



**BRAD WORTHLEY**  
INTERNATIONAL

# **THE PLATFORM AND OUTSTANDING CUSTOMER SERVICE**

**VIDEO #3**

**VIEWER:** \_\_\_\_\_

**DATE FIRST VIEWED:** \_\_\_\_\_

**PERSONAL ACTION PLAN TO ACCOMPANY VIDEO #3**

## INSTRUCTIONS

This worksheet is designed to accompany the videotape **BRAD WORTHLEY ON: THE PLATFORM AND OUTSTANDING CUSTOMER SERVICE** and will act as a **PERSONAL ACTION PLAN** towards self-improvement. The workbook does not fully cover all the details in the videotape, so taking notes is recommended. Make notes either in the area headed "LIST OPPORTUNITIES WITH WHICH YOU CAN BETTER SERVE", or anywhere room allows. The videotape and Personal Action Plan also reflect the order in which the steps should be taken in most cases.

## BEFORE VIEWING THE VIDEO

- A. READ THROUGH THE PERSONAL ACTION PLAN** and score yourself honestly (*from 1 to 5*) based on your own perception of your current performance (*before viewing the video*), in each of the nine sections. Do not fill out any other part of the worksheet or take notes at this time.
- B. VIEW THE VIDEO.** After each section is covered in the video, there will be a message to "PAUSE THE VIDEO NOW". It will also direct you to which section of the Personal Action Plan to complete at this time. You should check off the points in each section that you might want to improve upon.
- C. AFTER VIEWING THE COMPLETE VIDEO, RE-SCORE (*from 1 to 5*) YOUR CURRENT PERFORMANCE** based on the information provided in the video. You should also take time to list opportunities with which you could better serve your customers or make any other notes desired in each section. If the video proceeded too fast for you, you may want to replay sections before continuing.
- D. REVIEW THE BOOKLET EACH DAY** before you begin work to refresh yourself on the steps you personally need to take in order to provide all of your customers with outstanding service. Concentrate on any section where you scored yourself less than a "5". You may want to focus on only one or two sections a week until your changes become routine behavior.
- E. RE-SCORE YOURSELF 30 DAYS AFTER YOU FIRST VIEWED THE VIDEO.** Do this in the 30 day follow-up area of the Personal Action Plan.

## SCORING CRITERIA:

- 5 = OUTSTANDING** (Could not do anything better)  
**4 = GOOD** (Do well, but some change possible)  
**3 = ADEQUATE** (Not good, but not bad either)  
**2 = NEED WORK** (Could use noticeable change in this area)  
**1 = POOR** (Need lots of work)

### SECTION 1: ACKNOWLEDGING YOUR CUSTOMERS

- 1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (Before viewing the video)  
1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (After viewing the video)  
1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (After 30 days)

- Check the points you want to improve on:
- A BRIEF COMMENT ("HI, I WILL BE RIGHT WITH YOU")
  - BODY ENGLISH (HOLDING UP INDEX FINGER)
  - GOOD EYE CONTACT
  - THANK CUSTOMERS WHO HAVE BEEN WAITING

#### LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS

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### SECTION 2: STANDING TO GREET YOUR CUSTOMER

- 1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (Before viewing the video)  
1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (After viewing the video)  
1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (After 30 days)

- Check the points you want to improve on:
- STAND IMMEDIATELY AS YOUR CUSTOMERS APPROACH
  - DON'T ANALYZE WHO YOU SHOULD & SHOULD NOT STAND FOR

#### LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS

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### SECTION 3: OFFERING YOUR CUSTOMERS A HANDSHAKE

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (*Before* viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (*After* viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (*After* 30 days)

Check the points you want to improve on:

- OFFER HANDSHAKE DURING YOUR INTRODUCTION
- DO NOT LET GENDER AFFECT HANDSHAKING DECISIONS
- HANDSHAKES ARE ALSO APPROPRIATE UPON DEPARTURE
- IF UNCOMFORTABLE, PRACTICE WITH FELLOW WORKERS

LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS

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### SECTION 4: GREETING YOUR CUSTOMERS WARMLY

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (*Before* viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (*After* viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (*After* 30 days)

Check the points you want to improve on:

- SOCIAL PLEASantry
- SMILE
- GOOD EYE CONTACT
- CALL THE CUSTOMER BY NAME
- SINCERITY
- VOICE INFLECTION (SOUND FRIENDLY & ENTHUSIASTIC)

LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS

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### SECTION 5: EXCHANGING NAMES

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (*Before* viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (*After* viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (*After* 30 days)

Check the points you want to improve on:

- BEST DONE WHILE SHAKING HANDS
- WRITE IT DOWN IMMEDIATELY SO YOU DON'T FORGET

LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS

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**SECTION 6: OFFERING YOUR CUSTOMERS A SEAT**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (Before viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (After viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (After 30 days)

Check the points you want to improve on:  OFFER ALL OF YOUR CUSTOMERS SEATS REGARDLESS OF NEEDS  
 BEST OFFERED IMMEDIATLEY AFTER INTRODUCTIONS

