

## Trainer Guide – De-escalation Part 2 (ILT)

Est. Completion Time	1:05	Audience	SWAT Team
# of Slides	12	External Content	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Documents	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Videos	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
		Web Links	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

### Training Overview:

### INTRODUCTION

Welcome to De-escalation Part 2 (ILT).

In this ILT, you will teach learners how to apply the knowledge they learned from the De-escalation Part 1 eLearning. This will be an application training for Call Center agents to engage with each other.

Throughout the training, when facilitating the De-escalation customer scenarios, remind the learners to share their experience when they have been on similar calls or used similar skills during their calls. If they have handled previous calls with mixed results, ask them to reflect and share how the specific strategies from the De-escalation eLearning and the knowledge applied through discussion in this ILT can help them improve their de-escalation customer calls now.

Not only will this keep learners engaged and allow for a more interactive experience, but it will also offer additional opportunities to reinforce good or correct bad habits before the learners return to work.

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

### Training Overview:

### COURSE PRE-REQUISITES

Learners must have completed the De-escalation Part 1 eLearning prior to taking this course.










### Training Overview:

### BEFORE TRAINING

- Download, open, and review the De-escalation Part 2 (ILT) PowerPoint deck.
- Download and print a Participant Guide for each learner.
- Review this Trainer Guide.
- Familiarize yourself with the Legend and icons used in this guide.
- Open the De-Escalation Shadow Observation Worksheet.
- Review the training environment to ensure that it is clean and ready.
- Be prepared to share stories/examples to reinforce topics.

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 as a trainer for the topic. This can include questions to ask.	 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.

<b>Training Overview:</b>	<b>COURSE STRUCTURE</b>
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Section Name		Slides	Duration
1	Welcome and Objectives	1-2	3 minutes
2	Strategic Intent and Customer Complaints	3-4	10 minutes
3	Activity	5-10	42 minutes
4	Summary and Review	11-12	10 minutes
		Total Time	65 minutes

**Note:** Timelines are close estimates. While extending time based on quality participation is acceptable, be mindful to keep the training on track.


<b>Section 1:</b>	Welcome and Objectives	<b>Slides:</b>	1-2		<b>3 min</b>
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# De-escalation ILT Training Customer Scenarios

January 2023  
Learning and Development

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 Welcome learners to the course.

[Trainer Notes]

 **Training Objectives**

[Trainer Notes]

Extended Training Notes	De-escalation ILT Customer Scenarios
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"><li>• Welcome learners to the course.</li></ul> <p><b>Extended Trainer Points</b></p> <p><u>The main point to make is:</u></p> <ul style="list-style-type: none"><li>• N/A</li></ul> <p><i>Optional Segue SAY:</i> “Let’s review the objectives for the course.”</p>	

## 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.

We are asking learners to engage their learning with focused thought, share and talk with each other, and make connections to knowledge. Look at the first word of each objective – emphasize these are words that encourage talking.



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



Strategic Intent

[Trainer Notes]

Extended Training Notes	TRAINING OBJECTIVES
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"> <li>• Review these objectives with the learners.</li> <li>• Encourage learners to use their Participant Guide to take notes.</li> </ul> <p><b>Extended Trainer Points</b></p> <p><u>The main points to make are:</u></p> <ul style="list-style-type: none"> <li>• The main focus of this ILT is to build on the knowledge and concepts from the De-escalation eLearning course.</li> <li>• The objectives in this ILT build on the objectives from the eLearning.</li> </ul> <p><u>In comparison of our objectives between the two courses:</u></p> <ul style="list-style-type: none"> <li>• We are moving from: ‘Explain’ to ‘Appraise’ the two reasons a customer wants to speak to someone in charge</li> <li>• We are moving from: ‘Recognize’ to ‘Discuss’ information you can cite using the Take Notes Technique</li> <li>• We are moving from: ‘Recall’ to ‘Relate’ the four techniques for speaking with a customer</li> <li>• We are moving from: ‘Identify’ to ‘Contrast’ the difference between positive priming words and negative priming words</li> <li>• We are moving from: ‘Cite’ to ‘Paraphrase’ the use of the R’s in the 4R method</li> </ul> <p><u>The two scenarios these skills are based on are:</u></p> <ul style="list-style-type: none"> <li>• Type 1: Customer who wants to speak to someone in charge</li> <li>• Type 2: Customer who is very upset, emotionally charged, and difficult to manage</li> </ul> <p><i>Optional Segue SAY: “Next we’ll discuss the strategies and techniques we’ll be taking to the next level.”</i></p>	

