



# Assessing Customer Focus in a Financial Institution





# 1. Introduction to ethoz

- Wholly owned by Adcorp Holdings
- Specialist HR consultancy established 1999
- Core services include:
  - Position profiling
  - Assessment
  - Career Development / Guidance
  - Human Capital consulting

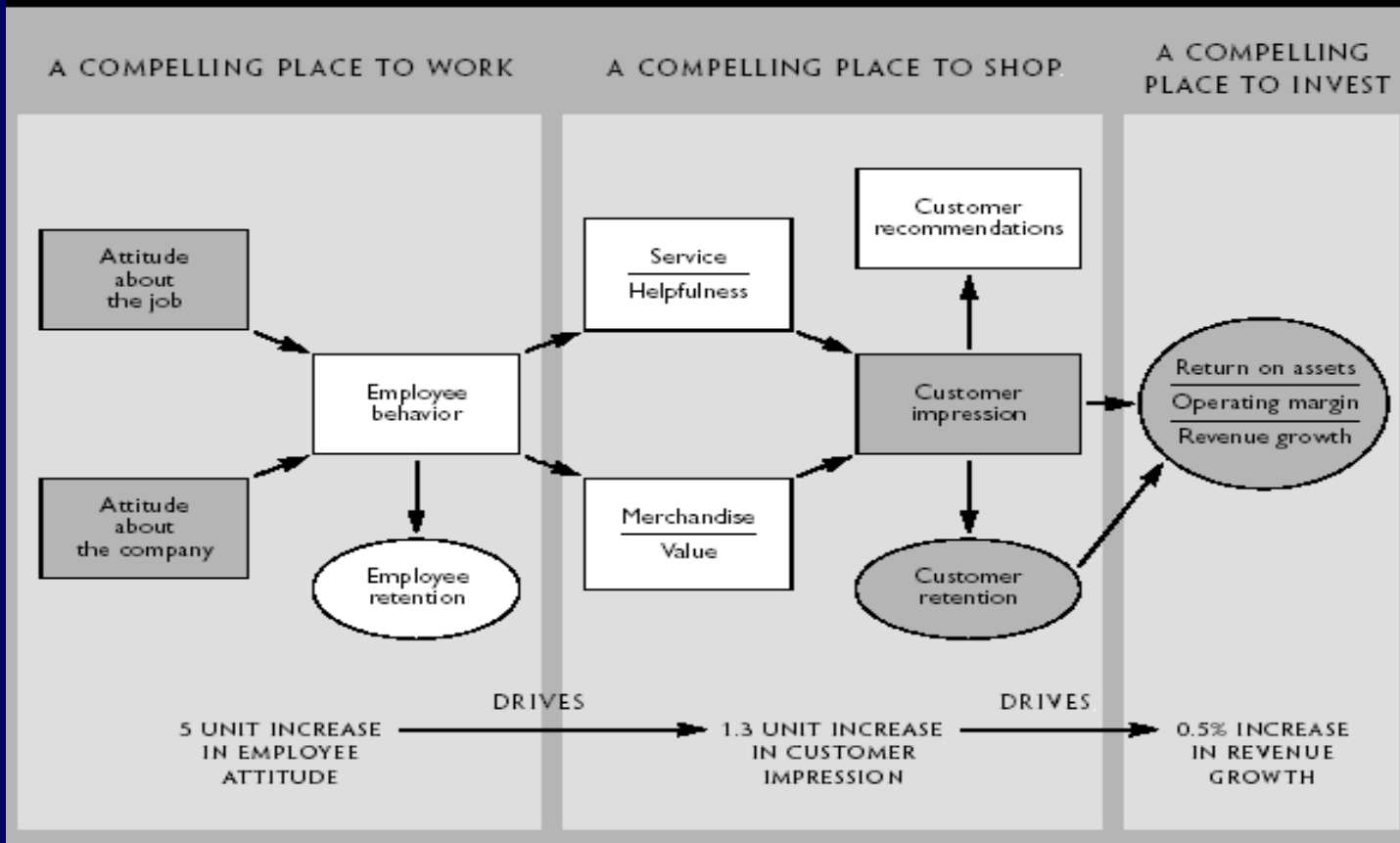


## 2. Project Background


- Sustainable competitive differentiation and advantage in creating customer delight
- Front-line customer service role
- Research and benchmark determinants of good customer service
- Develop an ideal profile for front-line customer service position and assess current staff against profile
- Communicate the change in role – higher level expectations

## THE REVISED MODEL: THE EMPLOYEE-CUSTOMER-PROFIT CHAIN.

This is the model we use today. The rectangles represent survey information, the ovals, hard data. The measurements in gray are those we collect and distribute in the form of the Sears Total Performance Indicators.



