



What to Say to Defuse Even
the Worst Customer Situations

RICHARD S. GALLAGHER

FOREWORD BY CAROL ROTH

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Customer Service
Survival Kit

THE

Customer Service Survival Kit

What to Say to Defuse Even the
Worst Customer Situations

Richard S. Gallagher

Foreword by Carol Roth

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To Colleen, my joy and my soul mate

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Introduction

I LOVE worst-case scenarios.

Why? Because they hold the key to creating truly incredible service.

Think about it. There is a lot of bad service out there. And most of it happens because people who serve the public constantly fear the worst, and then react to everyone from a defensive posture. Scratch the surface of most disengaged people who serve the public, and more often than not you will find fear lurking there. They feel alone and vulnerable on a very public stage, worrying about when the next customer will leave them twisting defenselessly in the wind.

When service providers don't bother to ask you what you want, it is often because they are afraid they won't be able to handle what you tell them. When they tell you "no," they are hiding behind their policies because they have no idea how to negotiate with you. Even though they wear name tags that say "Hi, Can I Help You?" they are silently praying you will just go away creating as little damage as possible. And when you demand to speak to a manager, they often pass you off to someone who is as frightened and as clueless as they are.

So how do you change this fear? By teaching people the skills that hostage negotiators, crisis counselors, psychotherapists, and police officers use in their worst situations. When people learn these skills,

everything changes. They become supremely confident in any situation. They can really engage customers, because they know they are able to lean back on these communications skills for anything someone might throw at them. It is here, in this zone of incredible confidence, that greatness takes root.

I know this works because I have watched it happen over and over.

Let me share a little about myself. I am a former customer support executive who is now a public speaker as well as a practicing marriage and family therapist. My specialty is teaching people what to say in their most difficult situations. (In other words, when I am not busy having people get angry at me onstage in front of large audiences, I put myself in the middle of other people's family conflicts—go figure!)

Before I did that, I had a reputation for dramatically turning around the performance of customer-contact operations: creating near-perfect customer-satisfaction ratings, near-zero turnover, and record sales. It was here that I discovered the incredible power of the worst-case scenario. I found that when you teach people how to handle these worst cases, they become superstars. And when you teach *everyone* on a team how to handle them, the results are truly magical.

Worst-case situations are defined by a customer's extreme reaction, no matter what actually happened. This book will teach you how to handle these situations calmly and professionally. Many of the book's examples will walk you through scenarios where the stakes are high, where people are completely unreasonable, or where someone is hopping mad and you are totally, utterly at fault. Others will examine routine situations where the wrong words could ignite a confrontation, and the right words can prevent one. You will learn how to walk safely into all of these discussions, defuse them with the skill of a bomb squad, and send everyone away feeling better.

Best of all, you don't need to become braver, smarter, or craftier. You just need to use different words that I will teach you, step-by-step, using scenarios many of us lie awake at night worrying about. These words come from very recent, empirical principles of communications psychology that trigger the way other people think and feel.

Using real-life dialogues and chapter exercises, including an appendix with my solutions, you will learn the same communications skills that I teach in my live training programs.

There is just one catch to learning these skills: You must be prepared to take your human nature and stand it on its head. Instead of defending yourself, you will learn how to lean into criticism with gusto. Rather than minimizing the consequences of something, you will learn how to out-dramatize an angry customer and to take catch-phrases like “I understand” and banish them forever. You will also learn to challenge your assumptions about difficult customers. It will be a wild ride in spots.

Here is why the ride will be worth it. Techniques like these spring from the relatively new field of strength-based communications, which has swept areas like athletic coaching, psychotherapy, and business leadership like a tidal wave in recent years—because it works. And when you see how well it works in your most difficult customer situations, it will become clear why all those years of telling yourself and your team to be “nicer” never changed anything. When you get rid of the fear that sits behind most human interactions, you will find an authentic core of confidence that drives great service.

