Adventist Health Systems
HR Shared Services - Contact Center
New Hire Training

Conversations and Escalations

Facilitator's Guide

Module 4

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Adventist HEALTH SYSTEM

Contents

 This symbol represents a “Hot Topic”.

 This symbol represents “MAGIC Reminders”.

Overview

As a service provider in a contact center environment, you communicate with customers primarily through conversations. Each conversation allows you to develop a relationship, uncover needs, help provide assistance towards resolution, and leave the customer feeling satisfied and confident that their issue is being handled appropriately.

Sometimes distractions and other obstacles prevent you from having effective customer conversations that may end up in an escalation. The goal is to help you develop methods of how to maintain control of the situation while providing accurate solutions; how to identify the most appropriate course of action to ensure high customer satisfaction; and provide tools and resources to become an effective communicator. We will review processes that apply to escalation types; when to escalate and the appropriate group to escalate to if you are unable to solve the issue.

This module is designed to help you overcome various barriers so you can guide the situation through productive conversations with MAGIC principles towards effective resolution. It will walk you through various angry customer types and provide skills for conducting conversations that attend to the customer needs even when the conversation turns unfavorable.

Objectives

- Demonstrate conversation process
- Recognize barriers to effective conversations
- Gain customer confidence and cooperation through effective questioning
- Discuss case escalation process
- Demonstrate effective methods for delivering bad news

To get started, let's do an exercise.

Facilitator Notes

Directive	**Provide**	**Timing**
Identify ways participants handle a given situation. One person in group is customer. One person in group is rep. No escalation or attitude from customer.	**Scenario**: *Employee calls the contact center and wants to know the pay range for her position. She is upset as she feels she has not been given the right information from her manager. Tier 1 received the call on a Monday afternoon at 5:58 pm.*	3 minutes
Discuss briefly		

Conversations

As you can see from the exercise, guiding customer conversations can be difficult. Each customer presents a unique set of challenges. Understanding the components of a conversation help overcome barriers. The way you open the conversation sets the tone for the rest of the interaction. Treating each customer as an individual and offering a pleasant greeting helps establish a positive relationship while building confidence that their business is valued and their needs will be taken seriously.

After the customer is greeted, they want to express their needs or issues from their own point of view. Being patient and actively listening while the customer relays their concerns gives the impression that you are attempting to understand their perspective. Listening attentively is essential to building trust.

It is important to formulate questions to help uncover the "big picture". Open-ended questions do not have an anticipated response, but instead allow the customer to respond freely providing what they think is appropriate, important to them, or useful for you to gain a good understanding. Begin this type of questioning with what, why or how. Closed-ended questions have an anticipated, or limited number of responses such as a short phrase, fact, date, or one-word answer and help get to the "heart of the matter" with details that may have been forgotten or skipped. Follow-up questions can be a combination of both question types and help ensure you have all the information needed to provide the best solution.

MAGIC Reminder: Use the Five MAGIC Steps with each conversation to establish quality communication and help uncover the Catchpoint.

As you learn about the customer's needs, assure them you are paying attention and ready to help by confirming your understanding. To do this, paraphrase the issue and details back to the customer in your own words to recap and restate the issue.

Finally, if the call seems to be going off track from the original issue, you can move it in a productive direction by knowing how to gain your customer's cooperation. First and foremost, it's important to use tact when you refocus. Sometimes we can think it's okay to hurry them along, but acting without showing respect for them as an individual almost always results in an escalation to a supervisor, manager, or other department because they do not feel you are listening or they do not feel valued. If this happens, the best thing to do is to provide a quick summary to let them know you did hear them and their situation is important to you. The summary should show that you value the customer's ideas, feelings, experience, and opinions.

> *"Mrs. Smith, it's great to hear that you are able to ___________________. It sounds like you are on the right track but you are also correct in the statement you used about _______________. That provides a lot for you to consider. I have heard of this issue happening before, and what I have found to happen is ______________________ when the customer did ____________________."*

After you provide the summary, check to ensure the customer has understood the direction you are going and is willing to shift gears with you towards resolution.

- *"Would it be all right with you if I check on_____________?"*
- *"May I do ___________ for you? "*
- *Do you mind if I ask you a few more questions?"*

Note: If the call has gone too far off track, or you cannot get the customer back on the same page with you, it might be necessary to return to providing empathy and begin the probing line of questions again.

Customer Conversation Process

Conversations have very specific components allowing the interaction to maintain a certain level of professionalism and direction. The CC (Contact Center) callers are customers with a wide range of issues however, the format for all calls follow the same path each and every time. This provides a consistent process, and sets the tone for delivering the high level of professionalism required to create high customer satisfaction levels. Let's review the components of a conversation.