<b>Section 2</b>	Strategic Intent and Customer Complaints	<b>Slides:</b>	3-4		<b>10 min</b>
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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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 Share your experience or inspirational story about how you have implemented this connection. Inspire and encourage the learners by emphasizing that if they connect their hearts and minds as they deliver on our Brand Promise, they can more effectually earn loyal customers for life.

 Emphasize that this cannot be executed as a process. For the engagement to be genuine/effective, it must come from the heart.



Customer Complaints

*[Trainer Notes]*

Extended Training Notes	STRATEGIC INTENT
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"><li>• Review the slide content with the learners.</li><li>• We continue to connect with Who We Are and What We Do.</li><li>• We support our Discount Tire Strategy to provide an Inviting, Easy, and Safe customer experience.</li></ul> <p><b>Extended Trainer Points</b></p> <p><u>The main points to make are:</u></p> <ul style="list-style-type: none"><li>• What you learn from the eLearning and this ILT prepares you to use these techniques; it is not a script to follow word for word.</li><li>• This ILT is an opportunity to make a connection between your heart and your mind.</li></ul> <p><i>Optional Segue SAY:</i> “Now that we’re focused on earning loyal customers for life, it’s time to ask ourselves a tough question: “What is the cost of complaining customers when we lose loyalty?”</p>	



## CUSTOMER COMPLAINTS

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*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. Emphasize that 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.



Moving around the room and using proximity to learners can personalize the experience if they are not responding or engaging in the discussion.



Activity Overview and Participation

[Trainer Notes]

Extended Training Notes	CUSTOMER COMPLAINTS
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"> <li>Review the slide content with the learners.</li> </ul> <p><b>Extended Trainer Points</b></p> <p><u>The main points to make are:</u></p> <ul style="list-style-type: none"> <li>Remind learners to use their Participant Guide for additional information and notes. <ul style="list-style-type: none"> <li>Give the participants 1 minute to answer this question in their guide: <ul style="list-style-type: none"> <li>“What is the cost when we lose loyalty?”</li> </ul> </li> </ul> </li> <li>The value of taking care of a complaint eliminates churn, in other words, stops the bleeding.</li> </ul> <p><u>If the learners need more information to connect these points about customer complaints, use the following questions:</u></p> <ul style="list-style-type: none"> <li>ASK: What kinds of calls are most agents receiving this week, this month, this quarter?</li> <li>ASK: What call this week became a story everyone is talking about?</li> <li>ASK: How were these calls resolved?</li> </ul> <p><i>Optional Segue SAY:</i> “Now that we’ve covered our intention for today and the results of customer complaints, it’s time to talk about what we’re going to do about it. Let’s discuss our paired small group activities and participation.”</p>	

<b>Section 3:</b>	Activity	<b>Slides:</b>	5-10		<b>42 min</b>
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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



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Ensure learners understand how the activities work and participation expectations.



Be mindful of your timing for the next 4 slides. It is recommended to use a timer to stay on pace with each activity.



The next section consists of 5 paired discussions. You will have 8 minutes for each activity. Take 4 minutes to discuss in pairs (each person has 2 minutes to share), and 4 minutes to share as a group.



