

Successful De-Escalation:

Customer Service Training

Participant Materials

2024

Intro

Successful De-Escalation:

Customer Service Training Program

Welcome! This training program is designed for ETF staff who work directly with customers as part of their job role or function. The intent is to bring staff together from different areas of the agency to learn from each other and professionally develop their customer service skills.

This program is intentionally structured to provide both knowledge and skills to help ETF staff effectively de-escalate upset customers. This is a blended learning solution that includes both online pre-work and a live training session with co-facilitators. Participants will refine skills in the areas of emotional intelligence, deflecting verbal attacks, syncing their voice tone with their words, and self-care tips to better manage well-being.

Overall, this program establishes a foundation for customer service skills to better equip staff for successful de-escalation management and resolution.

We're glad you're here!

Training Program Goal

Consistently apply service strategies to customer interactions to skillfully de-escalate upset customers and provide quality experiences.

Training Program Objectives

As we all know, serving and working with upset customers can be challenging and taxing. This program will equip you with new techniques, so that you'll be able to:

1. Defuse high emotion in upset customers by applying Emotional Intelligence (EQ) strategies and respectful communication.
2. Deflect verbal attacks from angry customers with re-directing statements.
3. Match your tone of voice to the words you use to sync your communication more powerfully.
4. Apply self-care techniques to better manage your own well-being and resilience after difficult customer interactions.

ETF Vision

We will be a leader among public employee benefit systems by focusing on the well-being of our members through financial stewardship, high-quality and valued services, innovative solutions, and customer engagement.

ETF Mission

To develop and deliver quality benefits and services to our customers while safeguarding the integrity of the Trust.

Agency Values

INTEGRITY

RESPECT

QUALITY

PEOPLE

Strategic Goals

Goal 1: Create an Effortless Customer Experience.

Goal 2: Implement outcomes-driven Performance Measurement and Process Management.

Goal 3: Build a Talented and Agile Workforce.

Goal 4: Implement modern, secure, and resilient information technologies.

Customer Experience (CX) Vision

CXVision

Our customers feel empowered and trust us to meet their needs through personalized, convenient and helpful interactions.

Customer De-Escalation Guide: HEAL Steps

When working with customers, reference this checklist as a reminder for how to de-escalate.

H in HEAL:

✓	Hear out the Customer
	Allow them to vent without interrupting them.
	Give yourself permission to sidestep their trigger words like arrows passing you by.
	Wait for them to take a breath before you interject.

E in HEAL:

✓	Ease the Tension
	Use the Pairing Statement (Apology Statement + Empathy Statement together)
	The louder, faster, & angrier they get, the softer, slower, & calmer you should get.
	Paraphrase back what they said to check for clarification.

A in HEAL:

✓	Act to Improve the Situation
	Use Re-directing action statements like "Let's see how we can get that corrected."
	"Talk your Task" – explain what you are doing when you look onscreen, so they are not left in silence to wonder if the connection is still working and you're there.
	Propose solutions about what we CAN do, not what we cannot do.
	If you need to do research, call back promptly, and keep your word on return calls.

L in HEAL:

✓	Leave a Positive Impression
	Summarize the issue and recap the steps you'll take to resolve it.
	Find something to thank the customer for at the end (patience, time, etc.).
	When they thank you, respond with "you're very welcome," "you're welcome," etc.

Examples of Pairing Statements

Pairing Statement = Apology + Empathy Statement together

Hearing someone take ownership by apologizing can greatly help to de-escalate an upset customer. Then pairing the apology together with an empathy statement is even more powerful. To be empathic, you are sharing the feelings someone else is feeling and can understand what they must be thinking if you were in their shoes and the same situation happened to you. Empathy communicates that you hear them, you're validating their feelings, and it fosters acceptance--not resistance--placing both of you "on the same team" to work together toward finding solutions.

"Our apologies for the payment delay. That must have been very frustrating."

"We apologize for the inconvenience. I can see why you're upset."

"I'm sorry you experienced that. I can appreciate how confusing this can be."

"I'm truly sorry to hear that. This would frustrate me too."

"We take full responsibility. I would be asking the same questions you are."

"Please accept our sincere apology. I realize how upsetting this must be."