1. Greeting – the opening sets the tone for the call. Make sure it is pleasant!
   - Always use a tone of voice that is pleasant, sincere, and conveys interest
   - State the standard greeting – *"Hello! Thank you for calling HR Shared Services, this is ____. How may I assist you today?"*
2. Verification – required for legal reasons
   - Finesse pop-up screen – verify first and last name, along with birthdate
   - Manual search using HRHD to confirm the person calling when the profile does not auto-populate – verify first and last name, birthdate, and last 4 digits of the social security number
   - Use "Please" and "Thank You" when asking for information
     - ➢ *"I would like to help you with this issue will need to ask you a couple of questions first, is that ok with you?" (wait for response) "May I please have your first and last name? Thank you Mrs. Smith. May I also have your birthdate?" "Thank you so much!" "Ok, Mrs. Smith……."*
3. Listen without interruption or distraction to customer's situation
   - Use the customer's name immediately and often throughout the call
   - Listen, take notes in Word Pad, and do not interrupt
     - ➢ **Best Practice:** Use Word Pad on all calls to capture your notes and details that you are required to place in the "Details" section of HRHD. Word Pad allows you to complete a spell check first to check spelling and grammar, then copy and paste directly into the system.
     - ➢ Using Word Pad ensures you do not lose any notes in the case of a power outage, or system time out.
   - Remove all distractions to focus 100% on the conversation with the customer
     - ➢ Put your phone away (no texting, Facebook, Twitter, Instagram, etc.)
     - ➢ Close any books or reading materials
     - ➢ Set aside any paperwork or other projects
4. Provide empathy statements
   - Empathy shows you are listening and interested in the conversation
   - Be fully engaged
     - ➢ *"Mrs. Smith I can really hear the frustration you are feeling about________. "*
     - ➢ *"I know that has to be a difficult situation to manage."*
     - ➢ *"Mrs. Smith, I understand your concerns and know this has really upset you."*
5. Probe using investigative questions to gain understanding
   - Ask open-ended questions that do not have anticipated answers allowing the customer to discuss the issue in detail to uncover the big picture and get to the heart of the matter
     - ➢ *"Mrs. Smith, can you tell me a little more about ___________?"*
     - ➢ *"Mrs. Smith, how have you handled this issue in the past?"*
     - ➢ *"Mrs. Smith, why do you think __________________?"*

- Ask close-ended questions requiring a yes/no, a single word or few word answers that allow you to obtain and confirm the details
    - *"Thank you Mrs. Smith for giving me these details. Let me review them to ensure I have not missed anything. You stated ___________________________." "What that regarding last month as well?"*
    - *"Mrs. Smith I also understood you to state that ______________________, is that correct?"*
- Use follow-up questions to get additional or unstated relevant information
    - *"Mrs. Smith, what else can you tell me that might help me better understand the situation?"*

6. Paraphrase details back to the customer to confirm understanding and acknowledge the concern
    - Repeat key words and phrases the customer used
    - Summarize the situation in your own words
        - *"Mrs. Smith, let me make sure I fully understand. You stated…."*
    - Check-in with the customer for agreement on the heart of the matter and the perceived expectation of the outcome
        - *"Mrs. Smith, what I am hearing is ______ and you are looking for ______, is that correct?"*
7. Search solutions and education to provide the customer
    - Search for solutions in HRHD with the profile of the verified customer to receive solutions appropriate for their specific facility accuracy
    - Collaborate appropriately with other teams to get the right answers
        - *"Mrs. Smith, I really appreciate you allowing me to help with (repeat the issue back). What I am able to find is… (provide the solution)."*
        - *"Mrs. Smith, I know this situation has been difficult, but what I can do is reach out to (department name) on your behalf to get more specific details about the solution so you do not have to call back…" or "what I want to do for you is to reach out to our (dept. name) for further clarification because I want to ensure I direct you appropriately. May I do that for you?"*
    - Use your resources – HRHD, HR Answer Link, etc. to help educate the customer on process driven solutions, or to help them become more independent in the future
        - "*Mrs. Smith, have you had an opportunity to log into the HR Online and look at your paycheck information? May I provide you with the information so you can do this from any device and even from home?"*
8. Share information
    - State the appropriate solution and any details pertinent to the situation
    - State details of the unfavorable answer in accordance to MAGIC principles (Bad News Burger)
        - Explain the answer using an empathy statement about the situation
        - Provide the solution in a statement form
        - Follow up immediately with another empathy statement about the situation
            - *"Mrs. Smith, I know the situation with your paycheck has been very frustrating. Currently there are not any changes scheduled for the pay period. I understand the situation you are facing and appreciate your patience as I have looked into this using all the resources available to me."*
9. Discuss next steps
    - Provide any steps you need to take before closing the case
        - *Mrs. Smith, I really appreciate your patience as I have looked into _______________for you. What I need to do next is _______________________."*
    - Provide anything required by another team to close the case to include follow-up details