Paired Small Group Discussion

[Trainer Notes]

Extended Training Notes	ACTIVITY OVERVIEW AND PARTICIPATION
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"> <li>• The Trainer Guide is the main source of instructions for the Trainer.</li> <li>• Review the slide content with the learners.</li> </ul> <p><b>Extended Trainer Points</b></p> <p><u>The main points to make are:</u></p> <ul style="list-style-type: none"> <li>• Use your Participant Guide to support framing your paired or small group discussions and insights you gain during these activities.</li> </ul> <p><u>The time can be used in this way:</u></p> <ul style="list-style-type: none"> <li>• 4 minutes of paired (2 learners preferred) or small groups (3-4 learners)</li> <li>• The next 4 minutes is for sharing out as a group for everyone to talk about what they learned together.</li> </ul> <p><u>General Activity Expectations:</u></p> <ul style="list-style-type: none"> <li>• The next 5 activities will give everyone an opportunity to apply what they learned from the eLearning and talk about the concepts with each other.</li> </ul> <p><u>The goal in these activities is to:</u></p> <ul style="list-style-type: none"> <li>• Share experience of past calls.</li> <li>• Talk about phrases you can use now to solve those kinds of calls.</li> </ul> <p><u>In these discussions:</u></p> <ul style="list-style-type: none"> <li>• Share with each other.</li> <li>• Take notes from each other.</li> <li>• Be prepared to share out one insight you liked best.</li> </ul> <p><i>Optional Segue SAY:</i> “Now that we know what to expect during our activities, let’s get started with our first customer scenario!”</p>	

## 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.



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This activity applies to the objective, “Appraise the two reasons a customer wants to speak to your manager.” Ask and engage the learners to ensure they are reaching this objective.



Moving around the room and using proximity to learners can personalize the experience if they are not responding or engaging in the discussion.



Paired Small Group Discussion

[Trainer Notes]

Extended Training Notes	PAIRED SMALL GROUP DISCUSSION
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"> <li>Review the slide content with the learners.</li> </ul> <p><b>Extended Trainer Points</b></p> <p><u>The main point to make is:</u></p> <ul style="list-style-type: none"> <li>Use your Participant Guide to support framing your paired or small group discussions and insights you gain during these activities.</li> <li>You are empowered to do the right thing and take care of the customer.</li> </ul> <p><u>The definition from the eLearning on fear and trust was:</u></p> <ul style="list-style-type: none"> <li>Fear: The customer sees you as a threat to not providing the outcome they desire.</li> <li>Trust: The customer does not have trust in your ability to help them.</li> </ul> <p><u>If the learners need more information to connect these points about fear and trust, use the following questions:</u></p> <ul style="list-style-type: none"> <li>ASK: What is Fear and Trust from the customer perspective?</li> <li>ASK: What does Fear look like to you?</li> <li>ASK: How do we create opportunities to start resolving our escalated customer calls?</li> </ul> <p><i>Optional Segue SAY:</i> “Understanding this customer scenario prepares us to discuss a few solutions for it. First: Listening.”</p>	

## 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.



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This activity applies to the objective, “Discuss information you can site using the Take Notes technique.” Ask and engage the learners to ensure they are reaching this objective.



Moving around the room and using proximity to learners can personalize the experience if they are not responding or engaging in the discussion.



Paired Small Group Discussion

[Trainer Notes]

Extended Training Notes	PAIRED SMALL GROUP DISCUSSION
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"> <li>Review the slide content with the learners.</li> </ul> <p><b>Extended Trainer Points</b></p> <p><u>The main points to make are:</u></p> <ul style="list-style-type: none"> <li>Use your Participant Guide to support framing your paired or small group discussions and insights you gain during these activities.</li> <li>Listen to understand.</li> <li>Use the Take Notes technique to cite: Emotional Level, Problem Details, Sequence of Events, and Solutions</li> </ul> <p><u>Some of the explanations from the eLearning include:</u></p> <p><b>Solution Part 1: Listening</b></p> <p>When you listen for understanding where the customer is coming from and take detailed notes, you can be prepared to speak and share correctly what you heard.</p> <p><u>Emotional Level:</u></p> <ul style="list-style-type: none"> <li>Cite the customer's emotional level. Is it high, medium, or low?</li> </ul> <p><u>Problem Details:</u></p> <ul style="list-style-type: none"> <li>Cite some of the details of the problem the customer is calling about by asking questions.</li> <li>Also, note any details that will help you label the problem when you speak with the customer.</li> </ul> <p><u>Sequence of Events:</u></p> <ul style="list-style-type: none"> <li>Cite the steps and reasons that led them to calling.</li> <li>This will empower you to speak with confidence that you understand and can repeat the purpose of or motivation for their call.</li> </ul> <p><u>Solutions:</u></p> <ul style="list-style-type: none"> <li>Cite any solutions they are looking for or note the expectation they have in the result of why they called.</li> </ul> <p><i>Optional Segue SAY:</i> "Listening to understand and using the take notes technique prepares us to move into Solution 2 – Speaking."</p>	



