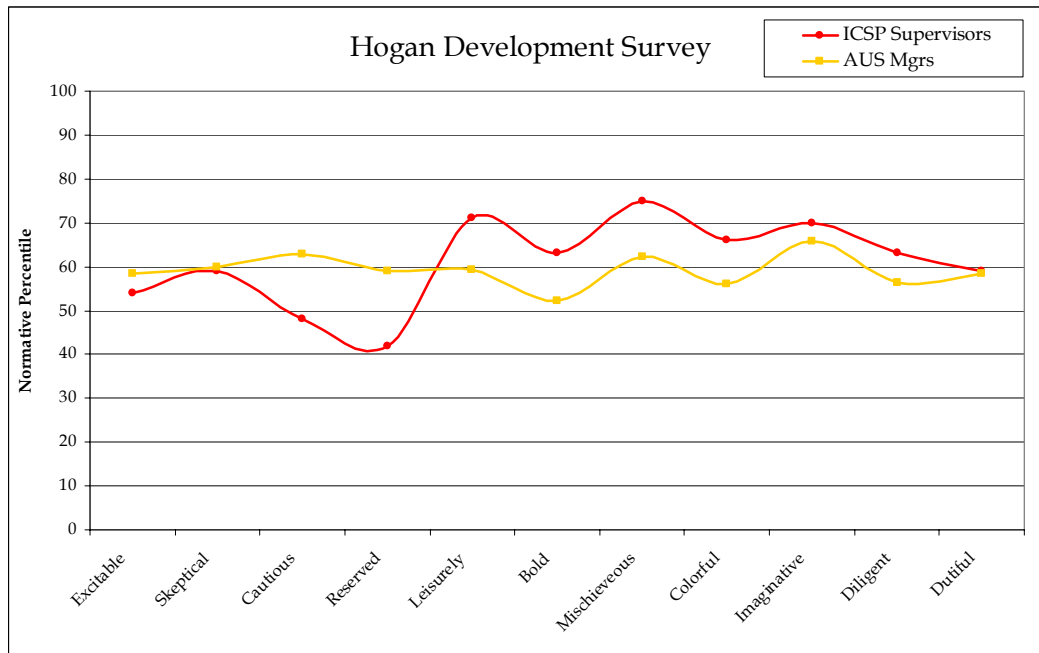


Figure 2.3 HDS Profile for CSP Supervisors



## Authors

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