



# HIRING THE CUSTOMER SERVICE PROFESSIONAL

Charles Rodriguez, Adams Keegan, Inc.

# Two Ingredient Parts:



- Understanding *Selection*      1 / 3    (\*HIRING)
- Building the *Relationship*      2 / 3    (\*ONBOARDING)

---

**1 Shared Expectation**

# Hiring Life Cycle

- Problem Solving the **N**eed
- Setting a **T**imetable
- **R**ecruitment Drive
- **I**nterview Process
- Decision **C**riteria and **J**udgment
- Onboarding and **S**haring Expectations



# problem solving the **NEED**

## & the candidate **PROFILE**

### ✓ The Problem...?

- ▣ What is the need

### ✓ Filling a Vacancy...?

- ▣ Why

### ✓ Expectations...?

- ▣ Different outcome
- ▣ Variable Cost

### ● Character Traits

### ● **K,S,A's**

### ● Experience

### ● Development Plan

# Character Traits & K,S,A's

When surveyed ,the  
**#1 trait** among all  
great customer  
service personnel is:

## Character Traits:

- #1 Trait is CONSCIENTIOUSNESS
- #2 Trait is AGREEABLENESS

## K, S, A's

- Mathematics
- Vocabulary

# Candidate Profile

The Candidate Profile allows us to best predict and manage the overall effect adding people and changing roles have on the culture and face of the organization.

- Essential Functions
  - Scope
- Relative Experience
  - Need to know
- Developmental Path
  - The Investment
- Behavioral Indicators
  - Predicting
- Response to Change
  - Constants and Variables

# Candidate Profile

Determining factors for sustained individual success within the organization.

Key questions:

*“How will this role affect my corporate culture?”*

*“What is my need for change?”*

- **Essential Functions**
  - ▣ Management
  - ▣ Administrative Support
  - ▣ Customer Services Scope
  - ▣ Technical Expertise
- **Experience**
  - ▣ Industry
  - ▣ Educational
- **Developmental Expectations**
  - ▣ Short Term & Long Term
  - ▣ Turnover Indicators
  - ▣ Organizational Commitment
- **Behavioral Indicators**
  - ▣ Character Traits
  - ▣ Motivating Factors
  - ▣ Patterns of Behavior

# Essential Behaviors to Assess

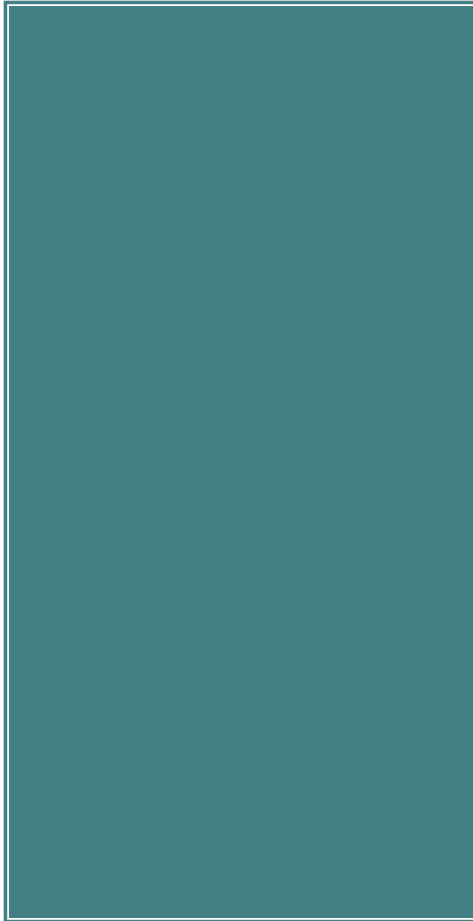
It is important to measure these behavioral traits with the knowledge, skills, and abilities inherent and learned,  
  
...AND how they fit your organization.

## Determining Factors:

- Trust
- Tact
- Empathy
- Conformity
- Focus
- Flexibility



# Recruitment



- Activity Calendar
  - ▣ Start date
  - ▣ Target Hire Date
  
- Identifying the Candidate Pool
  - ▣ Internal vs. External
  - ▣ Consider the Source!
  
- The Search
  - ▣ Targeted Posting
  - ▣ Managing Costs
  
- Control the Flow / Volume
  - ▣ “Boomerang Effect”
  
- Making Contact
  - ▣ Gauging Interest
  - ▣ “The Art of the Sell”

#2 on the list...

# Interviewing

Interviewing is a stressful activity because we evaluate each other on both a business and personal level.

Most interviews are unscripted but should still be planned.

## Interpersonal

- ❑ Understand your interview persona
- ❑ Develop an interview style and method

## Professional

- ❑ Know your evaluation criteria
- ❑ Interviewing precautions

# Interview Setup

Everyone involved should understand and prepare for his or her role in the interview process.

- Screening
  - Preparing the candidate
  
- Progression
  - When and How many?
  
- Participants
  - Individually vs. Group
  - Assignments

# Interview Styles & Methods

## Two Principal Methods

- **FACTUAL\***  
(traditional)
- **BEHAVIORAL**

## Styles

- Relational
- Adversarial
- Situational
- Open Ended

# Factual\*



- Specific experiences
- Right and Wrong
- Background questions
- Technical information

---

---

**INFORMATIVE**

# Behavioral



- *Character Traits*
- Suggestive of future behavior
- Insight into personal development
- Personal work style

---

---

**PREDICTIVE**

# How to Ask a Question?



## Situational

- Hypothetical
- Current scenario

## Open-Ended

- What...
- Why...
- How...

