

Supplemental Appraisal Tool - Service Orientation Factor

Important: The Service Orientation Factor is a non-counting factor for the 2009 Performance Appraisals

The rating for Service Orientation ***WILL NOT be included in the calculations of the overall evaluation rating for the 2009 performance appraisal.*** However, Human Resources Management is encouraging both supervisors and employees to become aware of the new factor now and to discuss the new factor during the current (2009) review cycle in anticipation of when it will become a formal factor for the 2010 cycle.

Why We Are Including This Supplemental Factor Now? The chief purpose of including this factor in appraisal discussions for 2009 is to raise awareness. It is being included to give both supervisor and employee advance notice to the fact that it will become a permanent, counting factor on the 2010 annual performance appraisal instruments. For the upcoming review period for 2009, HRM is asking all supervisors to evaluate employees on service orientation as a separate, **non-counting factor**. This form is provided: (1) to facilitate the discussion between supervisors and employees and (2) to conduct a test or dry run evaluation on the employee's service orientation skills. Supervisors should send this supplemental rating form to HRM under a separate cover.

Defining Service Orientation: Simply stated, service orientation refers to how we treat our customers, colleagues and co-workers. Service is about our desire to be helpful and responsive to our customers, whoever they may be. See more specific examples on the attached instructions.

SERVICE ORIENTATION RATING

Please evaluate the service orientation of the employee by choosing one of the five (5) ratings below. To help understand the differences between the five rating categories, consider the examples found in the instructions. Also, please add appropriate comments, training needs and goals discussed by the supervisor and the employee.

Exemplary Strong Performance Fully Successful Needs Improvement Deficient

Examples/Comments/Training Needs/Service Orientation Goals Discussed for 2010:

Supervisors, please make two copies of this page. Keep one for your records, give one to your employee, and return the original to Human Resources at Campus Mail AD-10. NOTE: The form will not be placed in the employee's personnel file. Please do not include the employee's name on this form. It is for research by HR staff and identification of potential training issues.

January 21, 2010

The University of Texas at Dallas' Principles of Service - Instructions for Supervisors

Service Orientation (i.e. customer service) is the commitment to providing timely and value-added services to both external and internal customers of the University, including attitude, knowledge, technical support and quality of service. It is a function of how well our employees are able to constantly and consistently exceed the needs and expectations of its constituents and customers. Please consider the following examples as guidelines when you assess your employee. The descriptors illustrate varying levels of a service orientation. Supervisors are encouraged to use this information in their "test" evaluation and discussion of what it means to provide outstanding service.

Exemplary	Strong Performance	Fully Successful	Needs Improvement	Deficient
<p>★ Always demonstrates an "open door" and welcoming relationship with all customers, internal and external. ★ Creates trust through professional, polished, superior communication skills.</p> <p>★ Demonstrates superior listening skills - clarifies, asks questions, demonstrates active listening behaviors. ★ Routinely and consistently demonstrates superior professional and relational phone skills; phone skills go beyond common courtesy and professional manners. ★ Regularly and routinely demonstrates service above and beyond their assigned duties and job responsibilities. ★ Applies superior problem solving skills for every service transaction with both internal and external customers; routinely anticipates customer's needs. ★ Will expend extra efforts to research and find the best answer; willing to go beyond the scope of their own particular area of responsibility even beyond the greater University.</p> <p>★ Very familiar with other resources and uses of them effectively.</p> <p>★ Habitually follows up and willingly takes additional steps in order to ensure that service needs were met or exceeded. ★ Exemplifies pride in their physical surroundings and professional appearance, including keeping a personal workspace that is welcoming, clean and organized.</p> <p>★ Routinely and effortlessly puts people at ease when interacting or responding to customer questions,</p>	<p>★ Demonstrates an "open door" and welcoming relationship with all customers, internal and external.</p> <p>★ Creates trust through professional communication skills.</p> <p>★ Demonstrates professional listening skills - clarifies, asks questions, and active listening behaviors. ★ Regularly demonstrates professional and relational phone skills; phone skills go beyond common courtesy and professional manners. ★ Regularly demonstrates service beyond their assigned duties and job responsibilities. ★ Regularly applies problem solving skills to service transaction with both internal and external customers; anticipates customer's needs. ★ Will expend extra efforts to find the best answer; willing to go beyond the scope of their own particular area of responsibility. ★ Familiar with other resources and uses of them effectively. ★ Regularly follows up and takes additional steps in order to ensure that service needs are met and often exceeded. ★ Takes pride in their physical surroundings and professional appearance, including keeping a personal workspace that is welcoming, clean and organized. ★ Routinely puts people at ease when interacting or responding to customer questions, needs and concerns. ★ Creates a sense of assurance and competence in their service interactions. ★ Routinely gives</p>	<p>★ Regularly demonstrates an "open door" and welcoming relationship with customers. ★ Consistently demonstrates professional communication skills.</p> <p>★ Demonstrates professional listening skills – regularly applies appropriate questions, and active listening behaviors.</p> <p>★ Demonstrates professional and relational phone skills; shows consistency in being courteous and professional. ★ Often offers service beyond their assigned duties and job responsibilities.</p> <p>★ Demonstrates problem-solving skills to service transaction with both internal and external customers; works hard to anticipate customer's needs.</p> <p>★ Often makes extra efforts to find the best answer even going beyond the scope of their own particular area of responsibility. ★ Generally familiar with other resources and often uses of them effectively.</p> <p>★ Makes concerted efforts to regularly follow up and take additional steps in order to ensure that service needs are met. ★ Takes pride in their physical surroundings and professional appearance, generally keeps a personal workspace that is welcoming, clean and organized. ★ Works hard to put people at ease when interacting or responding to customer questions, needs and concerns.</p> <p>★ Demonstrates assurance and competence in their service</p>	<p>★ Shows acceptable progress toward the ability to establish a welcoming relationship with all customers' internal and external.</p> <p>★ Demonstrates adequate progress toward the development of basic professional communications skills. ★ Needs to develop additional skills to put customers at ease when they are providing service. ★ Has some difficulty in appropriately communicating with others. ★ Is learning to demonstrate professional and courteous demeanor over the phone. ★ Has not mastered the more difficult aspects of their assigned duties and is learning to display an availability to help others. ★ Maintains a neat appearance and is working toward a more professional personal appearance with maintenance of a professional workplace. ★ Seems to have the talent and is developing the skills to solve the problems of both internal and external customers.</p> <p>★ Is developing good listening skills. ★ Does not always deal appropriately with angry or upset customers. ★ Occasionally lacks the patience to deal with the customer's needs. ★ For the most part, is respectful, personable and positive in their interactions with customers'.</p> <p>★ Has difficulty taking responsibility for mistakes and</p>	<p>★ Fails to offer a welcoming relationship to customers, internal and external. ★ Is abrasive and/or awkward when interacting with customers, often making them feel ill at ease. ★ Is unsure and/or unprofessional in their service interactions with others. ★ Doesn't appear interested or engaged in meeting customer needs; can be inattentive and short with customers. ★ Often seems "put out" when asked to assist customers. ★ Has poor phone skills. ★ Does not follow through with their assigned duties and does not willingly offer assistance to others.</p> <p>★ Does not maintain a professional appearance; does not keep a clean, organized personal workspace. ★ Does not demonstrate an interest or ability to engage in problem solving skills.</p> <p>★ Demonstrates poor listening skills; displays no interest in becoming an effective listener. Becomes defensive or unprofessional under pressure and as a result, may further agitate angry or upset customer. ★ Is unwilling to accept responsibility for mistakes and inconveniences; will rarely apologize, even when appropriate to do so.</p> <p>★ Delivery of service is slow; rarely meets customer expectations. ★ Lacks adequate knowledge of the appropriate policies and procedures and cannot explain the rationale when a customer's request can't be delivered. ★ Focuses on what can't be done rather than looking for solutions. ★ Makes inappropriate use of transfers. ★ Rarely follows up with the customer to insure their service needs were met.</p>

