

De-escalation Shadow Observation Worksheet

To ensure we Earn the Right to continue to call them Our Customers.

SWAT Agent		Date	/	/	Store #	
Mentor		Mentor Notes:				
Reason for Call						

Customer Scenario	
Type 1: Customer wants to speak to someone that's in charge, such as a manager.	<input type="checkbox"/>
Type 2: Customer who is very upset, emotionally charged, and difficult to have a manageable conversation with.	<input type="checkbox"/>
Other:	<input type="checkbox"/>

Part 1: Listening	Yes	No
Emotional Level Cited the customer's emotional level. Was it high, medium, or low?	<input type="checkbox"/>	<input type="checkbox"/>
Problem Details Cited some of the details of the problem the customer was calling about, including: • Who they spoke with or interacted with? • What happened? • How something happened that didn't meet their expectation? • When something happened that didn't meet their expectation? Also, noted any details that helped label the problem while speaking with the customer.	<input type="checkbox"/>	<input type="checkbox"/>
Sequence of Events Cited the steps and reasons that led the customer to calling, including any sequence of events, and/or steps that were important to the customer.	<input type="checkbox"/>	<input type="checkbox"/>
Solutions Cited any solutions the customer was looking for or noted the expectation the customer had in the result of why they called.	<input type="checkbox"/>	<input type="checkbox"/>

Part 2: Speaking	Yes	No
Extend Empathy Spoke with kindness. Let the customer know they were not alone. Let the customer know they were grateful they shared their issue with them.	<input type="checkbox"/>	<input type="checkbox"/>
Label the Problem Addressed the issue specifically.	<input type="checkbox"/>	<input type="checkbox"/>
Offer Solutions as a Trusted Expert Focused on the solution, not the problem. Had integrity, spoke fairly, and did what they believed was right.	<input type="checkbox"/>	<input type="checkbox"/>
Speak With a Can-do Attitude Demonstrated listening and understanding. Repeated what the customer described. Spoke with clarity, confidence, and a Can-do Attitude.	<input type="checkbox"/>	<input type="checkbox"/>

Part 3: Priming Words	Yes	No
Positive Priming Words Used phrases that were met with a positive reaction from the customer, such as: • “As a solution, I will....” • “What I will do right now is....” • “For the quickest resolution, I suggest....” • “As an immediate solution,...., then I suggest....”	<input type="checkbox"/>	<input type="checkbox"/>
The Four Basic Steps		
1. Identified negative or defensive statements	<input type="checkbox"/>	<input type="checkbox"/>
2. Identified what they wanted the customer to do	<input type="checkbox"/>	<input type="checkbox"/>
3. Restated their approach to guide the customer to their outcome	<input type="checkbox"/>	<input type="checkbox"/>
4. Appropriate use of personal pronouns (I, You, Your, We, Us)	<input type="checkbox"/>	<input type="checkbox"/>

The 4R Method	Yes	No	N/A
Recognize Expressed complete understanding of the customer concerns and displayed genuine empathy for their situation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appropriately used statements such as “I understand,” “I can see your point,” or “I can appreciate that,” for example.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reframe Reframed the conversation to center the focus on the issue at hand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appropriately used statements such as “Now let’s see what we can do to fix this.” Provided reassurance of the intent to get this matter resolved to the customer’s satisfaction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redirect If reframing was not successful, utilized what is referred to as a “tactical assertive takeover.” Jumped in when the customer paused by saying, for example, “Let’s get started getting this taken care of.” But NEVER INTERRUPTED.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If the customer continued to vent, waited for a pause and reengaged.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redirected the customer away from their emotional response and engaged them with a plan for resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Used either redirecting with options or three closed-ended questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redirect with Options Was prepared with more than one option.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Used options to make the customer feel like they were in control.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Showed control of the outcome.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Used positive responses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never explained what they can’t do but focused on what they can do.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redirect with Three Closed-Ended Questions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Moved the customer's focus over to an analytical conversation.			
Asked three closed-ended questions. For example, "What is your order number," "Is this your email address?" and "Is the phone number you're calling from the same one associated with your order?"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redirected the customer's attention away from the emotional aspects of the situation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engaged the customer's analytical conversation making it manageable and productive.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolve Reviewed the solution with the customer to make sure they were satisfied with the outcome and had clear expectations of next steps.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<i>Call Resolution</i>	Yes	No
Did the call require escalation?	<input type="checkbox"/>	<input type="checkbox"/>

<i>Ending the Call</i>	Yes	No
Made sure they answered all the customer's questions.	<input type="checkbox"/>	<input type="checkbox"/>
Invited the customer to the store or created an appointment.	<input type="checkbox"/>	<input type="checkbox"/>
Gave the specific store location, store contact the customer should ask for, and when we expect them to go into the store.	<input type="checkbox"/>	<input type="checkbox"/>
Restated their name to the customer.	<input type="checkbox"/>	<input type="checkbox"/>
Let the customer know what to expect when they arrive at the store.	<input type="checkbox"/>	<input type="checkbox"/>
Thanked the customer by name for calling and giving us the opportunity to earn their business.	<input type="checkbox"/>	<input type="checkbox"/>
Sent Thank you email with survey to collect feedback and cement ownership with the customer.	<input type="checkbox"/>	<input type="checkbox"/>