

Sales & Service Behaviors Assessment (Abbreviated)

The purpose of this assessment is to gauge the use and strength of critical sales and service behaviors by front line sales staff. It can also be used as a vehicle for aligning perceptions of managers versus front line employees. Each would take this assessment and results would be compared (either individual responses or a summary of responses by team, manager and/or organization).

This version is an abbreviated sample of our standard sales and service behaviors assessment. There are 40 questions in the standard assessment.

Directions: Please indicate the extent to which you demonstrate the following sales and service behaviors. If a statement does not apply to your situation, please respond by indicating not applicable – “N/A.”

	Always	Sometimes	Rarely	Never	N/A
1. I understand and demonstrate the service behaviors that are most important to our credit union.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I keep the member informed on what I am doing in terms of procedures and/or use of technology.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I ask members for their channel preferences so that I can use their preferred form of communication.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. When speaking with members, I avoid the use of technical jargon and/or acronyms that may be unfamiliar to the member.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I know what is expected of me with regards to selling products and services to members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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| 6. Getting information from members on their short and long term financial goals is an important part of my questioning strategy. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. I ensure understanding of how a product and/or service works with a member in order to limit future problems. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. When I hear a future sales or service opportunity, I set a specific follow up date and time with the member. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. I keep informed about changing policies and procedures that impact my ability to service members effectively. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. I report ongoing operational issues and/or member service challenges to my supervisor. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. I know and use information on competitors in order to educate and influence members. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. In working with a member over the phone, I limit the use of transfers and try to avoid putting the member on hold. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. I understand the key market segments our credit union is serving and targeting. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Expectations for sales and service follow up to members is clear to me. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. I am confident in my ability to tell potential members why they should do business with us. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

To learn more about our complete Sales and Service Behaviors Assessment, contact us at info@cvjsolutions.com.