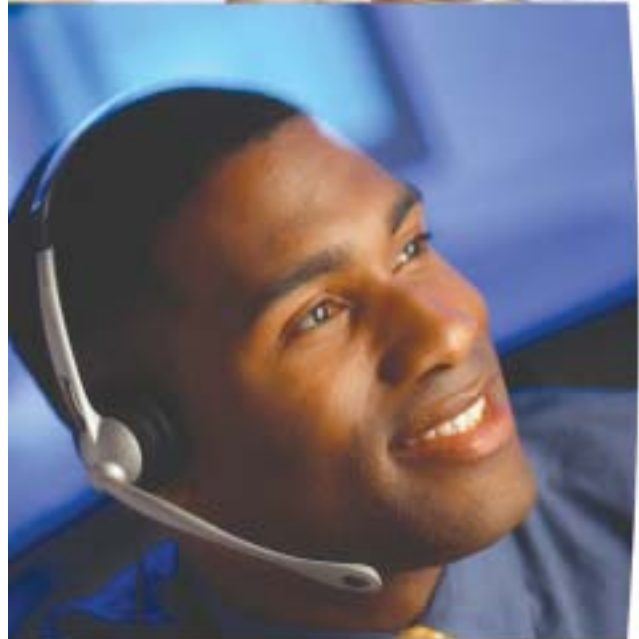


Customer Service  
**Perspective**<sup>™</sup>

## Executive Summary



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# CUSTOMER SERVICE PERSPECTIVE™ EXECUTIVE SUMMARY

## INTRODUCTION

Serving the customer is an important endeavor for all employees, regardless of their individual responsibilities. At some point, an employee is likely to be in a position to represent his or her company to a customer, client or other outside agent. While the opportunity to directly interact with such people may vary from job to job, any outside contact should be a comfortable and satisfying experience for the customer. The impression made by employees may be characterized by behaviors common to each of us. Assessments designed to identify these behaviors, especially with regard to customer contact can be helpful for enhancing the quality of any workforce.

**The Customer Service Perspective** was developed to help select individuals, regardless of their job titles, who will be successful in fulfilling the service needs of your customers. The report covers the test taker's *Company Service Perspective* (and its alignment with that of the company), two basic work-related *Proficiencies* and eight important *Behavioral Characteristics: Trust, Tact, Empathy, Conscientiousness, Conformity, Focus, Courtesy and Flexibility*. Additionally, a *Distortion* scale is added to gauge the pattern of responses of the test taker for implied positive impression or "looking good" on the test.

Employees who are well matched to their position tend to have higher attendance records, less turnover, higher job satisfaction and superior job performance. Both the employee and the employer share the benefits of enhanced person-job fit.

As part of the Profiles International, Inc. line of products for employers, the **Customer Service Perspective** is designed to facilitate achieving the best possible job fit. Our clients use the **Customer Service Perspective** to develop effective work teams, design optimal customer service, sales and other departments based on their employees' service perspective, help supervisors determine which approach will work best when working with a particular employee, help develop customer service training plans and much more.

The **Customer Service Perspective** is the product of collaboration between several test development psychologists and specialists coordinated by Profiles International, Inc. The instrument investigates several areas (*Behavioral Characteristics, Basic Proficiencies* and the *Company Service Perspective*) as a part of evaluating how an individual fits into a particular job. By reviewing broad areas of service perspective, behavioral characteristics and basic proficiencies, we expand our ability to discover

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which areas will be most effective in determining job fit for a given position. By attending to each of these three areas, we enhance the opportunity to identify the factors that will lead to the best job fit.

## USING JOB MATCH PATTERNS

The job match process for the **Customer Service Perspective (CSP)** represents an effective approach that minimizes the time required to efficiently describe jobs, people and their degree of match. The descriptive process usually starts by comparing the score pattern of those who are most successful and those least successful within a specific position. The scores on each scale of the **Customer Service Perspective** are reported on a ten-point scale: the higher a score on the scale, the greater the probability of observing the behaviors typically associated with the scale. When the scores of top and bottom performers tend to lie in unique ranges within the scale, we are able to define a pattern for that sample.