## Neutral

- Non Intuitive
- Preferential

### ! Good Practice

For situational, open and neutral questions: Prepare sample answers in advance of the interview. Identify the types of responses you are looking for and rank them. Use this as a component of the candidate's rating.

# Evaluating

All information gathered must be evaluated against the Candidate Profile.

Look for natural biases and determine relative effect.

- Criteria
  - ▣ CP
  - ▣ Determining factors for success
- Baseline
  - ▣ Consistency
  - ▣ Objective vs. Subjective
- Reference Points
  - ▣ Peers
  - ▣ Experiences



# Candidate Self Rate



The key is to ask the individual why and how they evaluate themselves. This allows the interviewer to ask follow up questions.

This method indirectly assesses questions about the individual's perceived strengths and shortcomings.

Rate yourself in the following areas on a scale of

**one to ten:**

Organization skills \_\_\_\_\_

Interpersonal skills \_\_\_\_\_

Creative thinking \_\_\_\_\_

Analytical thinking \_\_\_\_\_

Time Management \_\_\_\_\_

Technical skills \_\_\_\_\_

# “How You End Is How You Start”

## The Summary conversation

- Draws and Reservations
- Why we chose YOU
- The terms of the offer:  
pay, vacation, perks, etc.
- Contingencies

## Talk about a plan for success

- ✓ Set a start date
- ✓ Know what is happening  
between now and then...
- ✓ Let the new associate know  
that there is a plan and they  
will be a part of it.

# ONBOARDING and LEADERSHIP

Tactic and Strategy

# Personal Benefits of Onboarding



- Greater familiarity with roles and responsibilities
- Adoption and integration into company culture
- Overcoming obstacles to building relationships
- Opportunity to align goals
- **Engagement** and sense of value

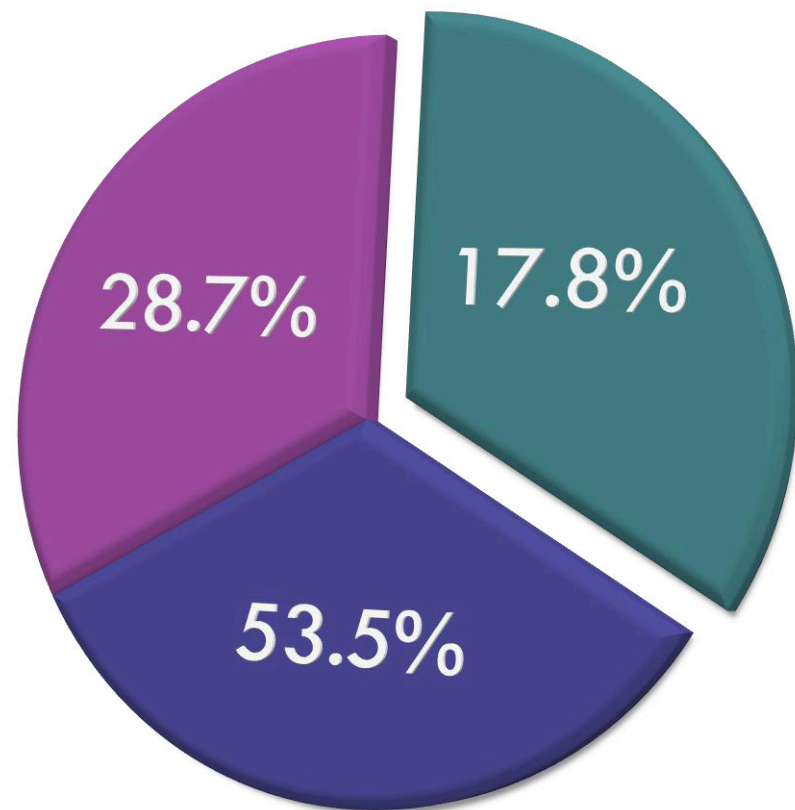
# Engagement

According to Gallup Polls:

**53.5%** characterize themselves as **Not Engaged**: “Giving just enough to get by”.

**17.8 %** characterized themselves as **Actively Disengaged**: “Causing problems and creating challenges”.

**28.7%** characterized themselves as **Engaged**: “Love the job and say so to a stranger if asked”.



# Leadership

---

Employees choose to engage largely based on the leadership they receive.

## Engagement Leadership

- ❑ Consistent messaging
- ❑ Failure is an option
- ❑ Mentor other leaders
- ❑ Manage change
- ❑ Facilitate

# Relationship Test



- First and last name of every employee
- Name of spouse, children, or pets
- Most significant professional event
- Most significant personal event

**How long would someone have to work for you to learn that information?**

# Tactics of Onboarding

## When to ENGAGE

- First day, first week
- 30 days
- 90 days
- 6 months
- 5 Years

## Managing Expectations

### Clearly communicate

1. Duties that you expect on a regular basis
2. Goals that you expect to be successfully achieved
3. Practices you expect to see



# Impact

Ideas that last generate the highest levels of engagement.

Deep, lasting impact is the secret weapon of the Engagement Leadership

## LASTING ENGAGEMENT

- Have an objective
- Know your listener
- Choose the best approach
- **Use a hook**



THANK YOU