

**Agency**

**Relational**

**Competency**

**Assessment**

**Tool**



**Independent  
Insurance  
Agents of Texas**



**Introduction:** In a study conducted by Janet Parish, Ph.D. of Mays Business School at Texas A&M University, agency relational competence was shown to have a significant impact on staff satisfaction and on the quality of relationships with agency customers. The study identified five interpersonal components of relational competency required to be successful in agency relationship management. They are:

**Listening** has been defined as “the cognitive process of actively sensing, interpreting, evaluating and responding to the verbal and nonverbal messages of present or potential customers” (Castleberry and Shepherd 1993, p. 36).

**Demonstrating empathetic behavior** shows that a customer contact employee can understand the perspective and viewpoint of the customer.

**Being reliable** involves keeping promises made to customers.

**Using knowledge to meet customer needs** is defined as the ability of an employee to demonstrate their understanding of how resources available to the employee can benefit the customer.

**Being friendly** is the ability of a frontline employee to demonstrate a warm and engaging personality to a firm’s customers.



**Instructions:** The supplemental interview guide and score sheet was developed as a way to subjectively assess the level of relational competency possessed by a given candidate. While the reliability and validity of the measures have been tested, we do not yet have enough data to determine how scores should be used in hiring decisions. Therefore, the scores should be used as a subjective assessment of relational competency as opposed to an absolute measure. However, when incorporated into a comprehensive hiring process, the use of this tool should provide valuable guidance in ranking one candidate over another. For more information on a comprehensive hiring process, see “A Marketing Approach to Hiring” in the Hiring Tool Kit on InfoCentral.

**Step 1:** Review the assessment guide with all personnel who will have any contact with employment candidates. The assessment process should begin with the agency’s first encounter with a candidate and continue throughout the evaluation process. Agency personnel should be familiar with the five relational competency components and be directed to note their perception of each candidate relative to these attributes.

**Step 2:** For each candidate that makes it past any initial screening process you may have, incorporate the attached supplemental interview guide into your normal interview process. The initial interview should be about the candidate. Save the sharing of information about the agency for a follow-up interview to avoid inadvertently coaching the candidate. If possible, have more than one person sit in on the interview for added perspective.

**Step 3:** Using input from all agency personnel that came in contact with the candidate, complete the score sheet for each relational competency component.

**Step 4:** Compute an overall relational competency score by averaging the five component means.



### **Supplemental Interview**

1. Imagine that you have promised to take a friend to a doctor's appointment and car trouble is causing you to be late. What would you do?
2. Describe the best experience you have had as a customer.
3. Describe the worst experience you have had as a customer.
4. Describe your most meaningful work experience.
5. Describe your most difficult work experience.



**Consider the following scenarios:**

*(for applicants with industry experience)*

6. A co-worker is on vacation and was planning to return today. She has been delayed and you've been asked to check her in-box. You find that the agency's most important client has received a non-renewal notice. You now have five days to handle this. The agency principal is unavailable. What would you do?
  
7. One of your agency's customers has an automobile accident that results in a \$100,000 lawsuit. They leave you a voice message asking what they should do. You review their account and determine that they only have \$20,000 coverage. You also have documentation that they declined higher coverage. What do you do?





Based on all information available for this applicant,  
I believe that he/she would...

|  | <i>strongly<br/>disagree</i> | <i>strongly<br/>agree</i> |
|--|------------------------------|---------------------------|
| focus only on their customer during an interaction                                   | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| ask for more detail and extra information during conversations with customers        | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| continually attempt to understand what a customer was saying                         | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| typically be able to offer relevant information to the questions that customers ask  | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| regularly use full sentences in his/her answers instead of just saying "yes" or "no" | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |

sum: \_\_\_\_\_

mean (sum divided by 5): \_\_\_\_\_

**Demonstrating Empathetic**

|  | <i>strongly<br/>disagree</i> | <i>strongly<br/>agree</i> |
|--|------------------------------|---------------------------|
| try to see the customer's view when discussing points of disagreement        | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| generally seem to find it easy to see things from the customer's perspective | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| be good at "putting him/herself in someone else's shoes"                     | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| think it is important to see the customer's point of view                    | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| put the need of others first   | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |

sum: \_\_\_\_\_

mean (sum divided by 5): \_\_\_\_\_

**Being**

|  | <i>strongly<br/>disagree</i> | <i>strongly<br/>agree</i> |
|--|------------------------------|---------------------------|
| be reliable  | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| keep his/her promises  | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| when the <i>applicant</i> promises to do something by a certain time, he/she will do so  | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| the <i>applicant</i> would do things for others at the time he/she promised to do so     | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |
| if this <i>applicant</i> tells someone that he/she will do something, he/she always does | 1 • 2 • 3 • 4 • 5 • 6 • 7    |                           |

sum: \_\_\_\_\_

mean (sum divided by 5): \_\_\_\_\_



Based on all information available for this applicant,  
I believe that he/she would...

|   |   | <i>strongly<br/>disagree</i>         | <i>strongly<br/>agree</i> |
|---|---|--------------------------------------|---------------------------|
| <b>Using Knowledge To Meet Customer Needs</b> | be very knowledgeable about his/her job                                   | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|   | have the expertise necessary to serve customers                           | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|   | have the knowledge necessary to meet customer needs                       | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|   | know the information related to his/her job well enough to help customers | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|   | be an excellent source of accurate information                            | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|   |   | <i>sum:</i> ____                     |                           |
|   |   | <i>mean (sum divided by 5):</i> ____ |                           |

|                       |  | <i>strongly<br/>disagree</i>         | <i>strongly<br/>agree</i> |
|-----------------------|--|--------------------------------------|---------------------------|
| <b>Being Friendly</b> | I took an instant liking to the <i>applicant</i>               | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|                       | the <i>applicant</i> is cheerful to interact with              | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|                       | I feel that the <i>applicant</i> is a warm and friendly person | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|                       | the <i>applicant</i> is friendly                               | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|                       | the <i>applicant</i> is generally cheerful                     | 1 • 2 • 3 • 4 • 5 • 6 • 7            |                           |
|                       |  | <i>sum:</i> ____                     |                           |
|                       |  | <i>mean (sum divided by 5):</i> ____ |                           |
|                       |  | <i>Overall Mean:</i> ____            |                           |

An overall Relational Competency mean can be computed by averaging the five component means.

*General comments about applicant:*