The resulting pattern of scores across the various dimensions measured by the **Customer Service Perspective** serves as the initial *Job Match Pattern* upon which the job matching is based.

The **Customer Service Perspective** allows concurrent study of those incumbents available, job requirement assessments by those who know the job or both of these. Even with a small sample, you will have a good place to start the process and an approach that will allow you to further refine the initial pattern with ongoing evaluation. It is important for a business to continually maintain the job relevance of the process by which employees are placed and once developed, any *Job Match Pattern* may be continuously updated as more empirical information becomes available.

Based on this pattern, which reflects what is necessary for success in a position, we can build a *Job Match Pattern* for each factor (each scale on the test). This *Job Match Pattern* consists of a range along each scale in which the scores of the most effective performers tend to fall and which differs as much as possible from the range of scores typical of the least effective performers. Because the characteristics measured tend to vary among most people, the typical pattern will be three to five units wide.

The more outside this range (*Job Match Pattern*) one's score falls, the less likely there will be a good fit of that individual to the job in regard to that particular characteristic, but it takes a consistent pattern of poor fit to result in a poor overall match. In the reports,

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job match is reported as an overall percent match to a specific *Job Match Pattern* for a specific job. This allows for a variation between persons who may still share a good job fit to a position.

## BEHAVIORAL CHARACTERISTICS

### DESCRIPTIVE STATISTICS

The **Customer Service Perspective** has been analyzed with respect to certain requirements that must be met in order for the test to be useful for practical purposes. The first and most basic of these is that the test effectively distinguishes one examinee from another. A test that assigns all examinees the same score is useless. An effective test spreads examinees across the score scale in as even a way as possible.

Two kinds of statistics are helpful in determining whether this is the case. The first type measures the location or central tendency of the score distribution. The mean, the median and the mode are three such statistics. Each measures location of the center of the score distribution, which would ideally be near the center of the allowed range. The second set of statistics indicates the extent to which scores are spread around the center of the distribution and across the score range. The standard deviation, minimum score, maximum score, and standard error all characterize the “shape” of the score distribution, or the ability of the test to distinguish examinees.

The **CSP** scales have distributions of scores that tend toward the high side, as would be expected on a test made specifically to identify traits associated with success in a particular aspect of performance i.e. customer service, but nonetheless, the scale distribution is evenly distributed and identifies a wide range of characteristics in the sample.

### DEVELOPMENT OF THE DISTORTION SCALE

In addition to the eight personality scales, the **CSP** contains a *Distortion* scale. The scale was designed to measure a person’s tendency to create an exaggerated positive impression of one’s self.

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The greater the number of questions that are answered in a certain direction, the greater the concern about how forthright the individual might have been. When this score represents a pattern of answering questions in a manner considered infrequent, it is suggested to the user that the results of the **Customer Service Perspective** should not be used as a part of evaluating that individual. The implication is that a consistent pattern of overly positive self-representation may infer less-than-forthright responses to the other questions in the test that comprise the behavioral scales of the **CSP**. This is noted in the *CSP User's Guide*.

### RELIABILITY ANALYSIS

No measure can be of much value unless it measures traits in a reliable or consistent manner. Reliability refers to the consistency of test items (questions in a scale) as selected by test-takers and also concerns the scores obtained when re-tested with the same assessment on different occasions. Since all types of reliability are concerned with the degree of consistency of test items and their sums as reflected in scores over time, they can all be expressed in terms of a correlation coefficient. A correlation coefficient expresses the degree of relationship between two variables. This relationship is expressed as a decimal number ranging from .00 to 1.00, where 1.00 indicates absolute consistency and .00 indicates the absence of any consistency at all. Although no test is a perfectly reliable instrument, reliability correlation coefficients should be in the .70's, .80's and .90's (U. S. Department of Labor, 1999).