## 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.” Ask and engage the learners to ensure they are reaching this objective.



Moving around the room and using proximity to learners can personalize the experience if they are not responding or engaging in the discussion.



### Paired Small Group Discussion

[Trainer Notes]

Extended Training Notes	PAIRED SMALL GROUP DISCUSSION
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"> <li>• Review the slide content with the learners.</li> <li>• Use this point in the ILT to change pairs and ask learners to share with different people.</li> </ul> <p><b>Extended Trainer Points</b></p> <p><u>The main point to make is:</u></p> <ul style="list-style-type: none"> <li>• Use your Participant Guide to support framing your paired or small group discussions and insights you gain during these activities.</li> <li>• When speaking, we want to extend empathy, label the problem, offer solutions, and speak with a can-do attitude.</li> </ul> <p><u>Some of the explanations from the eLearning include:</u></p> <p><b>Solution Part 2: Speaking</b></p> <p>Use the following four techniques when you speak with the customer:</p> <p><u>Extend Empathy</u></p> <ul style="list-style-type: none"> <li>• Be kind. Let them know they are not alone. Let them know you are grateful they shared their issue with you.</li> </ul> <p><u>Label the Problem</u></p> <ul style="list-style-type: none"> <li>• Address the issue specifically.</li> </ul> <p><u>Offer Solutions as a Trusted Expert</u></p> <ul style="list-style-type: none"> <li>• Focus on the solution, not the problem. Establish yourself as an advocate with your customers. Have integrity, be fair, and do what you believe is right.</li> </ul> <p><u>Speak with a Can-Do Attitude</u></p> <ul style="list-style-type: none"> <li>• Demonstrate you are listening and understand. Repeat what they have described. Speak with clarity, confidence, and a Can-do Attitude.</li> </ul> <p><i>Optional Segue SAY: “Now that we understand the aspects of the speaking solution, we can take a deeper look at what we should and should not say to provide solutions.”</i></p>	

## 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.” Ask and engage the learners to ensure they are reaching this objective.



Ask: 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 will you use when you are communicating bad news?

Sometimes “No” is the appropriate answer. Be prepared with a “Because” statement when providing bad news to the customer.



Paired Small Group Discussion

[Trainer Notes]

