



# TTI SUCCESS INSIGHTS™

Customer Service Version

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*"He who knows others is learned.  
He who knows himself is wise."  
—Lao Tse*

**John Doe**

Customer Service Rep

XYZ Company

3-12-2007



## INTRODUCTION

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Successful business depends on Customer Service. It is essential to understand that every employee is involved in customer service. Everyone in every organization is a customer of some kind. It has been proven that customers would rather switch to another company than tolerate poor service. Research indicates, even if there is no conflict, over 60% of all customers quit dealing with a business because of indifference on the part of some employee.

The ability to interact effectively with customers may be the critical difference between success or failure in our work life. Effective customer service begins with an accurate perception of our own work behavioral style. This report was designed to quantify information on how you see your own behavior in the workplace. That information may then be used for you to learn how others perceive your behavior. This knowledge will assist you in formulating strategies in meeting customer needs.



## GENERAL CHARACTERISTICS

*Based on your responses, the report has selected general statements to provide you with a broad understanding of your Customer Service Style. This section of the report identifies the natural customer service style you bring to the job.*

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John wants to be seen as a responsible person, and will avoid behavior that could be seen by others as irresponsible. When challenged, he becomes more objective. He dislikes volunteering his opinion until he has collected sufficient information to warrant an opinion. He may have difficulty sharing his feelings if it may disturb the relationship. John can be friendly with others in many situations, but primarily with groups of established friends and associates. He is sociable and enjoys the uniqueness of each human being. He wins through hard work and persistence. He likes to stay with one task until it is completed. He does not always like being placed in competitive situations. He tends to lose the "team feeling" when he is involved in direct competition. Loyalty and being a team player are usually his goals. He is a good, steady, dependable team member. John is eager to please others. He wants others to be satisfied and he may go out of his way to accommodate others, sometimes even to his own discomfort. He is often seen as practical and objective. Once "in the groove" of an established work pattern, John can follow it with seemingly unending patience. He prefers to help and support others rather than compete against them.

John may want to think over major decisions before acting. He must be convinced that actions will produce the desired result. Occasionally he will underplay bad news, if



## GENERAL CHARACTERISTICS

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telling it as it is will offend someone. He may fear it would disturb the relationship. He is persistent and persevering in his approach to achieving goals. He finds making decisions easier when he knows that others he respects are doing the same thing; he then has a feeling of stability and "family." John prefers to plan his work and work his plan. Others may find it refreshing to have him on their team. He tries to use balanced judgment. He is the person who brings stability to the entire team. Making plans and following those plans is important to him. He is good at analyzing situations that can be felt, touched, seen, heard, personally observed or experienced. His motto is, "facts are facts."

John is quick to pick up on group dynamics and skilled in fitting in with a group. He brings both speaking and listening skills to the group. He usually is considerate, compassionate and accepting of others; however, on some occasions can become stubborn. Stubbornness surfaces when his ideals and beliefs are confronted. He does not enjoy confrontation for confrontation's sake. He feels he can win through patience and resolve. He is not easily triggered or explosive, but he may conceal some grievances because he doesn't always state his feelings. John likes to know what is expected of him in a working relationship and have the duties and responsibilities of others who will be involved explained. Communication is accomplished best by well-defined avenues. He likes a friendly, open style of communication. He will be open with those he trusts; however, reaching the required trust level may take time.



# PERCEPTIONS

*A person's behavior and feelings may be quickly telegraphed to others. This section provides additional information on your self-perception and how, under certain conditions, others may perceive your behavior. Understanding this section will empower you to project the image that will allow you to control the situation.*

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## "See Yourself As Others See You"

### SELF-PERCEPTION

You usually see yourself as being:

Considerate  
Good-Natured  
Team player

Thoughtful  
Dependable  
Good listener

### OTHERS' PERCEPTION

Under moderate pressure, tension, stress or fatigue, others may see you as being:

Nondemonstrative  
Unconcerned

Hesitant  
Inflexible

And, under extreme pressure, stress or fatigue, others may see you as being:

Possessive  
Detached

Stubborn  
Insensitive



## DESCRIPTORS

Based on your responses, the report has marked those words that describe your personal behavior. They describe how you solve problems and meet challenges, influence people, respond to the pace of the environment and how you respond to rules and procedures set by others.

