

# Phone Banker – One Sitting

## Assessment Fact Sheet

### Overview

The Phone Banker solution is for entry to mid-level financial institution positions. Sample tasks for this job would include, but are not limited to: explaining products, services and prices to customers, obtaining and entering customer information such as name and address into a computer, and maintaining records of customer accounts.

Job Level	Entry Level
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Job Family/Title	Banking
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### Details

Number of Sitzings	One
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Designed for Unproctored Environment	Yes
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Question Format	Multiple Choice, Simulation
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### Knowledge, Skills, Abilities and Competencies Measured

**Navigation:** This measures a candidate's interactions within a realistic contact center environment by providing a workspace that simulates multiple customer service-based applications running on a Windows desktop simultaneously.

**Service Orientation:** This measures a candidate's tendency to focus on meeting customers' needs in a simulated telephone call context. This includes the tone and language used to respond to customers' questions, apologizing when appropriate, and providing solutions that directly relate to customers' requests.

**Tactful Problem Solving:** This measures a candidate's tendencies to engage in problem solving with customers in the context of simulated telephone calls. This includes acquiring necessary information from both customers and systems to understand the nature of the problem, working through ambiguity to determine the correct answer, and tactfully explaining the resolution of the situation to customers.

**Data Entry Speed:** This measures a candidate's ability to listen to and record information received from customers quickly.

**Data Entry Accuracy:** This measures a candidate's ability to listen to and record information received from customers accurately.

**Contact Center Retention:** This measures a candidate's background, experiences, attitudes, judgments, and opinions that are associated with increased job tenure in entry-level contact center positions. This is reported as a separate score on the score report and is not included in the Overall Score.

**Persistence:** This is a measure of the tendency to set specific goals and work hard to achieve these goals. This trait is characterized by: suggesting the best solution for customer needs; being able to direct conversations towards a commitment/order/sale; and continuing to try if not successful the first time.

## Example Question

The screenshot displays a QueueTek Agent Software interface. At the top, there are 'Sound Controls' for 'Replay Last Sound' and 'Volume'. Below this, the software window shows 'Answer Call' and 'Transfer Call to Supervisor' buttons. A navigation bar includes 'Reliable Insurance', 'Access Wireless', 'Freedom Card', and 'TravelNet'. The main content area is titled 'Find Rental Vehicle' and features a search form with 'Type of Vehicle' set to 'SUV' and 'Model' set to 'Full-Sized SUV'. A 'Search' button is present. Below the search form, the results for a 'Selected Vehicle : SUV / Full-Sized' are shown, including a 'Daily rate : \$200.00', 'Seating capacity : 6 people', and lists of 'Standard features' (Air conditioning, Automatic transmission, Oversized trunk, Luggage rack) and 'Optional features' (Infant/toddler car seats, GPS navigation system). A 'Submit' button is located at the bottom of the search results area.

On the right side of the interface, a 'Select Your Response' panel is visible. It contains the following text:

**Select Your Response**

*The full-sized SUV with four doors seats 6 and has other great features.*

The SUV meets your requirements; are there specific features of the SUV that you'd like to hear about?

The full-sized SUV with four doors seats 6, has an oversized trunk, air conditioning, a luggage rack as well as automatic transmission.

**Submit**

At the bottom of the interface, there is a 'PREVISOR' logo, a 'Time Remaining: 1h : 2m : 52s' timer, 'Next' and 'Exit' buttons, and the text 'Question 8 of 8' and 'POWERED BY PREVISOR'.

**Example Report**

**Recruiter Report : Phone Banker - Short Form**



**Applicant Information**

**Name:**  
**Application Date:** Tue Mar 24 18:01:00 EDT 2009  
**Applicant ID:** 3387  
**Session ID:** 02560603302718

This report is confidential and its contents are intended to assist in the prediction of an applicant's work behavior. If you would like more information about this interpretive report or other products that PreVisor offers, please contact your account representative.

**Overall Score**

**Recommended** ✓

Percentile	Low	Medium	High
	30	70	100

**Overall Score** 83

**Detailed Results**

	Percentile	Low	Medium	High
		30	70	100
<b>Navigation</b>	69			
<b>Service Orientation</b>	70			
<b>Tactful Problem Solving</b>	68			
<b>Data Entry Speed</b>	82			
<b>Data Entry Accuracy</b>	75			
<b>Contact Center Retention</b>	48			
<b>Persistence</b>	49			

**Score Interpretation**

**Navigation**

This measures a candidate's interactions within a realistic contact center environment by providing a workspace that simulates multiple customer service-based applications running on a Windows desktop simultaneously.

The candidate will usually be able to navigate and find information using multiple systems. At times, he/she may have difficulty detecting specific information that is needed and may work more slowly when navigating than others.