### Coefficient Alpha Reliability Analysis

Coefficient alpha indicates the consistency of responses to individual test questions. The higher a test's coefficient alpha, the more consistent the questions are for that test. A test with a low coefficient alpha could produce different or inconsistent scores each time the same person takes the test. A high coefficient alpha, however, indicates that the test elicits a consistent response rate by the test-takers in the sample studied in a single administration of the test and thus is more likely to derive similar results in future administrations.

Edward J. Inderrieden, Ph.D., Professor in the College of Business Administration at Marquette University in Milwaukee, Wisconsin, agreed to perform a Cronbach Alpha reliability analysis (a model of internal consistency, based on the average inter-item correlation) on the questions contained in each of the eight (8) scales of the **Customer**

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**Service Perspective.** This was accomplished with the results indicating an Alpha of .75 or better for each scale.

## Test-Retest Reliability Analysis

When analyzing the reliability of an assessment, it is often relevant to observe the consistency of test scores as time passes. By administering the test a second time after an appropriate amount of time (typically a few weeks up to about six months) individuals' scores can be compared between each administration. The assumption here is that a consistent set of questions should yield approximately the same scores if taken at a later time. To do this a correlation of scores from one administration to the next is conducted. The higher the correlational coefficient, the more reliable the test's scores are seen to be.

Internal consistency of the **Customer Service Perspective** was determined by calculating test-retest reliability, which determines how consistently scores may be for individuals who take the test again over a period of time, four weeks in this case. This analysis indicates that the eight behavioral scales are reliable and produce consistent results.

## VALIDITY

The software used with the **CSP** allows the user to establish individualized and appropriate standards for establishing the level of performance for their employees. Once selected by the company, these top performers become the model (criterion) for the company's individualized use with the **CSP**. The criterion, or performance rating, is a measure that is essential in validity studies.

## Validity and the Customer Service Perspective

Validity measures the extent to which an assessment evaluates what it is supposed to evaluate; in other words, the effectiveness of an assessment to predict important factors like performance. The concept of validity refers to the appropriateness or accuracy of inferences or decisions made about individuals based on test results. It is important from both a business and legal perspective that organizations answer the question regarding the validity of the inference underlying selection testing. If the inference is not valid, organizations may waste their business investment in selection tests and risk challenges to their hiring and placement decisions.

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## The Criterion-Related Validity Approach

Criterion-related validity is one of the most accepted means of demonstrating test validity for all types of tests. In a criterion-related validation study, scores on a test may be correlated with job performance scores for the same group of applicants or employees (the criterion). The relationship between test scores and job performance scores reflects the criterion-related validity of the test. The stronger the relationship, the more confidence one may have that the test is working as intended to select better applicants based on a performance index.

## Job Match Criterion-Related Validity Study

This section of the *CSP Executive Summary* reviews the relationship between the **CSP Overall Job Match Percentage (JMP)** and a performance criterion. This criterion was based on an executive committee evaluation of each member of our study sample. Approximately sixty-eight employees were administered the **Customer Service Perspective**. Those who completed the assessment were rated by the executive committee. Ratings include “top,” “middle,” and “bottom” performance groups. The sample included sixty-three members of a sales and service company with clients nationwide.

If the **CSP** predicts what is vital to identifying top performers, then the relationship between rankings and *JMPs* should be high. In other words, correlations should appear quite high between these two factors if the *JMP* accurately selects top performers as set by the criterion.

Our statistical analysis revealed an exceptionally high relationship between the predictor variable (the *JMP* produced from **CSP** pattern development) and the criterion (performance rating). This establishes the validity of the matching process and the predictive strength of the **CSP**.

While we are discussing criterion-related validity, this study is a good example of how the Job Match process is so much more effective than a straight linear way of thinking about scale scores and predictive validity. If an assessment were utilized in which scale scores alone were determinate for predicting success, one may find (and often does) that traditional thinking about test scores falls short.

