

Client Name: Omnia Report Samples  
 Client Number: 20-SAMPLES  
 Participant Name: Chris Sample  
 Personality Group: The Visionary  
 Report Type: Onsite  
 Profile Number: 1475156WB  
 Report Date: June 6, 2021  
 Dept./Div.:

**Your Customer Service Style: VISIONARY**

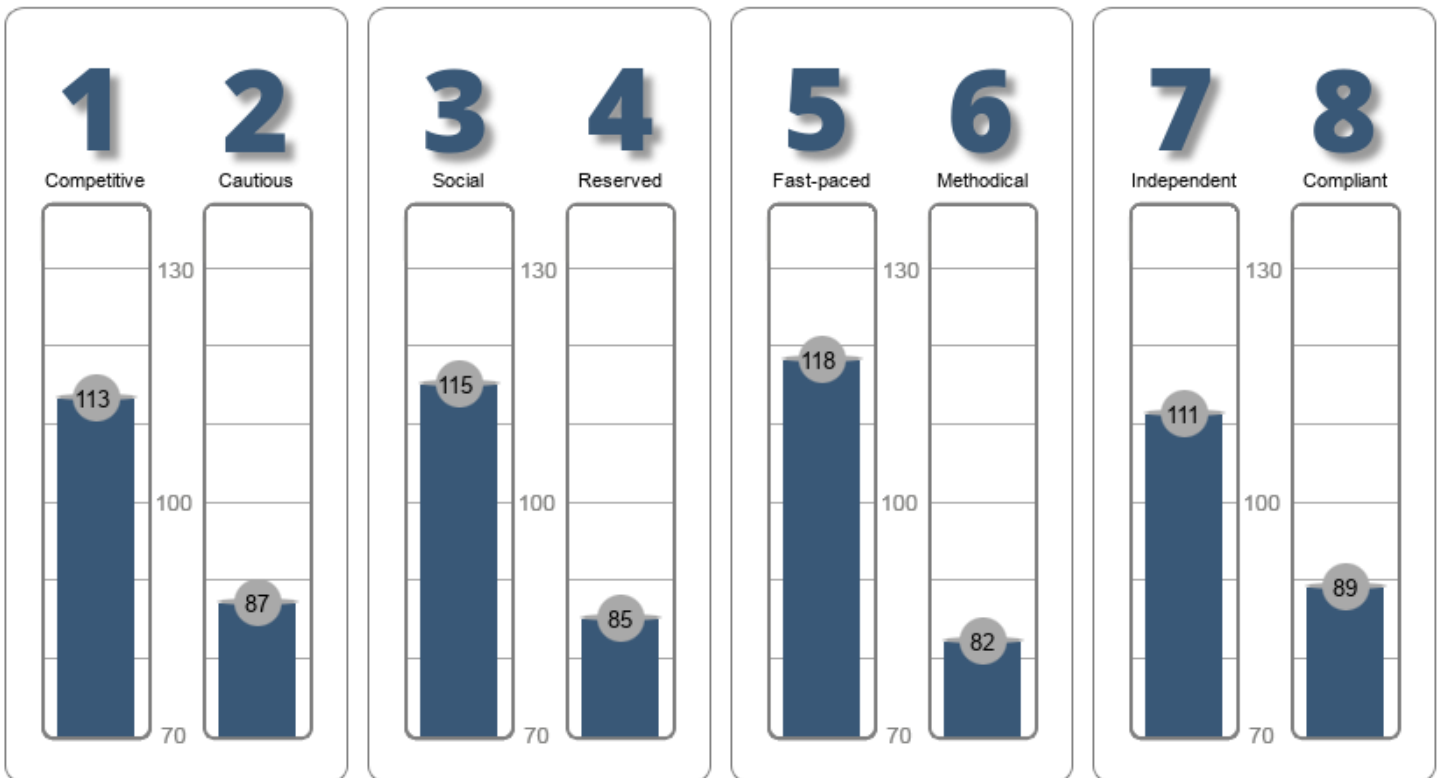
You are assertive, outgoing, fast-paced and decisive. You have a bold, confident service style. Strengths include drive, resilience and engaging customers.