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 7: OFFERING YOUR BUSINESS CARD**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (Before viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (After viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (After 30 days)

Check the points you want to improve on:  OFFER YOUR CARD BEFORE YOUR PRESENTATION  
 OFFER A COUPLE MORE AT END AS A REFERRAL OPPORTUNITY

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 8: USING YOUR CUSTOMER'S NAME IN CONVERSATION**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (Before viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (After viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (After 30 days)

Check the points you want to improve on:  USE LAST NAME OF CUSTOMER IF UNCOMFORTABLE WITH FIRST  
 USE MS. IF UNSURE OF WOMEN'S MARITAL STATUS  
 ASK CUSTOMERS W/DIFFICULT NAMES HOW TO PRONOUNCE

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 9: BEING FRIENDLY**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (*Before* viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (*After* viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (*After* 30 days)

- Check the points you want to improve on:  SMILE  
 VOICE INFLECTION (SOUND FRIENDLY & ENTHUSIASTIC)

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 10: PROVIDING YOUR UNDIVIDED ATTENTION**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (*Before* viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (*After* viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (*After* 30 days)

- Check the points you want to improve on:  GOOD EYE CONTACT  
 EXCUSE YOURSELF IF INTERRUPTED  
 USE THEIR NAME WHEN EXCUSING YOURSELF  
 GIVE BRIEF EXPLANATION OF WHY  
 GIVE AN ESTIMATE OF HOW LONG  
 THANK THEM UPON RETURN

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 11: ASKING QUESTIONS TO DETERMINE YOUR CUSTOMERS NEEDS**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (*Before* viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (*After* viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (*After* 30 days)

- Check the points you want to improve on:  ASK QUESTIONS BEFORE PRESENTING PRODUCTS / SERVICES  
 PAUSE DURING PRESENTATION IF CUSTOMER HAS QUESTIONS  
 BE A GOOD LISTENER

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 12: EXPLAINING PRODUCTS & SERVICES**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (*Before* viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (*After* viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (*After* 30 days)

- Check the points you want to improve on:
- OFFER BRIEF EXPLANATION OF BANK TERMS IF USED
  - DIAGRAMS, CHARTS OR GRAPHS ARE VERY HELPFUL
  - ASK IF CUSTOMER HAS QUESTIONS AT END OF PRESENTATION

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 13: RECOMMENDING ADDITIONAL PRODUCTS OR SERVICES**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (*Before* viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (*After* viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (*After* 30 days)

- Check the points you want to improve on:
- EDUCATE YOUR CUSTOMERS TO NEW PRODUCTS OR SERVICES
  - LOOK AND LISTEN FOR OTHER SALES OPPORTUNITIES

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 14: ASKING FOR YOUR CUSTOMER'S BUSINESS**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (*Before* viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (*After* viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (*After* 30 days)

- Check the points you want to improve on:
- DON'T BE AFRAID TO ASK FOR THE CUSTOMERS' BUSINESS
  - IF YOUR CLOSING TECHNIQUE ISN'T WORKING, TRY A NEW ONE
  - BE SINCERE AND STRAIGHT FORWARD

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 15: ASKING FOR YOUR CUSTOMER'S ADDRESS OR PHONE #**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (Before viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (After viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (After 30 days)

Check the points you want to improve on:

- DON'T BE AFRAID TO ASK THE QUESTION
- ONCE YOU HAVE THE INFO, USE IT TO PURSUE THE BUSINESS

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**SECTION 16: SINCERELY THANKING YOUR CUSTOMERS**

1 2 3 4 5 SCORE YOUR CURRENT PERFORMANCE (Before viewing the video)

1 2 3 4 5 RE-SCORE YOUR CURRENT PERFORMANCE (After viewing the video)

1 2 3 4 5 30 DAY FOLLOW-UP SCORE OF PERFORMANCE (After 30 days)

Check the points you want to improve on:

- SMILE
- GOOD EYE CONTACT
- SINCERITY
- VOICE INFLECTION (SOUND FRIENDLY & ENTHUSIASTIC)
- A WARM "THANK YOU"
- USE THE CUSTOMER'S NAME IF AVAILABLE

**LIST OPPORTUNITIES WITH WHICH YOU COULD BETTER SERVE YOUR CUSTOMERS**

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**TOTAL SCORE OF CURRENT PERFORMANCE:**

(Before viewing the video)

\_\_\_\_\_ Possible 80 points (Add total of all 16 steps)

**TOTAL RE-SCORE OF CURRENT PERFORMANCE:**

(After viewing the video)

\_\_\_\_\_ Possible 80 points (Add total of all 16 steps)

**TOTAL 30 DAY FOLLOW-UP SCORE OF PERFORMANCE:**

(After working on the steps with scores of less than 5)

\_\_\_\_\_ Possible 80 points (Add total of all 16 steps)

**ADDITIONAL NOTES**

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