

Participant Guide – De-escalation Part 2 (ILT)

Training Overview:	INTRODUCTION
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Welcome to De-escalation Part 2 (ILT).

In this ILT, you will learn how to apply the knowledge you learned from the De-escalation Part 1 eLearning.

Your responsibilities as a learner include:

- Having a positive attitude and participate in all activities.
- Being prepared to share your experience from difficult calls.
- Giving your best during this instructor-led training.

This course concludes with an eLearning post assessment and an observation allowing you to demonstrate your ability to use the de-escalation skills from the eLearning and the ILT.

Training Overview:	COURSE PRE-REQUISITES
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Learners must have completed the De-escalation Part 1 (eLearning) prior to taking this course.

Training Overview:	BEFORE TRAINING
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- Review this Participant Guide.
- Familiarize yourself with the Legend and icons used in this guide.
- Download and open the *Call Shadow Observation Worksheet – De-escalation Strategy and Techniques*.
- Remember calls you have had over the last few days and weeks as preparation for sharing.

The **Legend** below defines the icons used throughout this guide.

Legend

	Focus Point	Key aspect(s) of the topic that need to be communicated to meet objectives.		Tip	A suggestion for success for the topic. This can include questions.		Warning	Something to avoid.
	Segue	The title of the next slide.		Time	Recommended time for delivery of the topic.		Instructions	Activity-specific directions.
	Document/Handout	External document(s) related to the topic.		Video	External video(s) related to the topic.		Web Link	External URL websites address(es) related to the topic.

Training Overview:	COURSE STRUCTURE
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Section Name	Slides
1 Welcome and Objectives	1-2
2 Strategic Intent and Customer Complaints	3-4
3 Activity	5-10
4 Summary and Review	11-12

Section 1:	Welcome and Objectives	Slides:	1-2		
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De-escalation

ILT Training

Customer Scenarios

January 2023

Learning and Development

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Welcome to this course!

Be sure that you have your observation worksheet open and available.



*Shadow Call Observation Worksheet
– De-escalation Strategy and Techniques*

[Participant Notes]

TRAINING OBJECTIVES

Click to add text

- Appraise the two reasons a customer wants to speak to your manager
- Discuss information you can cite using the Take Notes technique
- Relate techniques used when speaking with a customer
- Contrast the differences between positive priming words and negative priming words
- Paraphrase the R's in the 4R method
- Discuss and share stories connecting the hearts and minds of the learners to the strategy of this training



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These objectives are based on higher order thinking.

Your learner responsibilities:

- Engage your learning with focused thought
- Share and talk with each other
- Discuss connections to knowledge
- Look at the first word of each objective – these words that encourage talking



The focus of this ILT is to build on the knowledge and concepts from the De-escalation eLearning course.

[Participant Notes]

Section 2	Strategic Intent and Customer Complaints	Slides:	3-4		
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STRATEGIC INTENT

Connecting our Hearts with our Minds

- Goal - Brand Promise Delivered to every customer
- Caring - Listening to understand
- Empathy - Seeing the situation through the customers eyes
- Can Do Attitude - Provide Solutions
- Doing the Right Thing - Resolution

*When we deliver on
our Brand Promise*

*we “Earn” loyal
Customers for Life!*



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Connecting with your hearts and minds as you deliver on our Brand Promise, you can more effectively earn loyal customers for life.



In order for engagement to be genuine/effective, it must come from the heart.

Focus on earning loyal customers for life.

[Participant Notes]

CUSTOMER COMPLAINTS

Click to add text

Why should we focus so much attention on customer complaints?

The Facts

1. Only 1 out of 27 customers that have a bad experience reach out for help
2. Customers that have a bad experience share that with an average of 11 other people
3. Customers that make contact with us, but do not get their concerns resolved, share that with an average of 24 other people
4. Customers that reach out and have a great experience with us resolving their concerns share that experience with an average of 17 other people
5. Customer retention directly impacts our company's bottom line net revenue by building loyalty, creating repeat business (increased sales), reducing acquisition expense, and generating positive word of mouth



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Customer retention directly impacts our bottom-line net revenue.

- Customer complaints inform us of what we need to be doing better for Our Customers.
- This list of facts should drive home our motivation for earning customer loyalty and an opportunity to always strive for Delighting Our Customers.



What is the cost when we lose loyalty?

[Participant Notes]

Section 3:	Activity	Slides:	5-10		
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ACTIVITY OVERVIEW AND PARTICIPATION

Activity Directions

- Small Group Discussion and Share Out

Activity Time

- You will have 8 minutes for each activity.
- Take 4 minutes to discuss.
- Take 4 minutes to share out as a group



The next section consists of five Paired Small Group Discussions.

Your Participant Guide will provide space to write one insight you had and one insight your partner had while you have your Paired Group Discussions.

Be prepared at the end of your discussion time to share out one of these insights with the group.

Write one insight you had:

Write one insight your partner had:

[Participant Notes]

SMALL GROUP DISCUSSION

Concepts:

- The two reasons a customer wants to speak to someone in charge:
 - Fear and Trust

Scenario Activity:

- Recall a time when you were upset and had to contact customer service by phone.
- Question: What were the expectations you had before you spoke with an agent?
- Question: How does this perspective help us as Agents to see our calls through the customer's eyes?



Group Sharing Directions:

- 4 minutes to discuss.
- 4 minutes to share out as a group.

 This activity applies to the objective:
"Appraise the two reasons a customer wants to speak to your manager."