Dominance	Influencing	Steadiness	Compliance
Demanding Egocentric Driving Ambitious Pioneering Strong-Willed Forceful Determined Aggressive Competitive Decisive Venturesome Inquisitive Responsible	Effusive Inspiring <b>Magnetic</b> <b>Political</b> <b>Enthusiastic</b> <b>Demonstrative</b> <b>Persuasive</b> <b>Warm</b> <b>Convincing</b> <b>Polished</b> <b>Poised</b> <b>Optimistic</b> <b>Trusting</b> <b>Sociable</b>	<b>Phlegmatic</b> <b>Relaxed</b> <b>Resistant to Change</b> <b>Nondemonstrative</b> <b>Passive</b> <b>Patient</b> <b>Possessive</b> <b>Predictable</b> <b>Consistent</b> <b>Deliberate</b> <b>Steady</b> <b>Stable</b>	Evasive Worrisome Careful Dependent Cautious Conventional Exacting Neat Systematic Diplomatic Accurate Tactful Open-Minded <b>Balanced Judgment</b>
<b>Conservative</b> <b>Calculating</b> <b>Cooperative</b> <b>Hesitant</b> <b>Low-Keyed</b> <b>Unsure</b> <b>Undemanding</b> <b>Cautious</b> <b>Mild</b> <b>Agreeable</b> <b>Modest</b> <b>Peaceful</b>	Reflective Factual Calculating Skeptical Logical Undemonstrative Suspicious Matter-of-Fact Incisive Pessimistic Moody Critical	Mobile Active Restless Alert Variety-Oriented Demonstrative Impatient Pressure-Oriented Eager Flexible Impulsive Impetuous Hypertense	Firm Independent Self-Willed Stubborn Obstinate Opinionated Unsystematic Self-Righteous Uninhibited Arbitrary Unbending Careless with Details
Unobtrusive			



# CUSTOMER SERVICE FLEXIBILITY

*Since customers are different, the needs they have, and that must be met, are also different. The information in this section will help you identify types of customers and provide you with the strategies to meet their needs.*

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## "Improving Your Interactive Flexibility"

When interacting with a customer who has the following characteristics:

- Fast-paced speech
- Gives a strong first impression
- Impatient
- Direct
- Tries to control the situation

Factors that will improve Service with this Style of Customer:

- Speed up - omit some of the details
- Speak with confidence
- Flatter their ego
- Don't waste their time
- Stress Service - be fast and efficient
- Stress new products and service

Factors that will create tension or dissatisfaction with this Style of Customer:

- Not reacting quickly
- Speaking slowly and deliberately



# CUSTOMER SERVICE FLEXIBILITY

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## "Improving Your Interactive Flexibility"

When interacting with a customer who has the following characteristics:

- Friendly and talkative
- Impulsive
- Uses many hand gestures when speaking
- Gets emotional
- Imprecise about the use of time

Factors that will improve Service with this Style of Customer:

- Be more demonstrative with your facial gestures
- Be flexible with your time schedule....allow time for them to talk
- Let them know you enjoy their company
- Be prepared for them to be emotional
- Let them know you are interested in helping them

Factors that will create tension or dissatisfaction with this Style of Customer:

- Not sharing information freely
- Not displaying a sense of urgency



# CUSTOMER SERVICE FLEXIBILITY

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## "Improving Your Interactive Flexibility"

When interacting with a customer who has the following characteristics:

- Patient
- Easy going
- Uses an unemotional tone of voice
- Reserved
- Deliberate - methodical

Factors that will improve Service with this Style of Customer:

- Maintain a friendly environment
- Show a demonstrated need for urgency
- Present information in a systematic fashion
- If change is necessary, give many reasons and benefits
- Show sincere appreciation
- Stress security
- Assure them that many others are using your product/service

Factors that will create tension or dissatisfaction with this Style of Customer:

- Not demonstrating personal attention
- Being possessive of information



# CUSTOMER SERVICE FLEXIBILITY

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## "Improving Your Interactive Flexibility"

When interacting with a customer who has the following characteristics:

- Speaks slowly
- Asks questions about facts and data
- Deliberate in actions
- Uses few gestures
- Skeptical
- Suspicious

Factors that will improve Service with this Style of Customer:

- Be diplomatic and courteous
- Don't ask probing, personal questions
- Avoid criticism of their comments or choices
- Provide assurances of correct decisions
- Avoid sudden or abrupt changes
- Don't threaten them

Factors that will create tension or dissatisfaction with this Style of Customer:

- Sloppy work environment
- Overselling



## SITUATIONAL STRATEGIES

*Use this page for ideas on how to control the interaction between yourself and a customer when the following situations arise. When a customer is upset, you must first gain control of the situation - then read the customer's style and apply the appropriate strategy.*

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### CUSTOMER

Skeptical, Suspicious

Nervous, irritable, high strung

Pessimistic, grouchy, complaining

Egotistical, opinionated, high hat

Argumentative, blustering

Silent, secretive

### STRATEGY

Agree on minor points and expand. Be conservative in assertions.