Source: Reprinted from Rucci, Kim, & Quinn. Harvard Business Review (1998)



### 3. What determines good customer service?

- International best practice research
- Customer Centricity
  - Reliability
  - Responsiveness
  - Empathy
  - Assurance



## 4. Ideal profile

- Position profiling workshop (18 contributors)

**Strategic Purpose**

### **15 Inherent Competencies**

Thinking & Problem Solving (3)  
Personality & Coping (3)  
Interactive (6)  
Work (3)

### **Functional Competencies**

Knowledge (7)  
Skill (21)

### **Motivational Drivers**

Role  
Performance  
Relationships

### **Outputs**

Balance Scorecard



## 4. Position Profile cont.

- Thinking and Problem Solving Competencies
  - Integrating
  - Insight
  - Environmental Sensitivity / Responsiveness
- Personality and Coping Competencies
  - Adaptability
  - Independence / Competent Confidence
  - Resilience



## 4. Position Profile cont.

- Interactive Competencies
  - Empathy
  - Oral Communication / Listening
  - Interpersonal Sensitivity
  - Impact
  - Rapport Building
  - Conflict Resolution
- Work Style Competencies
  - Motivating People
  - Customer Focus
  - Enthusiasm



## 5. Design of Process

- Briefing to individuals pre-assessment centre
- 1 day assessment centre
  - Group discussion
  - Role-play
  - OPQ 32i
  - FIRO-B
  - Structured Interview
  - Functional competency questionnaire
- Face-to-face feedback to individual and manager
- Reports to Management and shortened version to individual
- Individual Development Plan session 1 week after feedback



# Prototype and Pilot phase

- Prototype

- 23 Individuals
- Randomly selected in Gauteng
- Review of results with client

- Pilot

- 61 Individuals
- Launched in Gauteng North and South
- After review, decision to launch nationally



# Resources and Logistics

- National project
  - All 9 provinces covered
- Assessed 292 individuals in total
  - 208 seen within 5 months
- Project team – divided into 2 teams
  - 9 professionals
  - 3 administrators
- Multiple locations simultaneously



# Reporting and Feedback

- Reports
  - 15-page report to line manager
  - Condensed 5-page report to individual
  - Overall summary report for each province
- Face-to-face feedback
  - 2-hour session with individual and line manager
  - Designed to raise self-insight and awareness of own strengths and development areas
  - Participative style
- Individual development plan session
  - Follows approximately 1 week after feedback
  - Managed and owned by individual



# Findings

- Cultural sensitivity was an issue amongst 90 % of candidates
- Development areas:
  - Problem solving ability
  - Confidence – impacting on ability to influence and take charge
  - “Environmental Responsiveness” – pro-active behaviour
  - Accepting ownership – referred to branch manager
  - Adaptability to change
  - No experience of having to solve problems independently due to old culture
  - Conflict Resolution – no strategies apart from appeasing
    - More than half scored on a basic or limited level
  - Motivating People



# Findings

- Strengths
  - Oral Communication
  - Interpersonal Sensitivity
- Individuals overall do not seem ready for the new role
- Majority did not meet requirements – especially long-serving staff
- New staff performed better – lacked in-depth bank knowledge
- 13 % - a strong match
- 21 % - potential to match
- 52 % - limited potential
- 14 % - no suitability



# Learning points

- Internal project manager works best
- Communication of purpose of process is vital to success and the participation of individuals
- Importance of change management
- Involvement of relevant stakeholders – regions with higher level of involvement from HR and line managers meant a smoother process
- Promise of “no penalty” to lower performing candidates a mistake – project emphasised that it is for own development



# Questions