

# Best Practices for Taking the HEAT

## Hear Them Out

1. Be silent and let the customer express emotions, feelings, and concerns.
2. Take a deep breath and focus on the customer's words and the feelings behind them. Don't withdraw to avoid the unpleasantness of the situation
3. Show you are listening by nodding your head or making a verbal acknowledgment.
4. Use nonverbal behavior, such as leaning forward, to show you understand and care.
5. Avoid inappropriate nonverbal behaviors, such as rolling your eyes, sighing, crossing your arms in disgust, frowning, staring, or glaring.
6. Refrain from multitasking. Put down the phone, close the register, shut your office door, etc.
7. Stay in control of your emotions and don't take the customer's dissatisfaction personally. Speak calmly when clarifying details and responding.
8. Summarize and restate the problem to check for understanding and show the customer that you've heard him or her. Then ask, is that correct / or Did I miss any details?
9. Maintain eye contact while taking notes.
10. Don't rush to a solution. The customer wants to be heard and trying to resolve the situation too quickly could escalate the person's anger.
11. Don't touch an angry customer. This could lead the person to respond physically.
12. Take immediate action if a customer uses profanity, attacks you verbally, or physically threatens you or others. Ask the customer to stop, if your warning is not taken seriously, involve a supervisor and, if needed, inform security.

## Empathize

1. Rather than urging the customer to calm down, use empathy to acknowledge the customer's feelings and defuse his or her anger.
2. Use the Empathy Key Principle to address the facts of the situation and the customer's feelings: "I can understand why you're frustrated. I realize now that this report doesn't contain last year's figures."
3. Don't question the customer's intelligence or credibility. Don't ask, "Are you sure you understood the due dates?"- Instead say, "I know there's a lot of information here, and it can sometimes be confusing. Let's review the due dates." Then use the Involvement Key Principle to focus the customer on helping you identify the issues: "Can you help me see what you understood the terms of the contract to be?"

## Apologize

1. Apologize without accepting blame: "I'm sorry that this happened." "I apologize for the inconvenience." "I'm sorry that the product didn't meet your expectations." "I'm sorry this upset you."
2. Do not apologize before you empathize, or you'll sound insincere.
3. Keep your tone natural to avoid being perceived as sarcastic or insincere.
4. Uphold your organization's integrity and reputation. Don't say, "It doesn't surprise me that this happened," or "This isn't the first time this has happened."
5. Don't apologize too profusely—you might make yourself or the organization appear incompetent.
6. Take Responsibility for Action
7. Acknowledge your desire to make things right: "Let me take care of this for you."
8. Reveal your intentions to build the customer's confidence in you. Say "Here's what I would like to do. ..." or "Here's what I can do...."
9. Focus on what you can do rather than on what you cannot do.
10. Know your options and level of decision-making authority. Using sound judgment, meet or exceed the customer's expectations.
13. If you are unable to take immediate action:
  - Refer the customer to someone who can act, such as a peer, your manager, or another department.
  - Volunteer to talk to one of these people on behalf of the customer.
  - Take notes and give the customer a time frame in which to expect follow-up.
  - Follow up as you committed to, even if you have nothing significant to report. This will demonstrate your commitment to getting results.
  - Complete appropriate forms or documents that will ensure the customer gets what he or she needs or what was agreed to.
  - Do it! Fulfill your promises.
14. Use the Involvement Key Principle, especially when you are able to provide options: "Which would you prefer?" "How do you think we should handle that?" "What did you have in mind?"
15. Use the Support Key Principle, especially with internal customers. For example, if you are working with an IT representative on a software problem, you might say, "I'll work with you to pinpoint the solution, but I'll need you to implement it."
16. Keep in mind that a walker might agree to any terms you offer but might remain dissatisfied, so be certain to check the customer's satisfaction.
17. Feel good that you have turned a dissatisfied customer into a satisfied one, thus meeting your personal and organizational objectives.

18. Remember that your goal is to retain the customer. Losing an external customer or alienating an internal customer can be costly.