## Assertiveness

## Sociability

## Pace

## Structure



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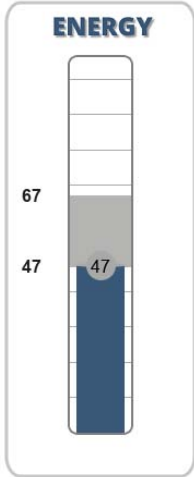
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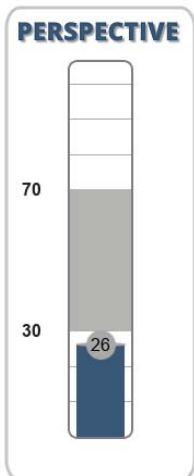
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## CUSTOMER SERVICE STYLE



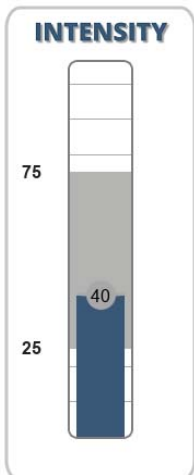
You selected an average number of words on the assessment.

Your Energy score suggests an ability to efficiently process information along with adequate stamina for a typical workweek.



A Perspective score below the average range can reflect stress or discomfort with your responses on the assessment.

Under pressure, you may not always assess the consequences of decisions. A low Perspective score can also reflect understandable concern over taking the assessment as an existing employee.



Intensity measures the strength of your personality traits.

A score within the average range indicates you have clearly defined traits and good focus. It should be comfortable for you to articulate your motivators and workplace needs.

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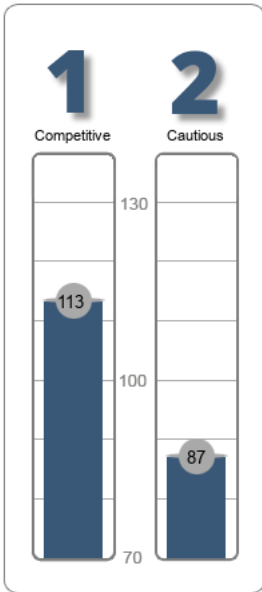
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## CUSTOMER SERVICE STYLE



You have a **Visionary Service Style**, indicating you are **assertive, creative, persuasive, time sensitive, and resilient**.

Columns 1 and 2 measure assertiveness. Your column 1 is taller than your column 2; this means you are **goal driven, competitive, ambitious, and take charge**.

The taller your column 1, the more pronounced these characteristics are. You confidently take initiative to respond to customer questions and address issues. You want to make a strong individual impact and prove yourself through impressive job performance.

You like pursuing new challenges, especially when you can earn rewards for your efforts. You have a high level of assertiveness, and this gives you the confidence to suggest additional products and services to existing customers in order to obtain additional business.

You are mainly focused on achieving individual objectives, while customer service roles often require a collaborative effort from all of the CSRs to accomplish department goals. Remember to work with your colleagues on shared endeavors instead of viewing them as competition.

Your comfort with attending to difficult or contentious matters makes you well suited for resolving customer complaints in a proactive manner. You're not afraid to deal with pushback from customers or negative commentary. However, ensure you do not come across too aggressively, even when you must stand firm.

You keep things moving forward and seek rapid results. You demonstrate strong determination and resolve for overcoming obstacles and negotiating for favorable outcomes.

If your column 1 is very tall, you could be forceful in your service style, which may not resonate with some customers. Step back occasionally to make sure you are not being pushy or intimidating.

Understand when to tone down your approach, and remember the importance of working with your fellow customer service representatives to garner positive results for the team/department.

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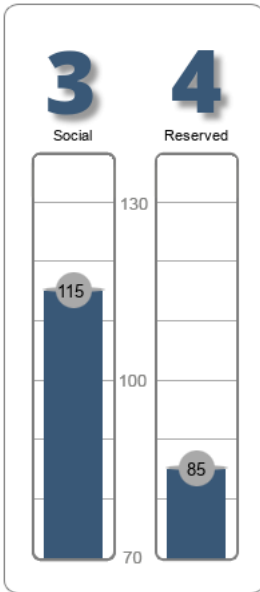
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## CUSTOMER SERVICE STYLE



Columns 3 and 4 measure communication and problem-solving style. Your column 3 is taller than or equal to your column 4, which indicates you are **people oriented, creative, socially expressive, intuitive, and outgoing**.