- ➢ *"Mrs. Smith, I have provided the information to _________ who can be reached at ____________. They will contact you within ___ (hours or business days) with more information on how to complete ________________."*
- Provide any details regarding what the customer must do once the case is closed, or to close the case in the future
  - ➢ *"Mrs. Smith, what I recommend you do is _________________."*
  - ➢ *"Mr. Jones, your next steps for closing this case is to _______________ by (date)."*

10. Close with the relationship in mind – the close leaves a lasting impression. Make sure it's a good one!
    - Once the answer has been provided and the customer is happy with the outcome, transition the call to close:
      - ➢ *"Mrs. Smith, it has truly been a pleasure helping you today. Is there anything else I can assist you with before we hang up?"*
    - If the customer is not happy with the result, and you have done everything in your power to provide the best possible solution, transition to close using positive statements:
      - ➢ *"Mrs. Smith, your patience has been amazing. Thank you very much for allowing me to help you, even though I know it was not the outcome you were looking for. Is there anything else I can do to assist you?"*

Additional Need

Often, customers have a need that they don't ask about – an additional clue given that you must be ready for. These additional clues can come from something they say that stands out; information from their profile; how they describe the situation; or their vocal tone and insistence for a specific outcome. To determine if a real need exists, you will need to ask effective questions relevant to the clues given. For example:

> *"Mrs. Smith, I know we have been talking about your paycheck not being correct, but you just mentioned that your time card was updated by your manager last week. Is that something we can explore in a little more detail to ensure nothing is overlooked?"*

Customer Concerns

After presenting customers with the solution, they may voice concerns or be reluctant to the information, which can be a good thing! Concerns to your explanations mean the customer is paying attention and tracking with you, and have enough interest to express their concerns. This may come up in one of the following three expressions:

Skepticism- the customer has doubt you can do/deliver what you said you could do
Misunderstanding – they have incomplete or inaccurate information that limits making sense of the solution
Drawback – the customer sees an issue with the feature or benefit of the solution provided

If you encounter any of these, paraphrase their new concern, provide empathy, and restate the initial concern and solution if you have already provided it. Focus on approaching it with positive statements to help maintain confidence in the provided solution.

MAGIC Reminder: Always remember to use MAGIC, versus TRAGIC language and act professionally.

SHOW YOU KNOW

Now that we have reviewed the parts of a conversation, let’s put it into action by participating in a group exercise. Mind map / Brain Dump

Facilitator Notes

Directive	Provide	Timing
Using a Mind map or Brain Dump exercise...Discuss proper way to handle the situation in support of content covered. In your groups, let's look at a scenario. Follow the 10 steps listed regarding the conversation. Be sure to utilize the appropriate statements or questions at each step for both practice and to get comfortable about the conversation process. Choose someone to be the customer, and someone to be the representative. Follow all the steps required and use your laptops to simulate use of the appropriate resources.	*Scenario:* Customer is calling because she needs to talk to someone about her health benefits. She has a new baby. Additional info: baby is 2 weeks' old Customer: Mary Hunt Birthday: 1/9/86 Resolution: A new baby is considered a life event. If the baby is under 30 days old she can add the baby but must upload a copy of the birth certificate. Effective date of coverage is the baby's birthday. Resolution: Educate on navigation to the HUB>My Benefits> Dependent Info>Add child information. THEN go back to My Benefits>Life Event link on HR Answerlink to upload the birth certificate Solution to close the case= Having a Child	30 minutes: 10 minutes to work through the call process.
Capture process pieces well done	Flipchart	20 minutes to discuss with class and demonstrate
Navigate the HUB walk through the steps for the employee to add the child. Find the solution in HR Answerlink	Laptop	

Taking Ownership

Taking ownership of every call you receive is key to providing excellence in service to our customers. When you take ownership, it means you exhaust every avenue, every system, and every resource possible to provide a solution to the customer. It does not mean handing the call off to someone else because you don't want to deal with it, or giving up because the customer is one of the personality types that are most likely to cause an escalation. It does mean that you own the call as if it were your mother calling with a problem and you wanted to do everything in your power to handle it so she would be proud of you. In customer service, applying that mentality to every call will provide higher satisfaction results not only from your customer, but in yourself.

If you look through the lens of the customer (internal or external), you find a detailed view of what type of experience they expect from the Shared Services Contact Center.