Extended Training Notes	PAIRED SMALL GROUP DISCUSSION
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"> <li>Review the slide content with the learners.</li> </ul> <p><b>Extended Trainer Points</b></p> <p><u>The main point to make is:</u></p> <ul style="list-style-type: none"> <li>Use your Participant Guide to support framing your paired or small group discussions and insights you gain during these activities.</li> </ul> <p><u>Some of the explanations from the eLearning include:</u></p> <p><b>Solution Part 3: Priming Words</b></p> <p>Using Priming Words (negative or positive) is about guiding your customer to the next steps. This includes the way we speak with customers about their situation or issue they are calling to resolve.</p> <p><u>The Goal:</u></p> <p>The goal is leading the call to a specific outcome that provides an acceptable solution for the customer and de-escalates the call quickly. This concept can be used productively with customer calls to resolve escalation faster and bring down call times. This concept is about preempting the escalation and keeping the customer calm.</p> <p><u>The Four Basic Steps:</u></p> <p>The four basic steps are:</p> <ol style="list-style-type: none"> <li>Identify negative or defensive statements.</li> <li>Identify what you want your customer to do.</li> <li>Restate your approach to guide customers to your outcome.</li> <li>Use a lot of personal pronouns (I, You, Your, We, Us).</li> </ol> <p><u>Negative Priming Words:</u></p> <ul style="list-style-type: none"> <li>Some priming words and phrases lead to negative outcomes, often increasing call times and longer paths to resolution. Don't mention supervisor or manager, or you will likely be transferring the customer to them.</li> <li>Ask yourself, "Are the things I am saying met with a negative reaction from the customer?"</li> </ul> <p><u>Positive Priming Words:</u></p> <ul style="list-style-type: none"> <li>Other priming words and phrases lead to positive outcomes, often decreasing call times and quicker paths to resolution.</li> <li>Ask yourself, "Are the things I am saying met with a positive reaction from the customer?"</li> <li>Continue using positive priming words to lead the customer to an active outcome restating your approach, offering options, sharing what you can do, and resolving the escalation.</li> </ul> <p><i>Optional Segue SAY:</i> "What if the customer call doesn't align with this customer scenario and, therefore, needs another approach or method? Let's look at another scenario and the solution we can apply."</p>	

## 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.



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




Paired Small Group Discussion

### [Trainer Notes]

**Scenario:** Stacy, a single mom, made an online appointment at the store for a flat repair. She waited 45 minutes after her appointment. before her car was pulled in and met with a Sales Associate that was very indifferent about the inconvenience. Service Technicians in the service area were messing around and had no urgency to get the vehicle done. Shortly after they started working on her car she was advised that her tire is not repairable and she needed to purchase 4 new tires for her AWD vehicle. She was running late picking her kids up from school and felt incredible pressure to make a purchase but did so against her better judgement. She was upsold from her current Goodyears into Michelins at nearly twice the cost and offered no certificates, no trade-in value, or more affordable options. She emptied her checking account to ensure she and her kids remained safe. By the time she arrived at the school she found her kids waiting on the sidewalk alone, with everyone having already left for the day. Having a bad taste in her mouth she went online and read a number of complaints speaking about these very same “sales fear tactics”. She felt completely taken advantage of and now questions whether she even needed new tires at all.

Extended Training Notes	PAIRED SMALL GROUP DISCUSSION
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"> <li>Review the slide content with the learners.</li> <li>Use the provided scenario or one written on your own.</li> </ul> <p><b>Extended Trainer Points</b></p> <p><u>The main points to make are:</u></p> <ul style="list-style-type: none"> <li>Use your Participant Guide to support framing your paired or small group discussions and insights you gain during these activities.</li> </ul> <p><u>Some of the explanations from the eLearning include:</u></p> <p><b>Type 2 Customer Scenario</b></p> <p>This scenario focuses on a customer who is very upset, emotionally charged, and difficult to manage. The following include some common aspects about customers, or people in general, when they are emotionally charged:</p> <ul style="list-style-type: none"> <li>Emotions come from the right side of the brain with a focus on feelings.</li> <li>They don't want to feel rejected or ignored.</li> <li>The temperature of the interaction is "high" or "hot."</li> </ul> <p><b>The 4R Method</b></p> <ul style="list-style-type: none"> <li>Recognize: Your response should express that you completely understand their concerns and display genuine empathy for their situation.</li> <li>Reframe: Reframe the conversation to center the focus on the issue at hand.</li> <li>Redirect: If the above is not successful, we utilize what is referred to as a "tactical assertive takeover." Jump in when the customer pauses, But NEVER INTERRUPT.             <ul style="list-style-type: none"> <li>If the customer continues to vent, wait for a pause and reengage.</li> <li>The intent is to redirect the customer away from their emotional response and engage them with a plan for resolution.</li> <li>This can be done by either redirecting with options or with three closed-ended questions.                     <ul style="list-style-type: none"> <li>Redirect with Options: Be prepared with more than one option. Options make the customer feel like they are in control, which is exactly what they intend to do .... control the outcome.</li> <li>Redirect with three closed-ended questions: The right side of the brain is the emotional side. When it is highly active, the intent is to move the customer's focus over to their left-side, or analytical side. We do this by asking three closed-ended questions.</li> </ul> </li> </ul> </li> <li>Resolve: Review the solution with the customer to make sure they are satisfied with the outcome and have clear expectations of next steps. Use this time to do a quick assessment. Does the customer still seem upset? If so, ask them if there is anything else we can do for them. Finally, thank them for giving us the opportunity to make it right for them.</li> </ul> <p><i>Optional Segue SAY: "Understanding the Type 2 Customer scenario and the 4R method brings our training full circle. Let's summarize our training and ensure we've made the right learning connections today."</i></p>	