You enjoy interacting with people and are quick to build and maintain relationships with customers and colleagues. You can also leverage conversational dynamics to get customers interested in additional products and services. You naturally generate enthusiasm for your recommendations.

You can be a gregarious communicator who is motivated by working with others for much of your day. This is helpful in service roles where contacting customers and assisting them with transactions or problems is an integral part of the workday.

You have potential to talk more than listen and, consequently, might not always hear customers' unique requirements or specific issues. Consider taking notes as customers are talking so you can review and clarify the important points.

Work on evaluating customer needs by asking pertinent questions and listening carefully during conversations. Educate yourself well on your company's offerings so you can provide customers with targeted solutions and recommendations rather than generalized suggestions.

**Note:** If your column 3 is taller than column 1, you may focus on maintaining strong rapport rather than boldly suggestive selling additional products/services. You do not like to come across as imposing and jeopardize the positive customer relationships you worked to establish. If revenue generate is a part of your particular service role, try role playing various sales situations to increase your confidence, and listen in on other successful customer service representatives for tips.

If your columns 3 and 4 are equal or nearly equal, you balance sociability with succinctness. You can cultivate professional rapport while keeping conversations focused on the business at hand. You use a combination of intuition and logic to assess customers' needs. You take both relevant data and customers' concerns into account when developing solutions to problems.

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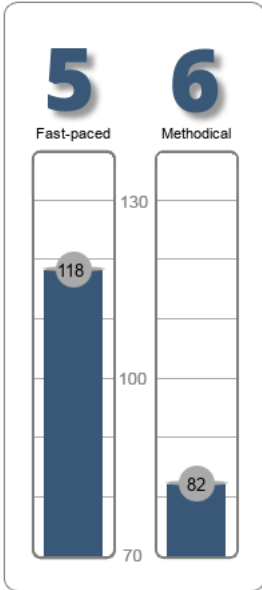
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## CUSTOMER SERVICE STYLE



Columns 5 and 6 measure pace. Your column 5 is significantly taller than your column 6, which means you are **time sensitive, multitasking, flexible, and adaptable to changes.**

You work at a fast pace and favor having diversity within your responsibilities; too much predictability can leave you feeling bored or frustrated. Working in a dynamic environment with chances to shift gears throughout the day motivates you.

Customer service positions are often fast moving and require the ability to juggle several activities at one time - something that comes naturally to you. You can also handle a high volume of customer calls and react to important matters with a sense of urgency.

You are inspired by feeling an frequent sense of accomplishment, so achieving results rapidly is your preference. You favor working toward short-term objectives and may need to divide lengthy projects into small segments so you can visualize your progress.

Remember to exercise patience with customers who need extra time and attention or have complex issues to resolve. Do not rush through customer calls, and use organizational tools to remind you when to follow up on outstanding tasks.

Your outgoing communication style combined with your fast tempo could cause you to talk too quickly or hurry through customer interactions. Therefore, speak clearly, and ensure your customer fully understands your suggestions or explanations by giving them the opportunity to ask questions.

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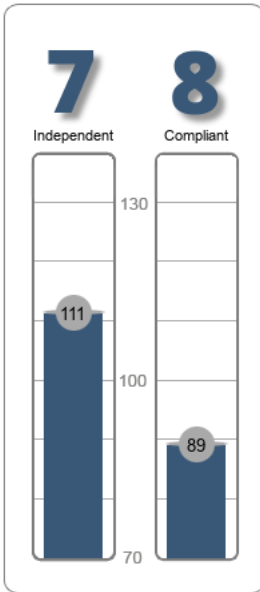
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## CUSTOMER SERVICE STYLE



Columns 7 and 8 measure one's need for structure. Your column 7 is taller than or equal to your column 8, and this indicates you are **independent, decisive, big-picture, and self-sufficient**. You have a low need for structure.

You are autonomous and self-directed, someone who favors having ample freedom to determine for yourself how to accomplish your duties. You focus on end results more than the details or processes taken to achieve those results.

You want to innovate and try different methods rather than follow a large number of strict procedures. You want to have some latitude to make your own decisions.

You are comfortable with taking "trial and error" approaches rather than needing to achieve precise results the first time, every time.

