



User Manual

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TABLE OF CONTENTS

1	Introduction	1
2	When To Use The <i>CSI</i>	2
	2.1. Selection	2
	2.2. Development	2
	2.3. Caution: Using the <i>CSI</i> Wisely	2
	2.4. Legal and Professional Considerations	3
3	Scale Definitions	
	3.1. Customer Focus	
	3.2. Productivity	
	3.3. Customer Confidence	
	3.4. Customer Service Potential	
	3.5. Impression Management	
4	Using The <i>CSI</i>	
	4.1. Fairness	
	4.2. Administration	
	4.3. Results and Reports (including norms)	
	4.4. Feedback	
	4.5. Cross Cultural Considerations	
5	Technical Matters	
	5.1. Test Design	
	5.2. Reliability	
	5.3. Validity	
6	What Do You Think?	

Appendix: Current Norms (Comparison groups)

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INTRODUCTION

The Customer Service Inventory (CSI) is designed to assess the key personal qualities of applicants for service intensive roles.

Customer service roles are varied. They can range from relatively standardised, process driven customer interactions in contact centres through to more complex face-to-face relationships. Irrespective of the role, however, certain attributes appear to differentiate high and low performers. For example, one of the most immediate requirements is the ability to restrain hostility or irritation when dealing with demanding customers. More subtly, service roles can involve the ability to pick up on customer feelings which might be unstated but which need to be understood for the encounter to be successful.

Customer service environments are often fast paced. They can involve the requirement to spread one's attention across competing demands. As a consequence, a degree of stamina and enthusiasm is also valuable in such roles. Many customer service jobs involve following a process or series of processes – and failure to do so can have serious legal and reputational consequences. So an element of compliance and rule-following can also be important.

The *CSI* was developed in partnership with leading service organizations including a major insurance provider and a utility company. It is built upon rigorous analysis of the actual behaviours that distinguish the best performers. In choosing to use the *CSI*, you are deploying a tool that will add considerable value to your selection and assessment activities.

WHEN TO USE THE *CSI*

2.1. Selection

The decision to hire someone has great significance for both the organization and individual. This is particularly the case for customer service roles. Here employees are often the first, perhaps even the only contact the customer has with the organization. So how he or she is treated has particular significance. Whether the encounter leaves the customer satisfied and happy, or irritated and unlikely to recommend the business, will be determined in part by the qualities assessed by the *CSI*.

The *CSI* has been designed to be used as either a screening tool or a selection aid alongside the interview. Where very high volumes of applicants have to be managed, the *CSI* provides a robust, inexpensive and effective way of identifying the most suitable applicants for interview. Alternatively, the *CSI* can be used to deepen the interview experience with candidates. This is because it provides interviewers both with a short narrative report and helpful probe questions.

2.2. Development

When used discerningly, a *CSI* report can form an excellent basis for a discussion about an individual's strengths and development needs. The test can play a useful role in training courses, coaching, mentoring and other learning interventions. It can also be used in career counselling sessions, for example, to give participants insight into the likely challenges and rewards of a customer service role.

2.3. Caution: Using the *CSI* Wisely

Tests should only form part of an overall selection decision. It is important to take into consideration other factors such as previous work history, academic or vocational qualifications, and information from other sources such as interviews and references.

When a tough decision has to be made, especially one that impacts negatively on others in the workplace, it can be tempting to look for a tool or a process to make this decision for you. In these circumstances, psychometrics are a poor substitute for an open, honest conversation as part of a broader performance management dialogue. To be clear, psychometrics such as *CSI* can play an important part in helping to

identify who, for example, is most equipped to make the transformation to a new role or a new way of working. Wherever possible, however, it should be used alongside other relevant sources of data about the person to help reach a balanced, fair conclusion.

2.4. Legal and Professional Considerations

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