Use a quiet, tactful, soothing manner.

Listen patiently, ask questions to find out their real concerns.

Flatter their ego. Concentrate on getting results.

Create response by challenging in a sincere manner.

Be more personal than usual to draw them out.



## ACTION PLAN

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Customers I have the most difficult time relating to could be described as:

- 1.
- 2.
- 3.
- 4.

To improve my Customer Service with them, I need to work on the following:

- 1.
- 2.
- 3.
- 4.

Other Customers who cause me discomfort are:

- 1.
- 2.
- 3.
- 4.

To improve my Customer Service with them, I need to work on the following:

- 1.
- 2.
- 3.
- 4.

Date \_\_\_\_\_ Signature \_\_\_\_\_





# Action Plan

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## Personal Development

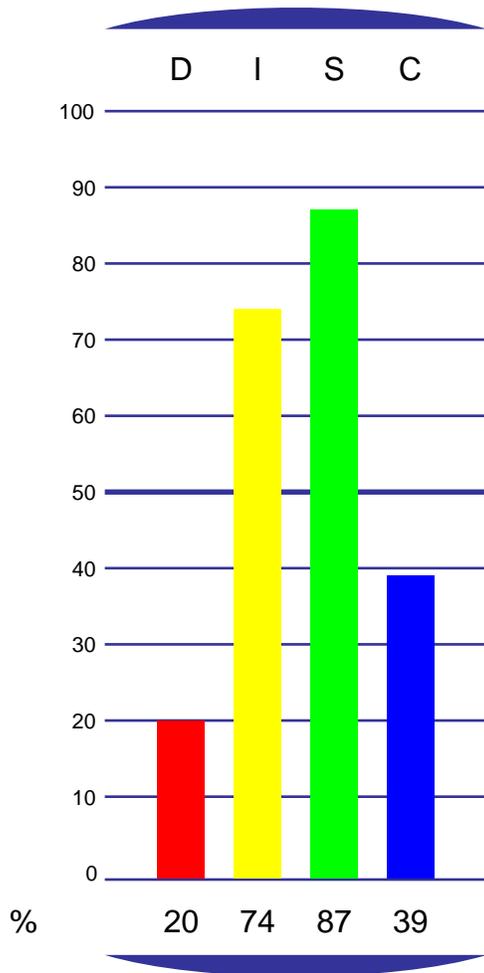
1. When reviewing my report for personal development, I learned the following key behaviors contribute to reaching my goals and the quality of life I desire: (list 1-3)
  
2. The following behaviors were revealed, which show room for improvement to enhance the quality of my life: (list 1-3)
  
3. When I make changes to these behaviors, I will experience the following benefits in my quality of life:
  
4. I will make the following changes to my behavior, and I will implement them by \_\_\_\_\_:



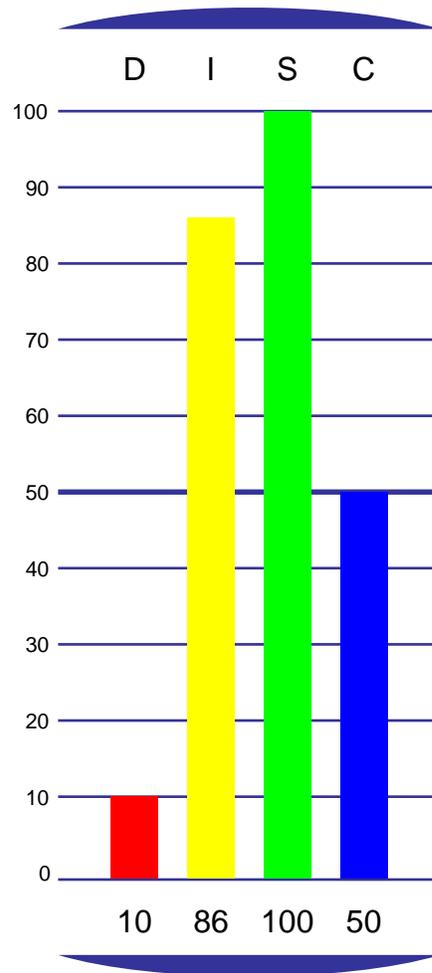
# STYLE INSIGHTS™ GRAPHS

**John Doe**  
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3-12-2004

**MOST**  
Graph I  
Adapted Style



**LEAST**  
Graph II  
Natural Style



Norm 2003



## THE SUCCESS INSIGHTS® WHEEL

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The Success Insights® Wheel is a powerful tool popularized in Europe. In addition to the text you have received about your behavioral style, the Wheel adds a visual representation that allows you to:

- View your natural behavioral style (circle).
- View your adapted behavioral style (star).
- Note the degree you are adapting your behavior.
- If you filled out the Work Environment Analysis, view the relationship of your behavior to your job.