You can think quickly on your feet and improvise when necessary. You are willing to proceed in ambiguous situations, which can be beneficial if your manager is not readily available or if your position does not have well-defined service protocols.

If you work in a job that requires strict compliance to service procedures, be sure to understand the parameters within which you must operate.

Discuss mandatory processes with your manager as well as where you can try new strategies to make sure everyone is on the same page.

You can quickly rebound from setbacks and criticism, which can be helpful when required to perform inside sales in a service role. You do not allow turndowns to shake your confidence, which propels you easily to the next opportunity. You are also willing to try again when you hear a No, understanding that perhaps the timing just wasn't right.

A possible downside to your independence is low attention to detail. Be sure to set aside time to handle data entry, documentation, order verification, correspondence, and other service tasks, so you can concentrate fully. Also, review your work closely for errors. Confirm your results are consistently accurate and thorough.

**Note:** If your columns 7 and 8 are equal, you combine a big-picture focus with an equal measure of attention to important details for completing daily service and administrative tasks.

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## CANDIDATE'S KEY TRAITS

This summary is based on the highest of the 8 columns. This page is **ideal for use with employee coaching**.

You are naturally goal-oriented, proactive, and competitive. You are comfortable showing initiative in difficult situations and inclined to seek out new opportunities and meet ambitious goals. You are comfortable dealing with a relatively high degree of conflict, adversity, or risk when pursuing goals. You are motivated by individual performance-based pay such as commission. You are also motivated by advancement potential and new challenges. You are more authoritative and demanding than supportive.

You are an outgoing, upbeat individual. You have a strong need to interact with people and may have to make an effort to focus on tasks requiring solitary concentration. You have an enthusiastic communication style; you tend to use emotion and personal connection, rather than detailed or technical information, when trying to persuade. You rely mostly on instincts when evaluating situations/devising strategies. You are a good networker, promoter, and motivator, and potentially a better speaker than listener. You appreciate public recognition.

You are fast-paced and potentially impatient. You fit well in a time-driven environment where deadlines might be given or altered with short notice. You are comfortable multi-tasking and adapting to new situations, priorities, or schedules. You may have to make an effort to finish tasks before starting another; there is potential for overextension. You are a naturally flexible individual who could quickly become frustrated with routine, repetitive tasks.

You are an independent decision-maker who follows important rules but prefers general guidelines to formal, explicit procedures. You are a confident self-manager; you want to know what needs to be done rather than how to do it. You are comfortable making decisions with a basic understanding of expected outcomes. You deal well with criticism. You are not naturally attentive to details, so you may have to make an effort to maintain high accuracy levels with tasks like reporting and documentation.

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## DEVELOPMENT INSIGHT

### COMMUNICATION STYLE

- You are a gregarious communicator who can establish connections with people easily. Building rapport with customers and coworkers should come naturally to you. You are apt to smooth over difficult interactions with diplomacy and empathy. You answer customers' questions in an upbeat manner and can use compelling language when speaking about additional products and services that customers may want to add.
- When you interact with skeptical or very serious customers, you will need to take a more consultative, concise approach. Provide specific information and proof of your assertions rather than generalizations or an overview. Limit small talk that can seem insincere to such individuals, and provide specific solutions to issues and concerns.
- If your columns 3 and 4 are fairly equal, you are both genial and business focused. You can modify your communication style depending on your audience, using emotionally oriented appeals, data and evidence, or a combination of both. You build professional rapport and speak with sincerity as well as enthusiasm.

### STRENGTHS

- Proactively contacting customers; showing initiative; handling irate callers or addressing potentially contentious situations/issues; managing inside sales responsibilities if applicable; recognizing revenue-generating opportunities; focusing on goal achievement; working under a quota system and/or bonus incentive pay structure.
- Establishing rapport with customers and building a personal connection; making sales suggestions through conversational dynamics; networking; establishing contacts and key relationships; speaking persuasively; maintaining communication with customers, management, and other work associates; solving problems in creative, intuitive ways.
- Working under tight deadlines; quickly adapting to the unexpected; multitasking; dealing with interruptions; trying new things; approaching tasks with a strong sense of urgency; confidently changing service processes to best fit the situation; rapidly adjusting to shifting priorities; managing competing time demands.
- Resilience for brushing off criticism and/or rejection; self-managing; seeing the big picture; thinking outside of the box and using your own judgment; meeting challenges with resourcefulness; knowing what results are most important, and focusing your energy on achieving them.