<p>needs and concerns. ★Creates a sense of assurance and competence in all their service interactions. ★Routinely and consistently gives customers their undivided attention; is patient and attentive to customer needs, regardless of situation. ★Superior ability to remain calm and assuring (able to diffuse the situation) when assisting angry or upset customers. ★Demonstrates an unhesitating willingness to take responsibility for mistakes and inconveniences and pursues efforts to repair and restore damaged relationships, including apologizing when appropriate. ★Exceeds customer expectations in the timeliness of their delivery of service. ★Ensures that the customer understands the policies and procedures, and/or rationale when their request can't be delivered. ★Strong emphasis on what can be done; solution focused. ★Quick to recognize when it is necessary and appropriate to transfer customers to other persons and/or departments so the customer will receive the desired help. ★When transfers are made they are consistently appropriate and professionally handled. ★Takes the initiative to assist in all efforts to recognize outstanding customer service among colleagues and co-workers. ★Committed to personally evaluating and assessing their customer service skills and demonstrates a readiness to learn from the feedback received.</p>	<p>customers their undivided attention; is patient and attentive to customer needs. ★Demonstrates the ability to remain calm and assuring when assisting angry or upset customers. ★Demonstrates willingness to take responsibility for mistakes and inconveniences and pursues efforts to repair and restore damaged relationships. ★ Attempts to exceed customer expectations in the timeliness of their delivery of service. ★Works to insure that the customer understands the policies and procedures, and/or rationale when their request can't be delivered. ★Places emphasis on what can be done; solution focused. ★Recognizes when it is necessary and appropriate to transfer customers to other persons and/or departments so the customer will receive the desired help. ★When transfers are made they are consistently appropriate and professionally handled. ★Routinely takes the initiative to assist in efforts to recognize others who provide outstanding customer service. ★Routinely works to evaluate and develop their customer service skills and demonstrates a readiness to learn from the feedback received.</p>	<p>interactions. ★ Gives customers their undivided attention; generally demonstrates patience and attention to customer needs. ★Demonstrates the ability to remain calm and assuring when assisting angry or upset customers. ★Takes responsibility for mistakes and inconveniences and pursues efforts to repair and restore damaged relationships. ★ Attempts to meet customer expectations in the timeliness of their delivery of service. ★Has a grasp on policies and procedures, and/or rationale when their request can't be delivered and works to help the customer understand why service can't be delivered. ★Generally solution focused. ★Generally knows when it is necessary and appropriate to transfer customers to other persons and/or departments so the customer will receive the desired help. ★When transfers are made they are appropriate and professionally handled. ★Often takes the initiative to assist in efforts to recognize others who provide outstanding customer service. ★Seeks feedback and evaluation to improve their abilities and skills at delivering quality customer service.</p>	<p>inconveniences but tries to repair and restore damaged relationships. ★Tries to show a willingness to help within their skill level. ★Occasionally misses deadlines and expectations for timely service. ★Is working to develop an adequate knowledge base to explain policies and procedures. ★Has some difficulty determining the proper time and proper person and department to transfer customers so they can receive the service needed. ★Does not always adequately follow up on service interactions. ★Shows some willingness to learn from evaluation activities and works to improve their delivery of service.</p>	<p>★Demonstrates little interest in learning or using additional university resources to satisfy the service needs of their customers★ Seldom makes effective referrals to such resources. ★ Demonstrates no interest or commitment to evaluating their customer service skills or to learn from such activities.</p>
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