- Seamless – they want to take advantage of the full range of services you provide but do not want to talk to numerous people. They want to speak with one person who is able to handle multiple factors that appear invisible, doing what it takes to get the job done with a single phone call. (First Call Resolution)
- Trustworthy – they want to know they are in capable hands and that promises made will be kept. They want things done right the first time and if something goes wrong, they expect a quick and thorough recovery. They want dependable and accurate service. (Customer Satisfaction)
- Attentive – they want you to provide caring and individualized attention by acknowledging them quickly and politely. They want to be treated with respect and ultimately want their needs; human and business to be met. (MAGIC Principles of Interaction)
- Resourceful – they want you to provide prompt service with creative solutions. They are looking for a flexible approach to solving their problems. (Ownership)

Be sincere by putting yourself in their shoes. Look at any conversation as an opportunity to build a relationship. Be organized in your workspace for a seamless way to accomplish the task at hand more efficiently. Show passion for the job you do and people you encounter including your teammates. Lastly, continue to strive for continuous improvement in yourself and your knowledge.

Diffusing Escalations

The key to diffusing escalations is to understand an unhappy customer is one who called looking for a solution to their problem, but did not get what they were expecting, or the solution did not satisfy their needs appropriately. There are usually two scenarios that inevitably lead to an escalation:

1. Customer asks for a supervisor right off the bat
2. Conversation starts out good then quickly descends to an uncomfortable state where the customer no longer feels valued, heard, or other communication break-down has happened

When a customer asks for the supervisor immediately, work to calm them and try to get them to provide you with the details. Do not transfer them immediately without trying to calm them and bring resolution. You may be surprised at how well you are able to control the call once you try talking with them, instead of at them. Begin by stating the negative rather than waiting for them to do it *"Mr. Smith, I can hear that you are very upset or frustrated at something we have not been able to do for you, is that right?"* Get the customer to agree. This simply act can make the difference as to whether you are perceived as helpful or just another barrier to them getting the resolution they are seeking. You can then follow the rest of the conversation guidelines to work towards a solution. During this call, you must build the customer's trust. Do what you say you will do. Once the customer feels they can trust you, the more cooperative they will be. Regardless of their tone or words, remain as polite and calm as possible. Lower your voice as they raise theirs, and respect their need to vent. If the call becomes abusive, then you can get your supervisor involved right away by letting the customer know it is not necessary to be mean or vulgar, that you are trying to help, but you will get your supervisor as soon as possible.

MAGIC Reminder: Ensure every interaction you have with a customer is focused on what you can control and what you can influence by using customer-focused communication. Keeping the MAGIC Mindset of Service provides customer engagement and relationship restoration.

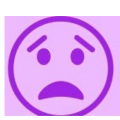
To help you handle tough situations that require finesse in communicating based on personality types, let's look at some communication barriers that might simply need a different approach to be successful.

The Bully – Hardcore bully personalities are hostile, abusive and intimidating. They have to be right and will challenge your authority on every level. They will talk over you, interrupt you, and their vocal tone will be stern, loud, and argumentative.

How to handle with authority and empowerment: First, take a deep breath. Let them rant, express their anger and frustrations. Then draw the line. In a calm, quite, non-argumentative tone, address them by name to maintain control. State your position clearly and do not argue. "*Mr. Smith, I understand your frustration and know this is not the answer you were looking for. I have provided you with the best solution to ______ (restate the issue) that is currently available. There is not anyone here who can provide you with a different answer."*

The Princess – Princess personalities are know-it-alls. Facts are important and used like weapons as it makes them feel empowered and superior.

How to handle with authority and empowerment: Make sure you have accurate facts and information. Capitalize on what they know by asking probing questions because they love to show off and have others appreciate their knowledge. Give them praise, stay calm, and use their knowledge strategically to your advantage. "*Mrs. Dumont, you are correct in the information you found regarding your paycheck hours not being correct. I have pulled up your most recent timecard and see the punch on Friday December 1st at 1:12 PM after your lunch break was not correctly captured as it shows for AM instead. What I can do to correct this is______________. You will see the changes on the next pay period that ends on December 8th with payout on December 15th. If you do not see the corrections, I recommend you______________."*



The Pessimist - The Pessimist complains, whines, and acts defeated. They think no one sees them as valuable or important. They believe the least negative thing is much larger of an issue than it is.