"Sorry you're pressed for time. I can see how inconvenient this has been for you."

"Our apologies about the missed payment. We want to understand what happened as much as you do."

"So sorry to hear. Yes, that would be very disappointing."

Phrasing Language Professionally

What we say and how we say things makes a world of difference to customers. To keep our conversations professional, courteous, and pleasant, do your best to steer away from the phrases on the left and work to use the recommended replacements in the right column.

Instead of . . .	Better to replace with . . .
"But . . ."	"Yes, and . . ."
"Hold on one moment. I'll be back."	*Always ask their permission before placing on hold:* "May I place you on a brief hold while I check into that, (insert Name)?"
"Wait one moment" (they don't know what their waiting for & it's a command)	"Would you please hold for a moment while I research that for you, (insert Name)?"
"Unfortunately," "we can't," "Don't," "no," or "won't" – "We won't be able to change that unless your employer does." "There's no way we can get it to you today."	"What we can do is . . ." "Once your employer notifies us of the change, we can make that change for you in the system." "We can get that to you by the end of the week"
Absolutes: "we can never" "you always"	"Often we" "Sometimes" "Usually"
Criticism/Lecturing/Judgment	Use respectful and compassionate commun. For example, if they share their brother-in-law just passed away, genuinely express and say you are very sorry for their loss.
Accusatory "you" statements – "You didn't put anything on your application that marked your spouse" "You were late with your form"	"The application does not show a spouse." "We would need your form by X date to process it on time."
After customer thanks you," avoid casual and informal replies like: ▪ "No Worries" ▪ "Of course," or "Course!" ▪ "You Bet" ▪ "Totally" ▪ "For Sure" ▪ "No Problem" (implies was a problem) ▪ "Gotcha"	After employee thanks you at the end of the interaction, close with professional language: ✓ "You're very welcome." ✓ "You're welcome" ✓ "Our pleasure" ✓ "My pleasure" ✓ "Pleasure serving you"

Successful De-Escalation: Customer Service Trng.

Scenario A: "ETF Wronged Me!"

***Instructions**: (2 min)*

Divide into pairs. One of you will role-play an ETF Customer Service Specialist. The other partner will play the upset customer.

Begin by reviewing the scenario below. This is based on real calls from customers. First, each person should independently think through what they might say. Feel free to write down or type potential phrases to prepare for where the conversation may go.

Once you're both ready, role-play this scenario out loud with your partner.

***Scenario**: (Role-play 4 min)*

This is a Call Center scenario. The customer calls ETF and is very upset because they received a letter from ETF saying their annuity was decreasing by $25/month starting next month.

After researching this further, the specialist discovers it is because their employer reported a change in their earnings which caused the adjustment to their annuity. Their employer had incorrectly reported that their earnings were $65,000, not the actual $70,000.

***Reflection:** (4 min)*

The person who played the upset customer provides the feedback:

1. Was the CS Specialist able to successfully de-escalate the situation? If so, how?
2. What was your customer experience?
3. How did it feel when they allowed you to vent? Used the pairing statement with an apology + empathy statement? Re-directed you to focus on solutions? Closed with a positive impression?
4. Where could they improve?

Prep Sheet for ETF Customer Service Specialist Role
Scenario A

To apply what you've learned to this skill practice, always maintain professional courtesy, use the H.E.A.L. steps in your responses, and begin with the phrase below:

(smile) ***"Good morning! Thank you for calling the Department of Employee Trust Funds. My name is XXX… May I have your name please? (Their Name), how may I help you*?"**

- You discover their employer reported a change in their earnings which caused the annuity adjustment. Their employer incorrectly reported earnings of $65,000.
- Explain ETF is required to use what employers report.
- To resolve this, politely communicate the customer should call their employer to discuss the error and then report back to ETF.

H - Hear out the Customer

(Let them vent. Do not interrupt. Attentively listen. Imagine yourself side-stepping any attacking words—let the arrow shoot past you--so you are not defensive. How would you feel as customer? Be empathic. Wait for them to take a breath before you interject.)

