



## HANDLING CHALLENGING SITUATIONS WITH A CUSTOMER-FOCUSED MINDSET

Most Customer Service Professionals deal with many challenging customer situations. These situations may include:

- A customer who is upset about the quality or delivery of our product/service.
- A product return or a cancellation of services.
- Incorrect information given to the customer.
- A customer who is negative toward your company due to past experiences.
- Confrontational issues and conflict.
- Angry customers.
- Explaining a company policy or procedure.
- Fielding a request to escalate a call to management.

The ultimate goal in these challenging situations is to provide a win-win solution. We want our customer to leave the interaction feeling listened to, well taken care of, and valued. A customer-focused mindset will have a tremendous impact on accomplishing these goals. Along with customer focus, an invaluable tool for dealing with challenging situations is the Five-Step Process. The Five-Step Process Have you ever been an upset customer, calling your product or service provider with a serious problem? If you receive a satisfactory resolution AND you feel listened to, well taken care of, and valued during your interaction, aren't you likely to consider doing business with this company again? The Five-Step Process will help us to provide our customers with this positive experience. Aside from reaching a win-win solution, the goal of the Five-Step Process is to leave our customers feeling listened to, well taken care of, and valued. Let's examine the specific steps of the Five-Step Process. Step 1 – Strategize How do you develop a strategy? • Develop your goal for the interaction. What do you want as the end result? (i.e., save the customer, resolve an issue, etc...) • Identify your parameters: what can you do or provide the customer independently or with your supervisor's approval? What CAN'T you do because of policy or business reasons? • Prepare by identifying common problems and win-win solutions. Your strategy should be to arrive at a solution that will be a win for both your company and the customer. If you are successful, you will retain the customer, exceed the customer's expectations, and provide a very positive customer experience so that he/she will want to continue doing business with your company. Step 2 – Acknowledge The acknowledgement is essential to communicating in challenging situations. Use phrases like, "I understand how you feel", "I see", "I apologize", "I am sorry", "I can see how you might feel that way" so that customers feel that they have been heard and that we respect them. It clears the way for us to move forward by helping diffuse the emotion and placing us on the side of the customer. Step 3 – Clarify Sometimes we mistakenly proceed to resolve a problem based on what we THINK the customer was saying. This third step of the process allows us to clarify and draw out information to make sure that we understand the customer's true concern. Examples of clarifying might include: • "What I hear you saying is.....is that right?" • "Can you tell me more about.....?" • "How may I help you....?" • "What were you hoping would happen...?" Clarifying leads us to the appropriate solution in a more efficient manner. Step 4 – Present Resolution The fourth step is to present a resolution. Presenting a resolution is not a challenge if we've done the first three steps properly. As we present the resolution, we want to state specifically what we are going to do for the customer. We may also offer alternatives. Note: As we discussed in Step 1: Strategize, it is critical to understand your parameters – what you CAN do for the customer and what you CAN'T do. Step 5 – Checkback The checkback is our opportunity to make sure that the customer is satisfied and feels good about the resolution. Examples of checkbacks include: • "How does that sound?" • "What do you think about x?" • "Are you with me?" • "Does that make sense?" • "Will that meet your needs?" • "Would that be satisfactory?" Applying the Five-Step Process The following example illustrates a customer-focused approach, using the Five-Step Process. Step 1: Strategize: Our strategy is to retain the customer whenever possible. We want to provide the customer with a positive experience while balancing both the business and customer needs. We don't want to simply accept return merchandise since we know we will lose the customer. A customer calls to complain about the quality of the product he received. Step 2: Acknowledge: "I apologize that the product was not of the quality that you expected. I understand your frustration. I can help." Step 3: Clarify: "In order for us to improve on the quality – and for me to better serve you, may I ask what specific areas were of poor quality?" Step 4: Present Resolution: "We would be happy to exchange the product for a similar product of higher quality." Step 5: Checkback: "Would that be satisfactory?" Depending on the customer's responses, we may actually have to go through the Five-Step Process many times during one customer interaction. The Five-Step Process will help you to avoid becoming argumentative by lessening the conflict and opening dialogue with the customer. It will assist you in providing a more positive customer experience. Terence R. Traut is the president of Entelechy, Inc., a company that helps organizations unlock the potential of their people through customized training programs in the areas of sales, management, customer service, and training. Terence can be reached at 603-424-1237 or ttraut@unlockit.com. Check out Entelechy's website at [www.unlockit.com](http://www.unlockit.com).

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