

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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> “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"/>
<u>Redirect with Options</u> 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"/>
<u>Redirect with Three Closed-Ended Questions</u>	<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"/>

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

Ending the Call	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"/>