How to handle with authority and empowerment: Bring up the negatives first. Then immediately dismiss them with logic. Direct their attention to the more positive aspects and remain cheerful. "*Mr. Jones, I understand your situation has been difficult and I appreciate you calling and bringing this to my attention. The benefit for your health insurance will not start for 60 more days on March 12th. The good news is that I have confirmed your family is covered with the elections you chose and your wife is set up correctly as your beneficiary."*

The Negator - This person distrusts everyone in power. They believe their way is the only way and they love to say "I told you so!".
How to handle with authority and empowerment: Stay calm and positive but realistic. Delay discussing solutions because they will dismiss everything you say. Stick to the facts and do not argue. Maintain an even vocal tone and avoid small talk.
Once you have a better understanding of the personality types that often cause you to escalate a call, knowing how to counter-act their behavior may help reduce the number of escalations you have and help you become more efficient in your call handling process. Often times, escalations are created out of fear of the customer's reaction to the news we deliver. Understanding how to deliver that news provides you with empowerment and confidence to deliver the information without worry.

Escalation Management

Escalations can be stressful at times, but having a formal process in place with a guide on how to manage certain personality types in an escalated situation will help you manage those times more effectively. While there is not a fool-proof procedure that guarantees a successful resolution every time, there are essential steps you can take to ensure more effective communication. To understand what escalations are, let's review some situations that might require an escalation:

- A call requires additional help beyond what Tier 1 representatives can provide (systems, leadership, T2)
- A customer becomes very irate after being told they cannot get what they want, or they are given a solution that does not help their situation
- A customer calls back regarding a situation where the promised assistance has not been delivered in a timely manner
- A customer is simply difficult to work with
- A representative finds they are unable to successfully communicate
- A customer requests a supervisor because they do not feel their needs are being met

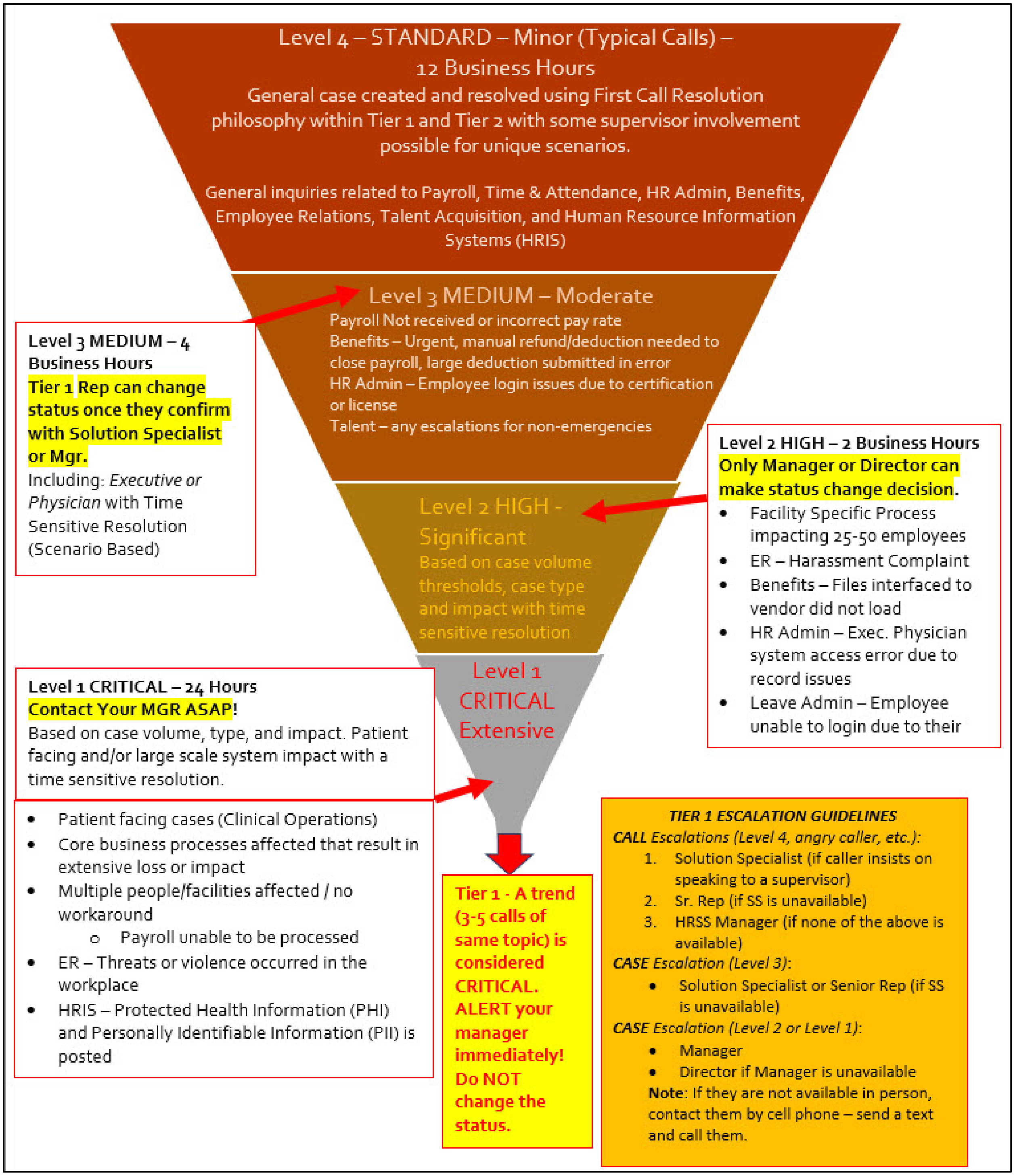
Any number of reasons can demand an escalation. As a Shared Services representative, you want to help the customer and do what you can to diffuse the situation so communication flows more efficiently. Let's take a look at the policy for escalating a call:

