



**OCCUPATIONAL CATEGORY**  
Marketing Management Series

**INSTRUCTIONAL AREA**  
Emotional Intelligence

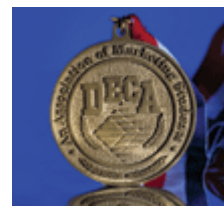
## **PARTICIPANT INSTRUCTIONS**

### **PROCEDURES**

1. The event will be presented to you through your reading of these instructions, including the Performance Indicators and Event Situation. You will have up to 10 minutes to review this information to determine how you will handle the role-play situation and demonstrate the performance indicators of this event. During the preparation period, you may make notes to use during the role-play situation.
2. You will give an ID label to your adult assistant during the preparation time.
3. You will have up to 10 minutes to role-play your situation with a judge (you may have more than one judge).
4. You will be evaluated on how well you meet the performance indicators of this event.
5. Turn in all your notes and event materials when you have completed the role-play.

### **PERFORMANCE INDICATORS EVALUATED**

1. Explain the role of training and human resource development.
2. Reinforce service orientation through communication.
3. Explain the nature of positive customer/client relations.
4. Foster positive working relationships.
5. Demonstrate a customer-service mindset.



## **EVENT SITUATION**

You are to assume the role of operations manager at FARMERS FEDERAL CREDIT UNION. The president of the credit union (judge) has asked you to develop a plan to train new cashiers in customer relations.

FARMERS FEDERAL CREDIT UNION is a large credit union that has been serving the region's farmers for over 50 years. The credit union maintains a positive relationship with community members. As a result, the credit union grows substantially each year.

The results of a recent customer survey were favorable. However, the survey indicated that some clients feel that employees are not friendly to customers. This concerns the president (judge). He/she has taken steps to address the issue with current employees, and have made some changes.

The president (judge) knows that you provide excellent training to cashiers in operational procedures. Based on the recent survey and changes already made, he/she wants to be sure new employees receive excellent training in customer/client relationships. The president (judge) has asked you to demonstrate that you possess the expertise to provide this training to new cashiers.

The president (judge) would like you to share your training topics for orienting new cashiers in customer relations. You should develop a list of the most important issues and discuss them with the president (judge). The president (judge) wants to be sure that you can relate to new employees, give concise directions and provide information related to employee/customer complaints. The president (judge) has indicated that you can include new and creative ways to ensure that employees are well trained and happy in their jobs.

You will present your training ideas in a role-play will take place in the president's (judge's) office. The president (judge) will begin the role-play by greeting you and asking to hear about your plans. After you have completed your presentation and have answered the president's (judge's) questions, the president (judge) will conclude the role-play by thanking you for your work.

## **JUDGE'S INSTRUCTIONS**

### **DIRECTIONS, PROCEDURES AND JUDGE'S ROLE**

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. Performance Indicators
3. Event Situation
4. Judge Role-play Characterization
5. Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
6. Judge's Evaluation Instructions
7. Judge's Evaluation Form

### **JUDGE ROLE-PLAY CHARACTERIZATION**

You are to assume the role of president of FARMERS FEDERAL CREDIT UNION. You have asked the operations manager (participant) to develop training in customer relations to the credit union's cashiers.

FARMERS FEDERAL CREDIT UNION is a large credit union that has been serving the region's farmers for over 50 years. The credit union maintains a positive relationship with community members. As a result, the credit union grows substantially each year.

Results of a recent customer survey were favorable. However, the survey indicted that some clients feel that employees are not friendly to customers. This information has caused you some concern. You have taken steps to address the issue with current employees and have made some changes.

You know that the operations manager (participant) provides excellent training in operational procedures. Based on the recent survey and changes made in the office, you want to be sure new employees receive excellent training in customer/client relationships. You have asked the operations manager (participant) to demonstrate his/her expertise in providing training to new cashiers.