<b>Section 4:</b>	Summary and Review	<b>Slides:</b>	11-14		<b>10 min</b>
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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
- 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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Review Strategy and Objectives. Engage the learners to ensure all training objectives were met.



Inquire if there were any inspirations from the discussions to encourage the learners with these closing thoughts.

Ask: "What did you connect with that brought your mind to focus to today's training? Are there any questions about fulfilling our intention today?"

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



Thank You for Attending

[Trainer Notes]

Extended Training Notes	STRATEGY AND TRAINING OBJECTIVES SUMMARY
<p><b>Training Delivery</b></p> <ul style="list-style-type: none"> <li>Review the slide content with the learners.</li> </ul> <p><b>Extended Trainer Points</b></p> <p><u>Some of the explanations from the eLearning include:</u></p> <ul style="list-style-type: none"> <li>Wrap Up <ul style="list-style-type: none"> <li>Customer Care involves using many skills at once.</li> <li>The skills discussed in this course were customer engagement skills.</li> </ul> </li> <li>We focused on two types of common customer care scenarios: <ul style="list-style-type: none"> <li>Type 1: Customer who wants to speak to someone that's in charge, and</li> <li>Type 2: Customer is very upset, emotionally charged, and difficult to manage.</li> </ul> </li> <li>We emphasized the de-escalation knowledge supporting what we hear and what we say in these scenarios.</li> <li>To that extent, we discussed core vocabulary (such as priming words), techniques (such as note taking and recalling), and methods (such as 4R's) to address solutions for these two customer scenarios.</li> <li>SAY: Now that you have completed this training, you, the SWAT Team Agents should be able to: <ul style="list-style-type: none"> <li>Appraise the two reasons a customer wants to speak to your manager</li> <li>Discuss information you can cite using the Take Notes technique</li> <li>Relate techniques used when speaking with a customer</li> <li>Contrast the differences between positive priming words and negative priming words</li> <li>Paraphrase the R's in the 4R method</li> <li>Discuss and share stories connecting the hearts and minds of the learners to the strategy of this training</li> </ul> </li> </ul> <p><i>Optional Segue SAY: "Thank You for your participation."</i></p>	



THANK YOU FOR ATTENDING

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Training Completion

*[Trainer Notes]*

### Extended Training Notes

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#### Training Delivery

- If there are any questions from the learners, note them and follow up with answers.

**Training Completion:**

**AFTER THE TRAINING**

## **POST ASSESSMENT**

Once learners have been marked complete in the LMS, the course Post Assessment will be available to be taken in the LMS. Have the learners log into the LMS and complete the exam.

## **COACHING AND PRACTICE**

Coach the employee(s) for evaluation and professional development as they are performing each strategy and technique with quality and professionalism.

Coaching and practice suggestions include:

- Reverse the roles and watch the trainees demonstrate the skills learned in this course
- Use the De-escalation Shadow Observation Worksheet as a coaching and mentoring tool – see below

## **DE-ESCALATION SHADOW OBSERVATION**

Once you and the learner are confident in their skills:

- Instruct them to login to the LMS and request their De-escalation Shadow Observation
- Once the observation is complete, mark the learner complete in the LMS.