1. Use your resources (HRHD, HR Answerlink, One Note, Desk Drops, etc.)
2. Diffuse angry or upset customers using diffusion techniques as discussed in this module
3. Provide answers with authority and confidence (you are empowered to provide the answers)
4. Redirect and refocus the call on the solution provided to the problem they called about
5. For extra help, contact the proper Solution Specialist for help with the topic if you are confused or cannot find the appropriate answer/solution
6. Provide any new information to the customer
7. If the customer demands a supervisor, ask if they mind being placed on hold while you contact your supervisor
8. Contact a SS and warm transfer the call

If the call is one that requires escalation to Tier 2 based on content such as Employee Relations topics, or certain key words as found in the Case Management module, then contact the appropriate department and warm transfer the call.

If the call is one where the customer is calling back after a promise was broken for contact or other issue, contact your manager first, explain the situation, then warm transfer the call as appropriate.

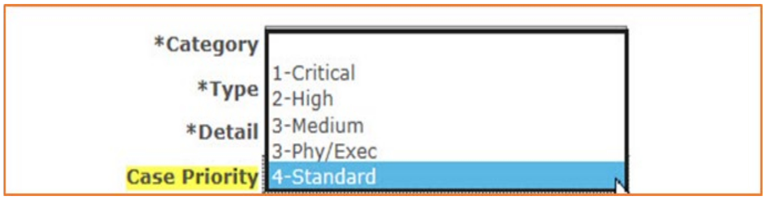
Case Escalation Funnel



Tier 2 CALL escalations:
1. Senior Rep
2. Supervisor
3. HRSS Manager

Tier 2 CASE escalations:
1. Manager
2. Director

View of the Case Priority listing as found on the HRHD Case Page:



MEDIUM & PHYSICIAN/EXECUTIVE Level

Impact case types that require **Solution Specialist** involvement.

**("P/E" designates Physician/Executive line)

Payroll:
- Individual paycheck not received
- Off-cycle check needed due to error on paycheck with benefit deductions and significant impact to employee net pay
- Response to questions regarding specific employees pending a RIF or upcoming sensitive separation
- (P/E) Any benefits related deduction or refund issue that impacts physician net pay

Time and Attendance:
- Response to confirmation of position changes
- LOA hours timesheet adjustment

Benefits:
- Employee at doctor's office with issue
- Large amount of money submitted in error for health insurance creating financial hardship
- (P/E)403B Annual Max

Employee Relations:
- Employee complaining their employer is discriminating against them (see more complete list of examples under ER Reason Code list)
- Settlement issue
- Workplace issues / harassment/time off for substance abuse, etc.
- Communication of RIF activities
- Follow up on questions regarding admin Leave requests
- Consultation request
- (P/E) Authorization to pay non-worked hours

HR Admin:
- Employee or beneficiary death reported
- Changes to Leave begin and/or end dates
- Wrong cost center set up
- (P/E) Job data correction issues

Talent Acquisition:
- Escalations for non-emergency issue
- Wrong relocation allotment amount submitted
- New hire onboarding process errors
- Communication of offers rescinded
- Response to access/security issues preventing HR Admin functions
- (P/E) Transfer PDO Dollars

HRIS:
- Executive / Physician login issues
- System error on timesheet

- Employee unable to login to workforce (payroll Monday)
- Technical issue or "Back-end" issue impacting 25+ employees

Leave Administration:
- Delay in change of LOA status causing off-cycle pay
- Notification of employee not returning from leave requiring separation
- Employee worked hours report for employees with multiple positions across BU's for eligibility
- (P/E) LOA Denied

Compensation:
- Wrong pay rate causing decreased net pay

HIGH Level

Impact case types that require **Manager** involvement (you must speak to them face-to-face).
**("P/E" designates Physician/Executive line)

Payroll:
- When payroll is already in process/closing, or post -payroll close, and Benefit deduction or refund issues (or PDO Issues) are impacting 25+ employee paychecks
- Response to questions on retro compensation changes impacting payroll
- (P/E) Tax question
- (P/E) Response to any escalated inquires