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## DEVELOPMENT INSIGHT

### CHALLENGES

- Working contentedly in a supportive role; keeping a team-oriented perspective when approaching tasks; collaborating with coworkers; working toward shared objectives; toning down your forcefulness when appropriate.
- Assessing a customer's needs through questioning and active-listening techniques; concentrating on solitary service tasks like entering data, processing orders, and completing documentation.
- Patience when interacting with customers, especially those who need significant time and attention; following up with customers or on outstanding assignments. You could have a tendency to take on too much at one time and overextend yourself, resulting in disorganization.
- Accuracy, attention to detail, and strong awareness of company guidelines and best practices. You could tend to handle service situations your way rather than closely following established processes.

### PACE

- You are fast paced and multitasking, and you have a natural sense of urgency. You achieve results quickly but can put an unrealistic burden on yourself for immediate results. You are likely to expedite service processes whenever feasible, and you may find short-term goals motivating. You enjoy variety and can jump from task to task easily.
- You favor working in a dynamic, time-driven environment. You have the versatility to coordinate a full schedule of customer calls or service tasks. You are also comfortable handling frequent interruptions and unexpected changes to your plans. When a given service process is not working, you are swift to make adjustments without becoming flustered.

### ATTENTION TO DETAIL

- You have an affinity for seeing the big picture more than the details involved. You may not have meticulous work habits, and you could feel frustrated by detail-intensive responsibilities such as ensuring customer account information is correct or up to date.
- Be sure to allocate the necessary attention to entering data, processing documentation, and reviewing service reports; look over your work for accuracy.
- If your columns 7 and 8 are equal, you remain big-picture focused but with more natural attention to detail for completing the daily administrative tasks involved in customer service work.

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## DEVELOPMENT INSIGHT

### MOTIVATIONAL STRATEGIES

- Performance-based incentives (commissions, bonuses, contests); opportunities to advance; taking charge or tackling new challenges; leadership opportunities. Earning rewards based on individual accomplishments.
- Sharing ideas and building relationships. Public praise for achievements. Interaction with people; special recognition and awards; a fun workplace.
- A dynamic work environment; a frequent sense of accomplishment through short-term goals; task variety.
- Freedom to define your goals and achieve them in your own way; having input into decisions and action plans that directly impact your job; flexible guidelines that can evolve over time; focusing on results rather than day-to-day details.

### DEMOTIVATORS

- No opportunities for advancement or to increase your earnings through individual effort. Not feeling challenged by your work. Working anonymously behind the scenes.
- Not having any way to stand out, or feeling that accomplishments go unnoticed; a lack of recognition. A poor social atmosphere.
- A highly predictable work environment; repetitive tasks; lack of variety.
- Red tape; being closely monitored or having to get approval for every decision, and an excessive amount of documentation.

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## DEVELOPMENT INSIGHT

### ACTION PLAN

You have the natural assertiveness and competitiveness for any suggestive selling duties that are a part of many service roles; capitalize on these traits by fine tuning your skill set, and take your natural aptitude to the next level. Set attainable, realistic goals, and establish a career path with your manager. Work on toning down your forcefulness with customers if this is a problem area for you.

**Coaching areas:** Collaboration, compromise, and communicating with diplomacy.

Make sure you are sufficiently objective in your approach to assessing customers' needs and concerns. When working with analytical customers, be specific when discussing account issues and explaining how to resolve them.

**Coaching areas:** Questioning techniques, active listening, task concentration and knowledge of all available options for customers.

Plan your time realistically, prioritize your work, and maintain focus to avoid overextension. Establish short-term performance objectives to help you measure progress and stay on track. Break long-range goals or assignments into shorter stages.

**Coaching areas:** Prioritizing workload, managing time, and organization.

Ensure checks and balances are in place to help you with details, follow-through, and account documentation. Be aware of essential guidelines, corporate protocol and best practices related to customer service. Ask your manager to set parameters but to give you some latitude within them.

**Coaching areas:** Managing details such as preparing reports, composing correspondence, entering orders and other data, maintaining customer account records, and call preparation.