Higher is not necessarily better in the case of test scores. As evidence to this statement, we can observe the score distribution of the sample based on the groups identified by performance ratings. In most cases, we have found that high scores do not neatly

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equate to high performance ratings. Rather, there is a range of scores that are common to the high performance group that lies somewhere along the ten-point scale sometimes below the highest range of possible scores. This is, of course, dependent on the specific sample of an organization.

When the score distribution of the top performers differs from that of the bottom performers, we can then determine predicted success. This is what the *JMP* measures. It is a percentage score that evaluates the scores of an individual in comparison to the range of scores common to top performers. Since the top performers score distribution is not necessarily in the high score range of the scale, attaining a high score may have a detrimental effect on one's *JMP*. This illustrates how higher is not necessarily better in the case of predicting success. This is a direct result of the fact that the *JMP* is *not* based simply upon high score attainment, but on the range of scores typical of the top performing group based on a company's specific criteria.

It is often the case that top performers' scale scores will not relate to a linear, "higher is better" way of thinking. If that were the case, correlations would reflect the situation of high scale scores equaling higher *JMPs*. That's the "magic" of pattern-building: taking into account that top performers do not necessarily follow the erroneous, conventionally-accepted tendency to score highly on test scales.

### Scale Scores Criterion-Related Validity Study

A major validation study conducted by Dr. David Pearson utilized data from a study with MCI corporation. It was very clear that the 8 factors or *Behavioral Characteristics*, did indeed *predict* and identify those who would succeed as *top performers* and those whose scores revealed weaknesses which resulted in their being classified as poor or low performers. Details of this study may be found in the *CSP Technical Manual*.

Thus, it is concluded that the 8 factors or traits being utilized by the **Customer Service Perspective** are valid predictors when considering customer service-oriented employees who will most likely succeed.

### Gender Issues: Disparate Impact

The eight **Customer Service Perspective** *Behavior Characteristics* scales were a part of a study conducted with 300 MCI employees. The composition of this group was approximately 19% female and 81% male. For each of these scales, no significant differences in the results were found in regard to the gender of the participants.

## PROFICIENCIES

### OVERVIEW OF THE PROFICIENCIES SECTION

There is an ever increasing need for a quick, easy-to-administer, internally accurate instrument that will provide a reliable indicator of one's ability to recognize and properly use words considered to be commonly used in most of today's work environments.

#### Independent Review

In order to acquire additional expert opinion concerning the *Vocabulary* section of the **CSP** during its initial development, Dr. Pearson sought the independent review of Luther B. Clegg, Professor and Chair, Department of Curriculum and Instruction at Texas Christian University. His observations support the utility of the *Vocabulary* section of the **CSP** and confirm, via independent review, the fairness of this test. See Appendix A for a copy of this letter.

### DESCRIPTIVE STATISTICS

One hundred and twenty-two currently employed customer service representatives and related professionals were administered the **Customer Service Perspective Proficiencies** section. These scores have been analyzed with respect to certain requirements that must be met in order for the test to be useful for practical purposes. An effective test's sample of scores distributes examinees across the score scale in as even a way as possible, based on statistics like the mean and standard deviation, to name a few. In our studies, the distribution of scores demonstrated a distribution that reflects a tendency for the average person to successfully complete most, but not all of the questions in each section. This reveals the information needed to determine if an individual test taker possesses scores below, within or above what is typical for most individuals expected to utilize the **CSP**.

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## RELIABILITY ANALYSIS

As mentioned previously in regard to the **CSP Behavioral Characteristics**, reliability refers to the consistency of test items as selected by test-takers as well as the scores obtained when re-tested with the same assessment on different occasions and this principle holds equal importance in reference to the *Proficiencies* section of the **CSP** as well.

### Coefficient Alpha Reliability Analysis

Coefficient alpha indicates the consistency of responses to individual test questions. The higher a test's coefficient alpha, the more consistent the questions are for that test.