When we first ask people how they would handle really tough situations in our training courses, they often reply, “We’d ask our boss to handle it.” In this book, you are the boss. And by learning and practicing these skills, you stand a good chance of becoming the boss in real life, if you aren’t one already. Leaders often stand out because of their ability to resolve conflict, and you are about to join the club.

There is one more reason for learning how to handle your worst customer situations. These skills will affect the rest of your life in a big way. They will change the way you communicate with your supervisors, your coworkers, your children, and your life partner. (Trust me on this one—I have been together with mine for nearly forty years.) When you know how to make it safe to talk about anything, you get an added bonus of trust, intimacy, and goodwill that fundamentally changes your relationships with others.

Your cost for all of these benefits? You just need to be prepared to

look at your worst customer situations differently, with an open mind, and be willing to put these techniques to work. They take practice, but in time they will become a natural part of who you are. And then you will discover, as I have, how your worst customers can become the best friends your service career ever had.

CHAPTER 1

Understanding the “Uh-Oh” Moment

I AM STANDING IN FRONT of hundreds of people, microphone in hand, on the stage of an auditorium. I ask the audience a simple question, one of many I will ask that morning. But this is the only one that instantly causes nearly every single one of hundreds of hands to shoot into the air:

“Have you ever had a customer situation that went really, really wrong?”

When you scratch the surface of any group of people who work with the public, you will hear a truly amazing litany of war stories. Physical and verbal intimidation. Outrageous demands. Letters telling your boss how horrible you are. Threats of lawsuits. Or perhaps the thing many of us fear the most: devastating consequences for a customer that were your fault.

These are what I call the “uh-oh” moments: unplanned, unscripted, and often extreme situations. Moments where good intentions are not enough, and human nature fails us. It is in these moments that the sunshine-and-smile training school of customer service collides with the real world. They do not happen very often. Hopefully they are just a small fraction of the situations you deal with across your career. But if you work with customers long enough, like nearly half of all people working today, they will eventually happen to you.

That is where this book comes in. It will not teach you how to be

“nice.” It will not help you have a good attitude. And it will not discuss basic customer relationship skills that your mother probably taught you when you were six. Instead, in this book we are going to arm you with tools to handle your very worst customer situations—tools that people like crisis counselors, hostage negotiators, psychotherapists, and others use to gain control of these situations. In the process, you will discover how to become supremely confident in *any* customer situation, and fundamentally change the way you deal with the public.

Why Worst-Case Scenarios Are Important

Worst-case scenarios can be frightening and challenging. Yet at the same time, they happen pretty infrequently for most people; I would say no more than a fraction of a percent of our overall transactions, based on my informal surveys of speaking audiences. So if this is the case, why should we bother learning to handle them? Can't we just call in our boss, or suffer through them when they happen?

I have a different view. I personally believe that learning how to handle your worst customer situations is the single most important skill you can learn in your career, and that teaching your team these skills is the surest way to succeed as a leader. Here are three reasons why:

1. These are all teachable skills, and most people do not know them until they are taught them. For example, years ago I had no idea what I might say to someone threatening suicide. Now I *do* know because of the skills I was taught when I worked on a crisis line. Once you have learned how to manage crisis and conflict, these skills stick with you for the rest of your life.
2. Learning to handle your worst situations is the key to delivering excellent service *all* of the time. It is the secret weapon that most smile-training books never talk about. Wherever I worked, it was our single biggest tool in changing the way we dealt with customers.
3. These skills change *you*. Shakespeare wrote, “Cowards die many times before their deaths, / The valiant never taste of

death but once.” When you feel supremely confident walking into any customer situation, your view of your job—and life itself—changes dramatically.

Do you ever wonder why so many employees act rude, snippy, and disengaged? Why companies that seemingly want your business employ people who act like they are off in another zip code somewhere? Why entire companies sometimes fail to do the right thing?

It isn’t because these people’s shorts are all too tight. More often than you think, it is because they constantly operate from a defensive posture, driven by a fear of what might go wrong. They constantly have their shields up and their swords drawn, even in the most innocent encounters, which is why pushing them to be nicer never works: You haven’t taken that core fear away.