Time and Attendance:
- Time sheet issues regarding LOA

Benefits:
- File did not load to vendor
- Entire net pay went into AHRP
- (P/E) Execucare question
- (P/E) Response to any escalated inquires

HR Admin:
- Executive cannot log in due to record issue
- No pay due to wrong hire date
- (P/E) Missing name change

Employee Relations:
- Harassment complaint
- Instructions to hold pay due to non-returned high dollar equipment (i.e. keys, etc.)
- Involuntary and RIF related separations
- ANY Physician/Executive issues

Talent Acquisition:
- VP system hire issue
- Jobs posted with executive contact or salary information
- Wrong sign-on bonus amount (only applies to current pay period)
- Provide details to process failed new hire/transfer
- Response to information request on new hires needing manual entry with past/current hire/transfer date
- Response to case regarding incorrect hire/position correction (position attributes validated during intake)
- (P/E) Recruiter/transfer questions

HRIS:
- Jobs posted with executive contact or salary information

- No one can access Workforce but can access the HUB
- Timekeeper access enabled by system access denied error message (only applies to payroll Monday)
- HRIS Benefit issues that impact 100+ employees
- Correction to employee record requiring retro that impacts compensation the Friday or Monday prior to a payroll

Leave Administration:

- RTW did not get input so employee cannot log in
- Employee working without clearance; hours unable to post
- Return from leave/ leave dates record changes requiring entry near payroll close date
- LOA consultation request

Compensation:

- Response to questions on retro compensation changes
- Create job codes for urgent/time sensitive requests
- Provide salary change information for urgent/time sensitive requests
- Creating a new job code for Exec/Physician roles or retro manual hires

CRITICAL Level

Impact case types that require **IMMEDIATE Manager or Director** involvement (you must speak to them face-to-face – if none available contact manager by cell phone first, then move to Director's cell phone if no answer).

**("P/E" designates Physician/Executive line)

Benefits:

- (P/E) Confirming receipt of faxed or scanned in Benefits documents

Payroll:

- Pay not received or unable to be processed (facility specific or multiple locations)

Employee Relations:

- Employee making threats of violence in the workplace

HRIS:

- Protected Health Information (PHI) and/or Personally Identifiable Information (PII) is exposed outside of approved access
- Clocks not working/offline punches not making it into timesheet
- System down (Taleo, Smashfly, Hirevue)

Leave Administration

- (P/E) Confirming leave type, dates, paid/unpaid

Compensation

- (P/E) Confirming salary plan information the impacts Benefit program assignment

SHOW YOU KNOW

Let's take the previous scenario and apply what we have learned about taking ownership and the personality types that create possible escalations. Fill in the table below for three personality types discussed. Think of how these personalities might interact with a Medium, High, or Critical impact level. What differences would you expect? Discuss with your group.

Personality Type	Key Behaviors	How to be Effective

Delivery of Bad News

No matter how much you strive for flexibility in call situations, there will be times when you are simply unable to meet a customer's request. As a result, part of your job will be to convey information that may be unwelcome. In a situation like this, your goal is to ensure the customer has been fully informed and still thinks positively about the Contact Center and Shared Services.

Customers want clear and accurate information. The first step is to be clear about what you are unable to do and why. When describing the situation, remember to use MAGIC and avoid expressions or words that have the potential to alienate customers and create barriers between you and customer such as:

- It's not my job
- But
- No
- I can't do that
- I can try
- It's against our policy

MAGIC Reminder: Directive styles of communication are characterized by being one-way and focused on facts, logic, and results. Supportive styles of communication are characterized by being two-way and focused on relationships.

When you hear that the information provided is unwelcome, show you value the customer's feelings and viewpoint with empathy:

- "This must be very frustrating…"
- "I understand what you are saying."
- "If I were in the situation, I would be disappointed too."
- "I understand. It's a very difficult situation."

Refocus the conversation on what you CAN do. Whenever possible, swiftly move to a list of the options you can offer the customer. Options make the customer feel more in control and shows you really want to help. Often times, options speak louder than the "no".

- "May I suggest something?"
- "You may want to consider…."
- "You might be interested in…."
- "If you like, I will be happy to…."
- "Will ____________work for you in this situation?"

In some cases, there may not be any options to offer. When that happens, offer information that may enable the customer to meet his or her needs another way, or refer the customer to another source of help. The idea is to leave the customer feeling you are doing the best you can to help.