Internal consistency of the *Proficiencies (Vocabulary and Numerical)* was determined by calculating coefficient alpha reliability. Our analysis indicates that the *Proficiency* scales are reliable and produce consistent results.

### Test-Retest Reliability Analysis

Internal consistency of the *Proficiencies* section was also determined by calculating test-retest reliability, which determines how consistently scores may be for individuals who take the test again over a period of time, four weeks in this case. Our analysis indicates that the two *Proficiencies* scales are reliable and produce consistent results, as demonstrated by high correlational coefficients.

## VALIDITY

Validity is the extent to which an assessment measures what it is supposed to evaluate. Most of the validation studies for the *Proficiencies* section of the **CSP** were conducted concurrently with the *Behavioral Characteristics* section and these results may be found on pages 9-11 of this *Executive Summary*.

# THE COMPANY SERVICE PERSPECTIVE

In developing the **CSP**, our team of developers' experience with customer service testing made evident the need for a customer service knowledge test that adapts to the needs of each individual company that utilizes it. If every team of customer service professionals felt the same way about every customer service issue, a single answer key for the **CSP** would be sufficient. We have discovered that, while some concepts are somewhat universal among professionals, other issues are quite debatable, and often reflect the individual style or perspective of an individual company. This is usually related to the company's vision and mission for their products and services, and should definitely be tailored to fit the needs of that vision.

This sounds simple and logical, except that modern testing practices tend to emphasize pre-set keys and norming tables in order for computerized algorithms to process scores. Therefore, thinking outside the technologically limited box was mandatory, with a novel process for score tabulation being the result. Instead of gathering individual item responses and comparing them with a static key of "correct" answers, the data can be accumulated and compared with a unique "key" or response pattern developed for each individual company that uses the instrument. Therefore, we are able to process a score that represents the alignment of responses between the test-taker and the company. This score signifies a conceptual fitness for the perspective held by the company concerning customer service issues. Thus, we have the utility of a matching instrument with the individuality of a corporate culture analysis: the *Company Service Perspective* section of the **CSP**. The emphasis here is on the *company* as opposed to a static and likely irrelevant scoring key.

Because of the unique nature of the scoring for the *Company Service Perspective*, it is not included with the overall percent match, but instead is used as a means by which a hiring manager or other corporate professional may make decisions concerning training needs, selection appropriateness and performance expectations. Statistical analysis is also a different matter for this section of the **CSP** as no norms are generated before the utilization of the product. What is measured is how similar a test-taker's responses are to that agreed upon by the company. Since this score does not contribute the overall match percentage, reliabilities are not needed. However, for the sake of interest, we will be gathering data on the response patterns of test-takers, simply to learn how questions tend to be answered by the average person. Such information will not, however, serve any statistical purpose beyond satisfying our development team's curiosity.

## Summary and Conclusions

With regard to the internal validity of the **Customer Service Perspective (CSP)**, an analysis of the relationships among the personality scales indicated a pattern of converging and diverging relationships that are clearly consistent with expectations based on the constructs being measured. The statistics clearly demonstrate:

- ◆ positive correlations between related scales
- ◆ a negative correlation between two opposite scales
- ◆ insignificant correlations between unrelated scales

Overall, results of our analyses of validity consistently indicate that the **CSP** is a valid measure of what it was designed and intended to measure, namely eight core dimensions of customer service performance behavior, two work related *Proficiencies: Numerical and Vocabulary*.

This manual summarized the results of several validation projects that examined the relationship between the **Customer Service Perspective** scales and a diverse range of criteria. The results of these projects provided consistent and substantial support for the predictive validity of the **CSP**. Ratios of selection utilizing **CSP** overall match percentages when compared to measures of successful service performance were consistently accurate. These studies support the criterion validity of the **CSP** when job performance is the standard.

The reliability of the **CSP** scales has been established through a variety of analyses, all of which demonstrate the consistency the each of the eight *Behavioral Characteristics* scales and the two *Proficiencies* scales.

