

## **Service Success Profile Assessment (Mid- to Senior-Level)**

*Individuals in this role are those who have longer experience and a larger scope of responsibility are accountable for adding value to partner relationships and/or external customers; strengthening longer term relationships that contribute to Wells Fargo's success.*

The following Self-Assessment gives you the opportunity to rate yourself on the Service (Mid to Senior) Success Profile. It is meant to give you a snapshot of your current strengths and help you focus on opportunities for improvement.

Complete the following Self-Assessment to conduct a thorough assessment of your strengths and self improvement needs. Rate your perception of how frequently you demonstrate the outstanding behaviors associated with the competencies. For a full description of the behaviors, refer to the Service Success Profile document.

Once you have completed the self-assessment, determine two or three key areas for development based on your self-assessment (You may also use any other feedback you have received from your manager, team members, or from a feedback tool.) Focus on the behaviors that you rated as “occasionally” and “rarely or never.”

If you'd like a more in-depth assessment, talk to your Human Resources Consultant about the value of going through Wells Fargo's INSIGHTS multi-rater assessment process.

Work with your manager and/or your local Learning & Development to put together your development objectives and a plan to support those objectives.

# Service Profile Self-Assessment

<b>Critical Thinking:</b>	<b><i>Rarely or Never</i></b>	<b><i>Occasionally</i></b>	<b><i>Often</i></b>	<b><i>Usually</i></b>	<b><i>Almost Always</i></b>
I implement procedures to prevent or minimize problems that are anticipated from previous experience.					
I maneuver through complex, changing information to clarify problems and determine solutions.					
I develop a big picture perspective based on all relevant information.					
I model systematic, logical thinking for team members.					

<b>Knows the Process:</b>	<b><i>Rarely or Never</i></b>	<b><i>Occasionally</i></b>	<b><i>Often</i></b>	<b><i>Usually</i></b>	<b><i>Almost Always</i></b>
I keep up to date on technology in my area of expertise.					
I generate ideas on how technology can be leveraged to impact business results.					
I have a strong working knowledge of how to get things done in the organization.					
I demonstrate understanding of how systems and processes in my area interface with systems and processes elsewhere in the organization.					
I demonstrate in-depth knowledge of Wells Fargo's products, services and processes inside of my area of expertise.					
I demonstrate broad knowledge of the products and services offered by the competition.					

<b>Leverages Resources:</b>	<b><i>Rarely or Never</i></b>	<b><i>Occasionally</i></b>	<b><i>Often</i></b>	<b><i>Usually</i></b>	<b><i>Almost Always</i></b>
I find innovative ways to achieve results with limited resources.					
I promote the use of appropriate technology (e.g., email, video, conferencing) to effectively communicate with people across the organization.					
I share my knowledge and expertise with team members.					
I pull together a team of people with the skills and experience needed to solve a customer's problem.					
I model the use of technology for effective job performance.					

# Service Profile Self-Assessment

<b>Relationship Savvy:</b>	<b><i>Rarely or Never</i></b>	<b><i>Occasionally</i></b>	<b><i>Often</i></b>	<b><i>Usually</i></b>	<b><i>Almost Always</i></b>
I seek ideas from customers and team members in order to build understanding and collaboration.					
I demonstrate interest in other people and their goals, projects and concerns.					
I maintain positive working relationships with customers, even through challenging situations.					
I show sensitivity to concerns and challenges faced by others.					
I recognize team members across the organization for their efforts, knowledge and results.					
I develop and maintain good working relationships across the organization, to create a network for the customer.					

<b>Adaptability:</b>	<b><i>Rarely or Never</i></b>	<b><i>Occasionally</i></b>	<b><i>Often</i></b>	<b><i>Usually</i></b>	<b><i>Almost Always</i></b>
I actively promote change initiatives.					
I start fresh with each interaction without carrying forward emotional reactions from one situation to the next.					
I adjust my style of working and communicating to accommodate the preferences of others.					
I effectively manage multiple tasks and issues, concurrently.					
I maintain a positive, professional demeanor when dealing with stressful situations and difficult people.					
I ask others for frank, constructive feedback to help improve my effectiveness.					
I modify my behavior in response to feedback.					

<b>Capitalizes on Opportunities:</b>	<b><i>Rarely or Never</i></b>	<b><i>Occasionally</i></b>	<b><i>Often</i></b>	<b><i>Usually</i></b>	<b><i>Almost Always</i></b>
I ask questions to discover the customer's present and future financial goals.					
I recognize when the customer's behavior (both verbal and non-verbal) indicates openness to taking the next step toward a sale.					
I create and implement innovative solutions to address opportunities recognized in a customer situation.					
I sell additional products and services to the customer.					

# Service Profile Self-Assessment

<b>Tenacity:</b>	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I help the customer find a solution within another line of business, when appropriate.					
I study data to identify emerging patterns and trends that reveal the root cause of a problem.					
I take repeated or multiple actions to overcome an obstacle or solve a problem.					
I take initiative to increase my own knowledge and skill in order to serve customers more effectively.					
I demonstrate sustained effort over time to solve problems and accomplish objectives.					

<b>Leads with Integrity:</b>	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I consistently model behaviors that exemplify Wells Fargo values and serve the best interests of Wells Fargo.					
I follow through on commitments to others.					
I am honest and forthright with people.					
I demonstrate respect to others at all levels in the organization.					
I step forward to address ethical issues.					
I avoid any conflict of interest or the appearance of a conflict of interest.					
I accept responsibility for mistakes.					

<b>Customer Focus:</b>	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I convey to customers that meeting their needs is a high priority.					
I ask questions to determine what the customer values.					
I present Wells Fargo as one company and team to our customers and markets.					
I drive the use of research for continuous improvement.					
I solicit and use customer feedback.					
I prepare service solutions that clearly address the customer's needs and preferences.					
I consistently exceed customer expectations in terms of quality of services delivered.					

# Service Profile Self-Assessment

<b>Takes Accountability:</b>	<b><i>Rarely or Never</i></b>	<b><i>Occasionally</i></b>	<b><i>Often</i></b>	<b><i>Usually</i></b>	<b><i>Almost Always</i></b>
I maintain a commitment to goals in the face of obstacles and frustrations.					
I produce high quality work.					
I deliver results on time.					
I demonstrate a strong sense of responsibility about resolving problems, completing work and achieving goals.					
I accept ultimate responsibility for the quality of the customer experience.					
I take ownership of issues and see them through to resolution.					

<b>Diversity:</b>	<b><i>Rarely or Never</i></b>	<b><i>Occasionally</i></b>	<b><i>Often</i></b>	<b><i>Usually</i></b>	<b><i>Almost Always</i></b>
I model respect for differences through words and actions.					
I actively try to understand the diversity of our customers, team members and communities.					
I seek different perspectives when creating solutions.					
I listen and give serious consideration to perspectives that are different from my own.					
I articulate the power of leveraging diversity for a competitive advantage.					

# Personal Learning Journal

As you are working on your development plans, you may find it useful to keep notes on what you are learning. This Personal Learning Journal template is one possible format for your thoughts and ideas.

Date:

Decision/topic/accomplishment:

What happened?

What worked well?

What didn't work well?

What would you do differently next time?

What did you learn about yourself?