This is why customer-contact teams I managed did so incredibly well after they learned how to manage crisis situations. I didn’t ask them to smile more often, change their personalities, or work harder. Instead, I simply taught them how to execute in the worst situations they could imagine. Then these people, who had just about every personality on the face of the earth, had the skills and confidence to make each customer feel fantastic, no matter what the situation. And yes, they also shone in a crisis.

Nowadays I speak to thousands of people a year all over North America, helping them understand and manage their worst customer situations. Wherever I go, I see the same thing. Nearly everyone, from entry-level employees to senior executives, handles serious conflict the same way—like deer frozen in the headlights—until they are taught what to say and do. Then magic starts to happen. So now, let’s look at a sample of this magic in action.

What Would You Do?

My good friend and colleague, speaker, and trainer extraordinaire Julie Kowalski had an experience that ranks up there as one of the worst

service experiences I have heard of. I don't think I could make up a situation as poorly handled as what actually happened to her.

Julie was planning a family vacation to Hawaii, and being a busy public speaker, she decided to order her vacation clothes from a regional store near where she lived. The store promised the clothes would arrive well before her vacation. They didn't. And as she called, day after day, the store kept promising they would arrive "tomorrow."

Finally, the last "tomorrow" came. Julie was waiting for the cab to the airport with her empty suitcases, and the clothes still didn't arrive. She reluctantly took off for Hawaii, planning to buy a few things when she got there. Meanwhile, the store finally delivered the clothes later that day, dropping off exactly two of everything she had ordered and charging her twice as much as she had expected. When she arrived in Hawaii, she discovered that her credit card was maxed out. She spent a week in paradise with no clothes and no credit.

After she got home, she called the store and was told by a snippy employee that she would have to document what happened in writing. So she did, in the form of a fourteen-page letter that she had her assistant fax to the store—over, and over, and over, and over again.

Now, how would you like to have been the lucky employee who had to respond to my friend Julie?

A manager from this retailer did, in fact, call her back, and according to Julie, she nailed it perfectly. (So well, in fact, that Julie's assistant later wondered why she didn't hear any yelling or arguing after putting the call through.) These were the first words out of this manager's mouth:

"I read your letter, Julie. After everything we have put you through, I can't believe that you are still giving us an opportunity to make things right. I want to learn more about what happened, and see what we can do to repair the damage we have done here."

There is a great deal of psychology going on in an opening like this. Here are some of the things that this manager accomplished with this opening statement:

- ▶ She let Julie know that she had read her complaint, and then demonstrated it by sharing her disgust at the situation.
- ▶ She used Julie’s name.
- ▶ She preemptively matched Julie’s level of emotion.
- ▶ She framed Julie’s response—which, remember, had consisted of angrily faxing a long letter over and over—as that of a reasonable person.
- ▶ She took a posture of serving Julie rather than defending herself.

Then, as Julie recounted her grievances, this manager clearly acknowledged and restated each of them in turn. Whether she had unusually good intuition or had been well trained (I suspect both), she succeeded in turning a potentially explosive encounter into a rational discussion.

To its credit, the store did a good job of service recovery. It refunded all of my friend’s money, told her to keep the clothes for free as a gesture of apology, and promised to investigate what happened. But before any of this could happen, the road to recovery was paved by saying the right thing when the situation demanded it.

Good Intentions Are Not Enough

You may be thinking to yourself, “I am a pretty smart person. I am also a very nice person. I am good with people. And I can think on my feet. Those skills should get me through most difficult customer situations, right?”

Wrong.

As much as I deeply respect nice people, being nice is not the same as knowing the right words to say in a crisis. In fact, my experience with employees is that these skills have much less to do with whether you are a “people person” and much more to do with how well you have been trained and coached.

Here is a pop quiz to show you what I mean. Let’s say that a customer is furious because she was not allowed in to see a major

concert the night before because of a misunderstanding over whether her ticket was valid. Take a moment to write down what you would *first* say to her.