E – Ease the Tension

(De-escalate with a Pairing Statement which is an apology statement + empathy statement, e.g., "Our apologies for the delay. That must have been very frustrating." Paraphrase back your understanding to check for clarification, "I hear you saying that…")

A – Act to Improve the Situation

(Use re-directing statements to lead toward resolution. For example, "Let's see how we can get that corrected," and "Let's see what we can do to resolve this for you." Communicate you're on the same team with words like "we" "us" "let's." Propose solution(s). Phrase as what we CAN do, not what we are unable to do or cannot do. Talk your task aloud instead of long silence, "I'm checking the system.")

L – Leave a Positive Impression

(Summarize the issue, recap steps to solve it, and find something to thank them for at the end. For example, thank them for their patience even if they weren't. Ask "what else can I help you with?" If they thank you, respond professionally with "you're very welcome," "you're welcome," "Our pleasure," etc. Close positively with something like "Have a great rest of the day. Appreciate you holding for a brief survey. Goodbye.")

Prep Sheet for <u>Customer Service Specialist</u> Role

Scenario A

Notes Prep:

Prep Sheet for Upset Customer Role

Scenario A

Be angry when you begin. Begin by saying something like the following:

Member (upset): ***"I received a letter from you guys saying my annuity was decreasing by $25.00 per month starting next month! That isn't right! Why are you doing this to me*!?!"**

- Be demanding, loud, talk fast, etc. because you're upset.
- You believe the ETF letter that said your annuity will decrease is "unfair and wrong."
- Begrudgingly give a name and ID number when asked.
- Emphasize you can't believe this is happening to you. ETF can't just take your money away because it's your money.
- You might also say trigger phrases like, "you're no help at all."
- When the specialist later discovers your employer inaccurately reported their earnings, demand ETF fix it.
- You don't understand what you are supposed to do if your employer was the one who made the mistake. You're confused about what to do.

If the specialist stays calm and addresses your needs with professional courtesy:

- Allow yourself to eventually calm down if you feel your needs are being met.
- And if you are pleased with the resolution and understand what the next steps are, you can also calm down to have a more productive discussion.

Notes Prep:

Successful De-Escalation: Customer Service Trng.

Scenario B: “I Want It Now!”

***Instructions**: (2 min)*

Switch roles from the last scenario. The partner who played the upset customer in Scenario A will now be the Customer Service Specialist in Scenario B and vice versa.

Begin by reviewing the scenario below. This is based on real calls from customers. Again, each person should first independently think through what they might say. Feel free to write down or type potential phrases to prepare for where the conversation may go.

Once you’re both ready, role-play this scenario out loud with your partner.

***Scenario**: (Role-play 4 min)*

The customer calls ETF and is very upset because they’ve received a letter from ETF multiple times. More importantly, they still have not received their benefit. After researching this further, the Customer Service Specialist discovers ETF sent the letter because the customer selected two options on their retirement application. But then when the customer completed the form, they (and their spouse) did not sign it.

***Reflection:** (4 min)*

The person who played the upset customer provides the feedback:

1. Was the CS Specialist able to successfully de-escalate the situation? If so, how?
2. What was your customer experience?
3. How did it feel when they allowed you to vent? Used the pairing statement with an apology + empathy statement? Re-directed you to focus on solutions? Closed with a positive impression?
4. Where could they improve?

Prep Sheet for ETF Customer Service Specialist Role

Scenario B

To apply what you've learned to this skill practice, always maintain professional courtesy, use the H.E.A.L. steps in your responses, and begin with the phrase below:

(smile) ***"Good morning! Thank you for calling the Department of Employee Trust Funds. My name is XXX… May I have your name please? (Their Name), how may I help you?"***

- You discover ETF sent the letter because the customer selected two options on their retirement application. But then when the customer completed the form, they (and their spouse) did not sign it.
- To resolve, request they send the completed form with signature today so they can be on the next payroll without missing a payment.
- Politely explain that ETF is happy to pay the benefit once the form is completed in full with the documented signature.

H - Hear out the Customer

(Let them vent. Do not interrupt. Attentively listen. Imagine yourself side-stepping any attacking words—let the arrow shoot past you--so you are not defensive. How would you feel as customer? Be empathic. Wait for them to take a breath before you interject.)

