

Group based Assessment Center Activities for Client Service Specialist

Instructions for using Template during the Interview

The purpose of this template is to provide a guide for using these Group Based Exercises during an Assessment Center for hiring new candidates.

It provides a structured approach to evaluating candidates based on their technical and behavioral competencies required for the role.

Please follow the instructions below to ensure a fair and consistent evaluation of each candidate.

1. **Review the Technical and Behavioral Competency Requirements for the Role:** Please refer to Section 1 to review the technical and behavioral competency requirements for the role. This will help you understand the key skills, knowledge, and behaviors that are essential for the candidate to possess to be successful in the role.
2. **Use the Group-Based Exercises as Assessment Center Activities:** Please refer to Section 2 & 3 of this template to understand the different group-based exercises that you can use to assess the candidates. Each exercise has been designed to evaluate specific competencies required for the role.
3. **Complete the Assessor Evaluation Form:** Please use the Assessor Evaluation Form provided towards the end of Section 2 & 3 to record your ratings and observations about the candidate during the specific assessment center activity. This form will help you capture your feedback on the candidate's performance during the exercises and their overall fit for the role.
4. **Maintain Objectivity and Fairness:** Please ensure that you remain objective and fair throughout the assessment process. Avoid making assumptions or drawing conclusions based on factors that are not related to the candidate's



Template Collection

performance. Also, ensure that you provide feedback based on the candidate's demonstrated behaviors rather than their personality or personal characteristics.

Section 1: Competencies Required For Technical Recruiter

Technical Competency Requirements:

- Demonstrates proficiency in using customer service software and tools to efficiently handle client inquiries and requests.
- Applies client onboarding and retention strategies to improve customer loyalty.
- Shows in-depth knowledge of the products and services offered by the organization.
- Utilizes data analysis and reporting tools to generate.
- Utilizes CRM systems to manage and track client interactions, resulting in accurate and up-to-date client records.

Behavioral Competency Requirements:

- Communicates effectively with clients and colleagues, resulting in successful client interactions.
- Establishes strong relationships with clients and network partners, building trust and increasing business opportunities.
- Applies strong problem-solving and analytical skills to identify and resolve client escalations in a timely manner.
- Collaborates effectively with colleagues, contributing to team goals and promoting a positive team culture.
- Demonstrates strong attention to detail in all tasks, ensuring quality service delivery to clients.
- Prioritizes effectively and handles multiple tasks simultaneously, managing time and resources efficiently.
- Adapts to changing situations with flexibility and resilience, maintaining a positive attitude and a solutions-focused approach.
- Demonstrates understanding of client needs, providing client-centric solutions.
- Actively seeks out opportunities to learn skills and knowledge, contributing to personal and organizational growth.

Section 2: First Group Based Exercise

Activity Description: Role-Play

Name of Group Based Exercise: "Client Inquiry Handling Simulation"

Objective: To assess the participant's proficiency in using customer service software and tools to efficiently handle client inquiries and requests.

Competencies that will be assessed:

- Demonstrates proficiency in using customer service software and tools to efficiently handle client inquiries and requests.
- Utilizes CRM systems to manage and track client interactions, resulting in accurate and up-to-date client records.

Instructions for the assessor:

- Set up a simulated client inquiry handling scenario, where the participants are required to use the organization's customer service software and tools to handle client inquiries and requests.
- Observe the participant's ability to use the software and tools efficiently and effectively to provide accurate and timely responses to the simulated client inquiries.
- Evaluate the participant's ability to utilize the CRM system to manage and track client interactions, resulting in accurate and up-to-date client records.

Instructions for the participants:

- Assume the role of a customer service representative.
- Use the organization's customer service software and tools to handle simulated client inquiries and requests.
- Utilize the CRM system to manage and track client interactions and maintain accurate and up-to-date client records.

List of Job Aids that will be required to perform the activity:

- Organization's customer service software and tools
- CRM system

Assessment Center Activity Assessor Evaluation Form

Participant Name:	
Assessor Name:	
Date:	

Instructions: Please provide ratings and observations based on the participant's performance during the assessment center activity. Use the rating scale below and provide specific examples to support your ratings.

Rating Scale:

- 1 = Below Expectations
2 = Meets Expectations
3 = Exceeds Expectations

Competencies Assessed	Rating	Observations
Demonstrates proficiency in using customer service software and tools to efficiently handle client inquiries and requests.		
Utilizes CRM systems to manage and track client interactions, resulting in accurate and up-to-date client records.		

Overall Assessment:

Based on the above criteria, please provide an overall assessment of the participant's performance during the assessment center activity.

Rating	
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Observations:

Please provide any additional comments or feedback about the participant's performance during the assessment center activity.

Additional Comments:

Signature	
Assessor	
Date	

Section 3: Second Group Based Exercise

Problem Solving Exercise: Group Discussion

Name of Group Based Exercise: "Client Retention Strategy Brainstorming"

Objective: To assess the participant's ability to apply client onboarding and retention strategies to improve customer loyalty and establish strong relationships with clients and network partners.

Competencies that will be assessed:

- Applies client onboarding and retention strategies to improve customer loyalty.
- Establishes strong relationships with clients and network partners, building trust and increasing business opportunities.
- Collaborates effectively with colleagues, contributing to team goals and promoting a positive team culture.

Instructions for the assessor:

- Set up a group discussion session, where the participants are required to brainstorm client onboarding and retention strategies to improve customer loyalty and establish strong relationships with clients and network partners.
- Observe the participant's ability to apply client onboarding and retention strategies and establish strong relationships with clients and network partners.
- Evaluate the participant's ability to collaborate effectively with colleagues, contribute to team goals, and promote a positive team culture.

Instructions for the participants:

- Assume the role of a team member.
- Participate in a group discussion to brainstorm client onboarding and retention strategies to improve customer loyalty and establish strong relationships with clients and network partners.
- Collaborate effectively with colleagues, contribute to team goals, and promote a positive team culture.

List of Job Aids that will be required to perform the activity:

- Whiteboard or flipchart
- Markers or pens
- Handouts or reference materials on client onboarding and retention strategies.

Assessment Center Activity Assessor Evaluation Form

Participant Name:	
Assessor Name:	
Date:	

Instructions: Please provide ratings and observations based on the participant's performance during the assessment center activity. Use the rating scale below and provide specific examples to support your ratings.

Rating Scale:

- 1 = Below Expectations
- 2 = Meets Expectations
- 3 = Exceeds Expectations

<i>Competencies Assessed</i>	<i>Rating</i>	<i>Observations</i>
Applies client onboarding and retention strategies to improve customer loyalty.		
Collaborates effectively with colleagues, contributing to team goals and promoting a positive team culture.		
Establishes strong relationships with clients and network partners, building trust and increasing business opportunities.		



Overall Assessment:

Based on the above criteria, please provide an overall assessment of the participant's performance during the assessment center activity.

Rating	
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Observations:

Please provide any additional comments or feedback about the participant's performance during the assessment center activity.

Additional Comments:

Signature	
Assessor	
Date	