In conclusion, statistical analysis of the **Customer Service Perspective** clearly indicates that its scales provide an accurate and reliable measurement of eight core customer service related *Behavioral Characteristics* and two primary work-related *Proficiencies*. In addition, the *Company Service Perspective* (identifying alignment with your organizational culture) has been constructed to predict a number of important training-related issues and may act as a reliable guide for employee development.

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## APPENDIX A: Independent Review



May 30, 2000

To Dr. David W. Pearson:

It has given me great pleasure to review the questions and logic employed by you in the development of the Word Recognition testing instrument. I believe the program will provide all employers with an excellent tool for determining the verbal skills of job candidates and current employees.

The programs are cleverly designed with a sensible selection of "easy" words to allow even a less-educated person to feel a degree of success. At the same time, sufficient words fall into a moderate to difficult range. Overall, a very adequate basis is provided for employers to make appropriate selections based on word knowledge.

Throughout, the word meanings are abundantly clear and the correct answers distinct from the alternates without any unnecessary confusion or ambiguity. This holds equally true where the questions relate to use of correct synonyms or antonyms.

The usage of the words examined is all in current employ and the correct meaning is clear in every case. I found no bias or attempt to unfairly screen in any stage of the program.

As someone who regularly examines and employs contemporary testing related to literary education and word knowledge, I was delighted to find your Word Recognition testing instrument to be such a competent, thorough and fair evaluation tool.

Sincerely,  
  
Luther B. Clegg  
Professor & Chair  
Department of Curriculum and Instruction  
Texas Christian University

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## APPENDIX B: Customer Service Perspective Scale Descriptions

TABLE 2.2 – CSP Behavioral Characteristics Scales		
Low Scores	Scale Descriptions	High Scores
<p>Wary</p> <p>Vigilant</p> <p>Skeptical</p>	<p><b>Trust</b> – Tendency to hold an unquestioning belief that the motives of others are honorable.</p>	<p>Unquestioning</p> <p>Uncritical</p> <p>Optimistic</p>
<p>Direct</p> <p>Obvious</p> <p>Forthright</p>	<p><b>Tact</b> – Tendency to state a position without offending others.</p>	<p>Discreet</p> <p>Diplomatic</p> <p>Restrained</p>
<p>Detached</p> <p>Indifferent</p> <p>Distant</p>	<p><b>Empathy</b> – Tendency to understand another’s situation and feelings.</p>	<p>Understanding</p> <p>Compassionate</p> <p>Sensitive</p>
<p>Imprecise</p> <p>Casual attitude</p> <p>Lackadaisical</p>	<p><b>Conscientiousness</b> – Tendency to be very accurate in work efforts; to keep promises.</p>	<p>Meticulous</p> <p>Particular</p> <p>Accountable</p>

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<b>TABLE 2.2 – CSP Behavioral Characteristics Scales</b>		
<b>Low Scores</b>	<b>Scale Descriptions</b>	<b>High Scores</b>
<p>Inventive</p> <p>Free Spirited</p> <p>Independent</p>	<p><b>Conformity</b> – Tendency to comply with the rules and those in authority.</p>	<p>Respects Authority</p> <p>Comfortable With Procedures</p> <p>Conventional</p>
<p>Distractible</p> <p>Preoccupied</p> <p>Inefficient</p>	<p><b>Focus</b> – Tendency to pursue an objective regardless of distractions.</p>	<p>Attentive</p> <p>Purposeful</p> <p>Efficient</p>
<p>Forward</p> <p>Brash</p> <p>Impolite</p>	<p><b>Courtesy</b> – Tendency to deal with others in a pleasant manner.</p>	<p>Polite</p> <p>Civil</p> <p>Well-Mannered</p>
<p>Uncompromising</p> <p>Inflexible</p> <p>Cautious</p>	<p><b>Flexibility</b> – Tendency to explore new approaches to doing things; open to change.</p>	<p>Adaptable</p> <p>Accepting</p> <p>Enjoys New Approaches</p>