E – Ease the Tension

(De-escalate with a Pairing Statement which is an apology statement + empathy statement, e.g., "Our apologies for the delay. That must have been very frustrating." Paraphrase back your understanding to check for clarification, "I hear you saying that…")

A – Act to Improve the Situation

(Use re-directing statements to lead toward resolution. For example, "Let's see how we can get that corrected," and "Let's see what we can do to resolve this for you." Communicate you're on the same team with words like "we" "us" "let's." Propose solution(s). Phrase as what we CAN do, not what we are unable to do or cannot do. Talk your task aloud instead of long silence, "I'm checking the system.")

L – Leave a Positive Impression

(Summarize the issue, recap steps to solve it, and find something to thank them for at the end. For example, thank them for their patience even if they weren't. Ask "what else can I help you with?" If they thank you, respond professionally with "you're very welcome," "you're welcome," "Our pleasure," etc. Close positively with something like "Have a great rest of the day. Appreciate you holding for a brief survey. Goodbye.")

Prep Sheet for ETF Customer Service Specialist Role

Scenario B

Notes Prep:

Prep Sheet for Upset Customer Role
Scenario B

Be very upset at the beginning. Start by saying something like the following:

Member (angry): **"Alright, so I'm calling because this is the third time—yes, third time—you've sent me a stupid letter! Look, all I want is my benefit. Where is it? I still don't have it!"**

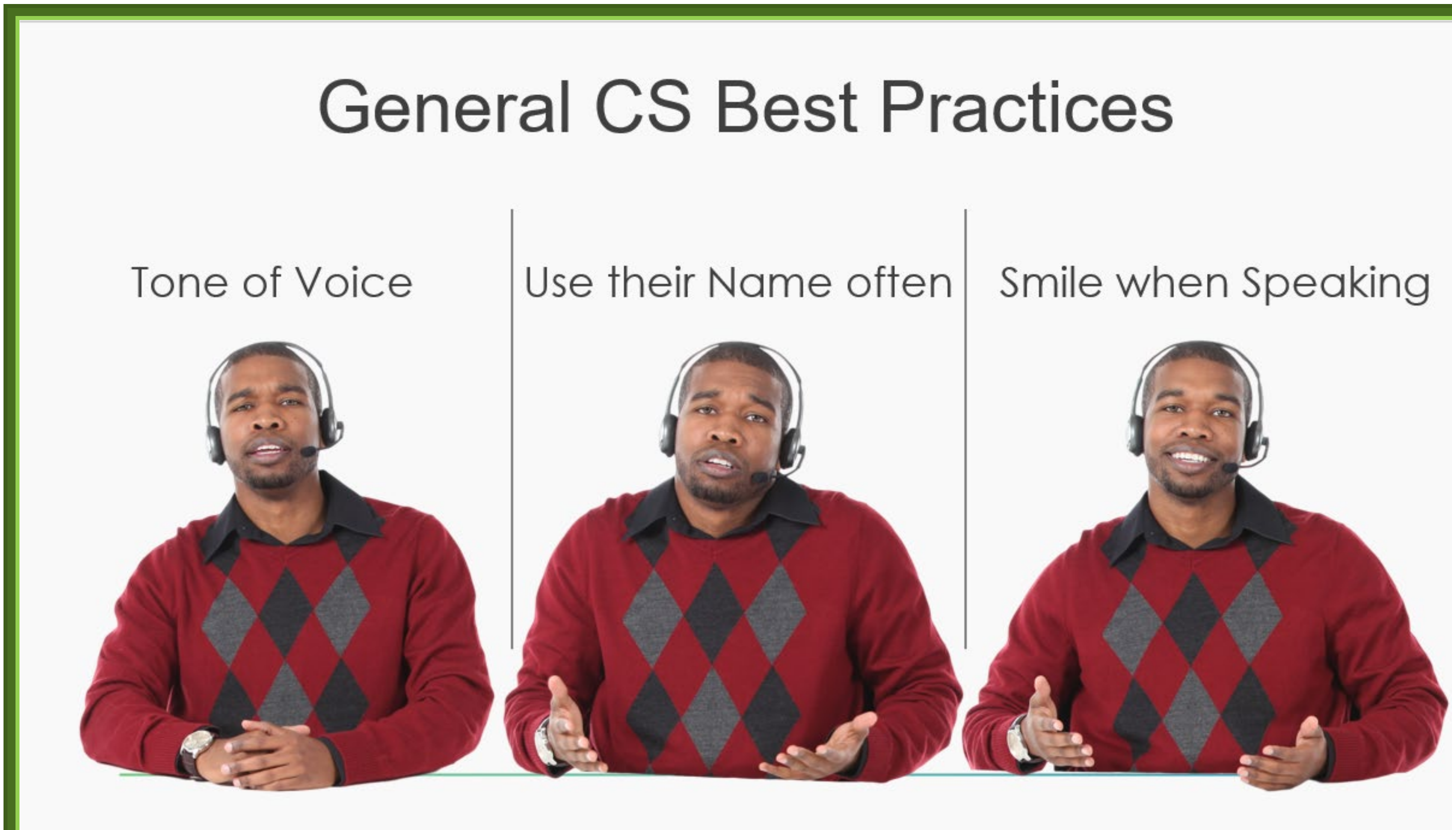
- You are very angry because you still haven't received your benefit.
- Begrudgingly give a name and ID number when asked.
- Insist repeatedly that you just want your benefit!