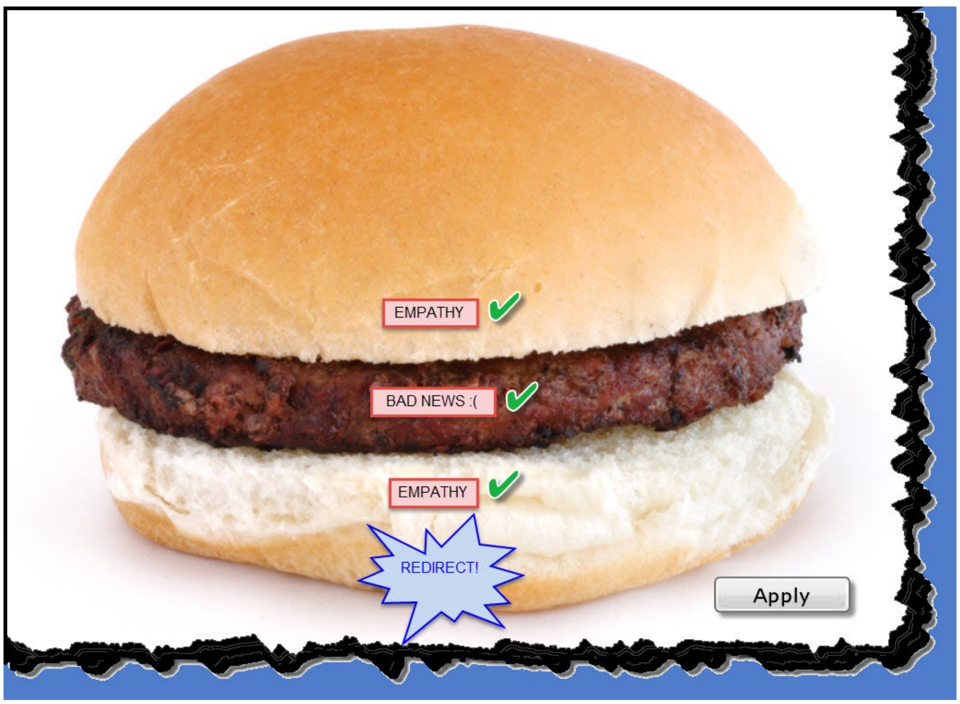
The customer may find it puzzling that you are unable to meet a request and could have additional questions for you. Take this opportunity to confirm the customer's understanding.

- "What other questions do you have?"
- "Is there anything I can explain for you?"
- "Have I answered all of your questions?"
-

SHOW YOU KNOW

Let's review the MAGIC way to deliver bad news using the Bad News Burger approach.

1. What are the steps to the Bad News Burger? **(Empathy, Bad News, Empathy, Redirect)**
2. How could a Bad News Burger be used in the previous scenario? **(Example statements)**
3. What is an example of a MAGIC apology? **(One that accepts accountability when the organization has done something to cause the situation)**
4. Review scenario and put this into action using the BNB philosophy.



Facilitator Notes

Directive	**Provide**	**Timing**
Discuss proper way to handle the situation in support of content covered. This time, the customer should choose one of the 4 customer types listed above as their personality, and the representative will use the suggested methods to work through the situation.	*Scenario:* Customer is calling because she needs to talk to someone about her health benefits. She has a new baby. She is upset because the baby will not have insurance until January due to having to wait until open enrollment. Additional information: baby is 2 months old. Employee claims she was never made aware of this policy and wants a supervisor. Customer: Mary Hunt Birthday: 1/9/86 Bad News: If the baby is older than 30 days, the employee must wait until Open Enrollment and will not be able to provide insurance until January 1 of the following year. Solution= Having a child	20 minutes: 15 minutes to work through the call process.
Use flipchart to capture process pieces well done	Flipchart	5 minutes to discuss with class
Use laptop	Show Solution	

Summary

This module has taught you how to have conversations with your customers in ways that are effective and satisfying. Conversations require us to behave and speak in ways that convey interest in the customer’s situation, respect and acknowledgment of their emotions, and a willingness to do everything in our power to help solve their problems.

Escalations, when handled effectively, can often times be avoided. Understanding various personality types and taking ownership of the call, go a long way in customer satisfaction. Learning how to deliver unfavorable news and being confident in the information provided, can also help the customer understand that even though the answer may not be what they were looking for, they will know you have done the best you could. Always try to provide additional education or other options that might also help in their situation.

Taking ownership, applying empathy for all situations, and working towards have more effective conversations with difficult personality types provide the customer with confidence that you are doing everything you can to help them, even if the news is unfavorable. This provides higher customer satisfaction, and give you a sense of accomplishment.

Revision Table

Version	Date Completed	Reviser
Draft	10/10/16	MChetwynd
Draft 1.1	11/8/16	MChetwynd
Draft 1.2	12/6/16	MChetwynd
2.0	12/20/16	MChetwynd