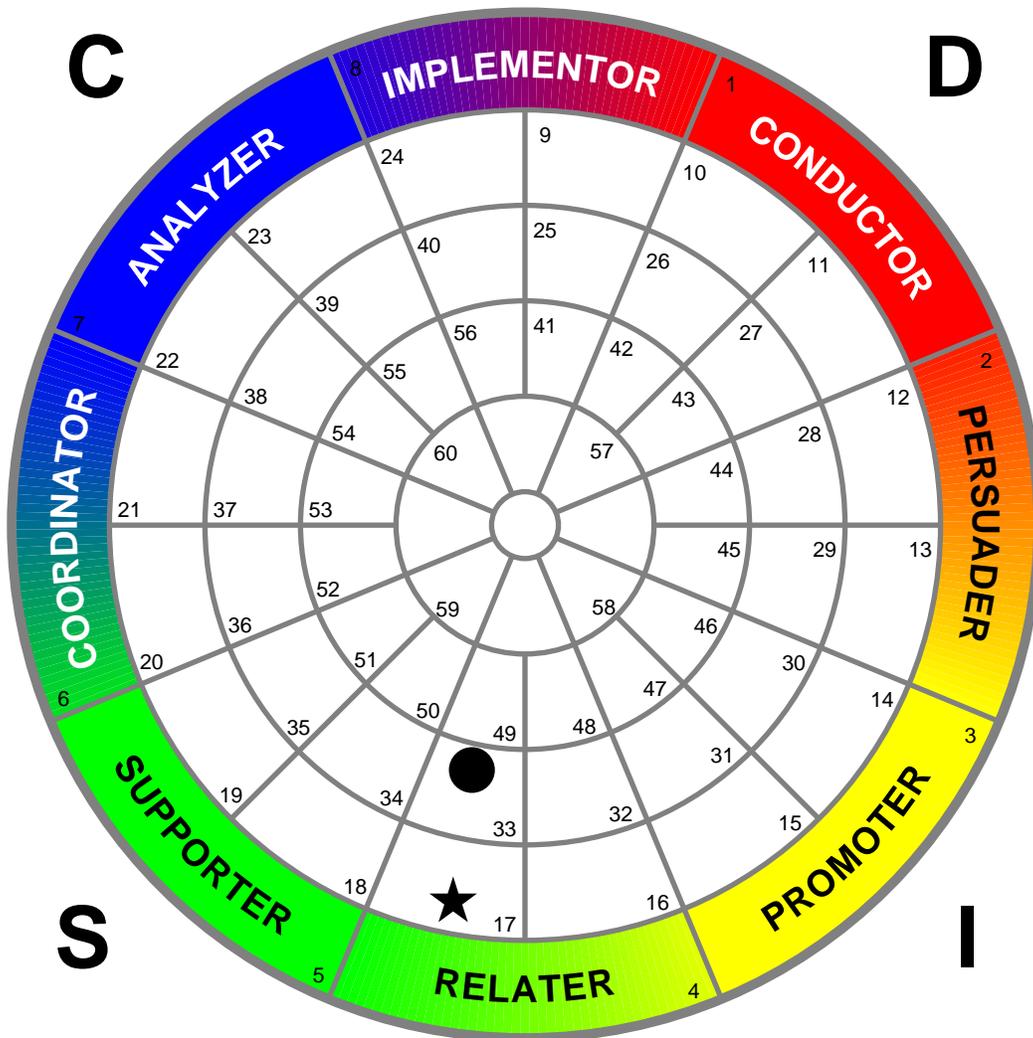
Notice on the next page that your Natural style (circle) and your Adapted style (star) are plotted on the Wheel. If they are plotted in different boxes, then you are adapting your behavior. The further the two plotting points are from each other, the more you are adapting your behavior.

If you are part of a group or team who also took the behavioral assessment, it would be advantageous to get together, using each person's Wheel, and make a master Wheel that contains each person's Natural and Adapted style. This allows you to quickly see where conflict can occur. You will also be able to identify where communication, understanding and appreciation can be increased.



# THE SUCCESS INSIGHTS® WHEEL

**John Doe**  
XYZ Company  
3-12-2004



Adapted: ★ (17) SUPPORTING RELATER  
Natural: ● (33) SUPPORTING RELATER (FLEXIBLE)

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