- When the specialist later discovers you did not sign the application, you don't understand why this is necessary because you already completed the form. You might say something like, "You know what, I didn't know I had to complete the whole thing. Just pay me what you owe me!"
- You might say some trigger phrases like, "Boy, you're no help at all."
- You cannot afford to miss payments with all these delays.

If the specialist stays calm and addresses your needs with professional courtesy:

- Allow yourself to eventually calm down if you feel your needs are being met.
- And if you are pleased with the resolution and understand what the next steps are, you can also calm down to have a more productive discussion.

Notes Prep:



5 Tips for Self-Care

Taking care of yourself when you work in customer service is job #1. Find some time to unwind between calls, even if it’s just for a few minutes. Below are five key suggestions for self-care when you work as a customer service specialist.

Stand during the Difficult Conversation

To help alleviate stress and allow you some space to move your body, feel free to stand during a difficult customer interaction. When you’re allowed to take a few steps, change your seated position, and stretch, it can do a world of wonders to not take the messages from the upset customer personally.

Deep Breathing Sets

Sets of deep breathing are the quickest and easiest way to help calm yourself down after a difficult customer interaction. The great news is that it can be done from anywhere. If you need to engage in deep breathing while on a call, be sure to mute your line first. The key principle is that your body knows that everything is OK if your breathing is slow. Do deep breathing sets by inhaling to a count of 4 followed by a long exhale to a count of 6 to help calm your system and begin to relax. Repeat with three sets of inhales and exhales.

3 Take a Break with Physical Movement like a Walk

Ideally, you are on call with just a few minutes between interactions. However, after very challenging interactions with customers, your well-being is a priority. By placing your phone on not available, take the time to walk around your home when working remote. Even light cardio exercise will help burn off stress hormones like adrenalin and cortisol. Take a break to unwind, reset, and renew.

4 Journal your Feelings and Emotions

What you don’t release, you carry. Typing, writing, or journaling your feelings are a way to release them so you can move forward without carrying them. Afterwards, you can always delete, shred, or throw away what you’ve written which can also be therapeutic. The point is that you get out how you’re feeling, express them to get them off your chest, and then it can help you let them go. It’s helpful to have a venue for venting privately this way.

5 Vent to a Trusted Confidante

One of the rules of good customer service is the ability to not carry emotions from your last customer interaction into the next customer interaction. Again, keep in mind though that what you don’t release, you carry internally. Venting to a trusted confidante who might be a trustworthy colleague or family member is a way to let off steam and release your emotional energy after working with a difficult customer. Make sure other listening ears are not present and that your confidante will not share the information with others. Do not use MS Teams to vent. As you continue to grow and develop professionally as a customer service specialist, consider the value of venting to let off steam and unload with others what you are carrying or what is bothering or troubling you about a customer interaction.

Customer Service Training
ACTION PLAN

Instructions: Take time now to reflect on this training and respond to each question below. After this training, have a discussion with your Supervisor about your Action Plan below and share what you will start applying, continue doing, and stop doing going forward to best service ETF customers.

1. What will you *BEGIN* doing?

2. What will you *KEEP* doing?

3. What will you *STOP* doing?

NOTES