 Write a phrase you heard that you might use in your calls.

Write one insight you had:

Write one insight your partner had:

[Participant Notes]

SMALL GROUP DISCUSSION

Concepts:

- Solution Part 1: Listening for understanding
 - Emotional Level
 - Problem Details
 - Sequence of Events
 - Solutions

Scenario Activity:

- Recall a time when you were talking with customer service by phone and telling them the details of what upset you and why you called.
- Question: What were the expectations you had while talking to an agent about the details that upset you?
- Question: How does this perspective help us as Agents to see what we should listen for and take detailed notes about?

**Group Sharing Directions:**

- 4 minutes to discuss.
- 4 minutes to share out as a group.



This activity applies to the objective:
"Discuss information you can site using the
Take Notes technique."



Understanding this Listening solution
prepares you to implement Solution 2 -
Speaking.

Write one insight you had:

Write one insight your partner had:

[Participant Notes]

SMALL GROUP DISCUSSION

Concepts:

- Solution Part 2: Speaking
 - Extend Empathy
 - Label the Problem
 - Solutions as a Trusted Expert
 - Speak with a Can-Do Attitude - Clearly and Confidently

Scenario Activity:

- Recall a time when you were talking with customer service by phone and you felt heard by the agent and trusted them.
- Question: What were the feelings you had while the agent had empathy for you and presented a solution?
- Question: How does this perspective help us as Agents to see what techniques we should be using when we speak?

**Group Sharing Directions:**

- 4 minutes to discuss.
- 4 minutes to share out as a group.



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This activity applies to the objective:
"Relate techniques used when speaking with a customer."

Think about this question:

"When we're speaking, are we using all of these techniques successfully?"



Understanding this Speaking solution prepares you to take a deeper look at what we should and should not say to set up for the WIN.

Write one insight you had:

Write one insight your partner had:

[Participant Notes]

SMALL GROUP DISCUSSION

Concepts:

- Solution Part 3: Priming Words
 - Negative Priming Words
 - Positive Priming Words
 - Application Example: “Because” statement

Scenario Activity:

- Recall a time when you were talking with customer service by phone and you felt the conversation had positive and negative moments based on the words you heard.
- Question: What were the feelings or confidence you had in the agent when they were talking with you or shared why the outcome was not what you wanted, and the reason they had for this?
- Question: How does this perspective help us as Agents to see how our words affect our customers and the power of using a “Because” statement?



Group Sharing Directions:

- 4 minutes to discuss.
- 4 minutes to share out as a group.



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This activity applies to the objective:

“Contrast the differences between positive priming words and negative priming words.”

Think about these questions:

- “Are the phrases we’ve been using in contrast to our call goals?”
- “When we’re speaking, are we using all of these techniques successfully?”
- “What “Because” statement are you using when communicating bad news?”



This solution completes the Type 1 Customer scenario and now prepares you for implementing all of these solutions together through-out your call.

Write one insight you had:

Write one insight your partner had:

[Participant Notes]

SMALL GROUP DISCUSSION

Concepts:

- The 4R Method
 - Recognize
 - Reframe
 - Redirect
 - Resolve

Scenario Activity:

- Recall a time when you were in a similar situation as the scenario presented by your trainer.
- Question: What were the feelings or temperature you had with a phone agent when you were very upset or emotionally charged?
- Question: How does this perspective help us as Agents to see how we can work through emotionally difficult conversations and find a path to resolution?

**Group Sharing Directions:**

- 4 minutes to discuss.
- 4 minutes to share out as a group.



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Redirect includes R- with options and R- with 3 closed-ended questions.

Reviewing notes with the customer can be used to accomplish 3 closed-ended questions during Redirect.

Think about this question:

“How are you personalizing this method for your understanding to apply it?”



★ Write a phrase you heard that you might use in your calls.

Write one insight you had:

Write one insight your partner had:

[Participant Notes]

Section 4:	Summary and Review	Slides:	11-12		
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STRATEGY AND TRAINING OBJECTIVES SUMMARY

- Connecting our Hearts with our Minds
 - Goal - Brand Promise Delivered to every customer
- Appraise the two reasons a customer wants to speak to your manager
- Discuss information you can cite using the Take Notes technique
- Relate techniques used when speaking with a customer
- Contrast the differences between positive priming words and negative priming words
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These objectives are based on higher order thinking. Remember, we asked you today to engage your learning with focused thought, sharing, talking with each other, and making connections to knowledge through the time together.



Did your learning experience today accomplish all of these objectives? If not, what did we miss?

[Participant Notes]

THANK YOU FOR ATTENDING

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WE DO THIS TOGETHER



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Our culture continues to be our strength;
and remember...we do this together!



Thank you for your engagement today
and investment in your learning.

[Participant Notes]

Training Completion:**POST TRAINING RESPONSIBILITIES**

POST ASSESSMENT

Log into the LMS and complete the Post Assessment exam.

COACHING AND PRACTICE

Now it's time to practice these skills.

With your Coach:

- Use the *De-escalation Shadow Observation Worksheet* to listen and evaluate your calls.
- Reverse roles. Listen to your coach and evaluate them using the *De-escalation Shadow Observation Worksheet*.

DE-ESCALATION SHADOW OBSERVATION

Once you and your coach are confident in performing the skills learned from this training:

- Login to the LMS and request the De-escalation Shadow Observation.
- Once a successful observation is complete, you will be marked as complete in the LMS.