Now, answer the following questions:

- ▶ Did you use the phrase “I understand” in your response? As you will learn, this is a dated catchphrase that is as likely to enrage your customer as soothe her.
- ▶ Did you try, even a tiny bit, to explain what might have happened? For many people, this is the first club out of their bag. But you will learn that explaining things too soon serves no purpose and only makes the other person more upset.
- ▶ Did you start by offering to do something to make up for this? That may seem like a good response, but if it was the first thing out of your mouth—without first making sure she feels acknowledged and asking good questions—you may actually be setting her up to escalate her demands further.

Chapter 13 presents a case study that explains how to handle this situation. For now, here is a quick summary: Mirror the gravity of her complaint, ask questions to learn what happened, and validate her statements every time she speaks. Then explore what she feels needs to be done to make this situation right and negotiate an appropriate level of service recovery.

Some of you reading this may have responded the same way. Good for you! But many of you, no matter how nice you are, will have said things that were ineffective or even harmful. And some of you might have struggled with what to say at all.

This is the heart of the “uh-oh” moment: When we most need to be present in a customer’s situation, the majority of us say the wrong things or turn into a block of ice. That’s because we are uncomfortable and often frightened. And more to the point, because we really don’t know what to say. A lot of bad service, especially in a crisis, happens because we simply haven’t been taught the right words to say in critical situations. Even some of the world’s biggest companies say the wrong things in a crisis, with examples as close as your nightly news.

One of the best analogies I can think of to this situation is acting. Most of us think we can do it. It looks natural when we see it. But when you observe professional actors carrying out a scene more closely, they aren’t up there being themselves: They are executing a series of well-rehearsed individual steps. They are positioning themselves at specific chalk lines on the stage, waiting for precise moments to deliver a line, and timing their moves. If you or I took the stage and tried to repeat their scenes, we would appear clumsy and amateurish—just like most of us do in critical customer service situations.

Perhaps an even better comparison is police work. When officers receive a call about a burglary in progress, the police I know don’t clasp their heads in their hands and moan, “Oh, my goodness, someone is stealing something!” Instead, they hop into their patrol car and do what they have been trained over and over to do. These officers are masterful at defusing a crisis because they have been taught to do so. And with the right training, you can learn to defuse your crises with customers as well.

What to Say When the Unthinkable Happens

When Jeff Greenman kissed his wife and drove to work one sunny September morning as a manager for a major U.S. airline, he had no idea that by the end of that day, two of his company’s planes would crash at the hands of terrorists, all air traffic in the United States would be shut down, and he would be rushed to a crash site to work with victims’

families for weeks. How did he personally handle the aftermath of the September 11, 2001, tragedy? As a trained member of his airline's Special Assistance Team, he walked into this situation having a very clear sense of how he would interact with people, using tools such as these:

- ▶ Asking open-ended questions to assess what people needed
- ▶ Acknowledging and paraphrasing what people said
- ▶ Using focusing questions to shift into problem solving
- ▶ Never saying "no," but instead responding in terms of what he *could do*
- ▶ Letting people know that whatever they were thinking and feeling was OK

Jeff had a process to what he was doing, not just good intentions. He knew how to respond to anger, tears, and outrageous demands. He knew how to help people feel heard and supported in some of the worst moments of their lives. Over the weeks he spent with the families of 9/11, he built relationships that benefitted them and his airline's reputation. In fact, he describes his biggest challenge as a positive one: disengaging from all the good relationships he built with these families as he returned to his regular duties.

This is the heart and soul of how to handle a crisis with a customer: Be trained, be prepared, and then know how to execute when a crisis happens. When you become good at it, you still care very much about your customers, but the mechanics of what to do become, in a sense, another day at the office.

The rest of this book explores specific skills you can use in a customer crisis, followed by chapters with detailed case studies on how to handle some of the worst situations you can imagine. Each skills chapter has questions and exercises you can use by yourself, or (better yet) together as a team. And finally, we look at important issues such as keeping yourself safe and knowing your limits. Let's get started.