You have asked the operations manager (participant) to share with you his/her training topics for orienting new cashiers in customer relations. You have told the operations manager (participant) to develop a list of the most important issues to discuss with you. You want to be sure that he/she can relate to new employees, give concise directions and provide information related to employee/customer complaints. You have indicated that the operations manager (participant) can include new and creative ways to ensure that employees are well trained and happy in their jobs.

You will meet with the operations manager (participant) in a role-play to take place in your office. You will begin the meeting by greeting the operations manager (participant) and asking to hear his/her ideas.

During the course of the role-play you are to ask the following questions of each participant:

1. How does a new employee tend to handle customer complaints?
2. What do you consider the most important topic in your training information?
3. Why is it important to have feedback from employees during training?

After the operations manager (participant) has completed the presentation and has answered your questions, you will conclude the meeting by thanking the operations manager (participant) for his/her work.

You are not to make any comments after the event is over except to thank the participants.

## **JUDGE'S EVALUATION INSTRUCTIONS**

### **Evaluation Form Information**

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

### **Evaluation Form Interpretation**

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 <sup>th</sup> percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 <sup>th</sup> percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 <sup>th</sup> percentile of business personnel performing this performance indicator.

## JUDGE'S EVALUATION FORM

MMS

Emotional Intelligence

DID THE PARTICIPANT:

### 1. Explain the role of training and human resource development?

**Little/No Value**

**0, 2**

Attempts to explain the role of training and human resource development were weak or inadequate.

**Below Expectations**

**4, 6, 8**

Adequately explained the role of training and human resource development.

**Meets Expectations**

**10, 12, 14**

Effectively explained the role of training and human resource development.

**Exceeds Expectations**

**16, 18**

Very effectively explained the role of training and human resource development.

### 2. Reinforce a service orientation through communication?

**Little/No Value**

**0, 2**

Attempts to reinforce a service orientation through communication were inadequate or unclear.

**Below Expectations**

**4, 6, 8**

Adequately reinforced a service orientation through communication.

**Meets Expectations**

**10, 12, 14**

Effectively reinforced a service orientation through communication.

**Exceeds Expectations**

**16, 18**

Very effectively reinforced a service orientation through communication.

### 3. Explain the nature of positive customer/client relations?

**Little/No Value**

**0, 2**

Attempts to explain the nature of positive customer/client relations were unclear or inadequate.

**Below Expectations**

**4, 6, 8**

Adequately explained the nature of positive customer/client relations.

**Meets Expectations**

**10, 12, 14**

Effectively explained the nature of positive customer/client relations.

**Exceeds Expectations**

**16, 18**

Very effectively explained the nature of positive customer/client relations.

### 4. Foster positive working relationships?

**Little/No Value**

**0, 2**

Attempts to foster positive working relationships were unclear or inadequate.

**Below Expectations**

**4, 6, 8**

Adequately demonstrated how to foster positive working relationships.

**Meets Expectations**

**10, 12, 14**

Effectively demonstrated how to foster positive working relationships.

**Exceeds Expectations**

**16, 18**

Very effectively demonstrated how to foster positive working relationships.

### 5. Demonstrate a customer-service mindset?

**Little/No Value**

**0, 2**

Attempts to demonstrate a customer-service mindset were unclear or inadequate.

**Below Expectations**

**4, 6, 8**

Adequately demonstrated a customer-service mindset.

**Meets Expectations**

**10, 12, 14**

Effectively demonstrated a customer-service mindset.

**Exceeds Expectations**

**16, 18**

Very effectively demonstrated a customer-service mindset.

### 6. Overall impression and response to the judge's questions:

**Little/No Value**

**0, 1**

Demonstrated few skills; could not answer the judge's questions.

**Below Expectations**

**2, 3, 4**

Demonstrated limited ability to link skills; answered the judge's questions adequately.

**Meets Expectations**

**5, 6, 7**

Demonstrated the specified skills; answered the judge's questions effectively.

**Exceeds Expectations**

**8, 9, 10**

Demonstrated skills confidently and professionally; answered the judge's questions very effectively and thoroughly.

Judge's Initials \_\_\_\_\_

TOTAL SCORE \_\_\_\_\_