

Handling Difficult Customer Interactions

35-minute instructor-led session | Copperleaf County Public Services

COURSE AT A GLANCE

Audience	Front-line staff who handle walk-in, phone, or service-counter questions.
Length	35 minutes; allow 40 minutes if discussion is active.
Materials	Training deck, participant handout, pens. No special technology beyond a display.
Outcome	Staff can use Hear -> Clarify -> Move to respond without arguing, overpromising, or hiding behind policy language.
Assessment	Three in-deck decision prompts plus a four-item participant knowledge check.

FACILITATOR STANCE

- Keep the course practical. Ask for examples, but do not turn the session into a complaint forum.
- Do not teach employees to absorb abuse. The framework is for difficult interactions, not threats or unsafe behavior.
- Use the organization's real escalation rules when adapting this sample for production.

TIMING MAP

Slides	Focus	Time
1-3	Set the goal + reframe the situation	7 min
4-7	Teach Hear -> Clarify -> Move	14 min
8-9	Pair activity + debrief	10 min
10	Knowledge check + close	4 min

BEFORE PARTICIPANTS ARRIVE

- Place the two-page handout at each seat or distribute it digitally.
- Know the local escalation path and one real example of a limit employees cannot override.
- If possible, ask the manager in advance which customer situations create the most friction.

Slide-by-slide notes

Slides 1-7 | Teach the method before asking participants to practice it.

1

Handling Difficult Customer Interactions 1 min

SAY: "Today is not about making every customer happy. It is about making the next useful move clearly and professionally."

DO: Point out that the organization and scenario are fictional in this sample.

2

A difficult interaction needs three things 3 min

SAY: "People usually need to feel heard, know what is true, and know what happens next. Those three needs become our three moves."

DO: Ask: "Which of these tends to disappear first when the counter gets busy?"

3

The interaction is difficult 3 min

SAY: "Labeling the person as difficult makes us defensive. Label the pressure, emotion, or limit instead."

DO: Invite one quick example of a difficult situation - not a story about a difficult person.

WATCH FOR: If discussion turns into customer-bashing, redirect to the conditions employees can influence.

4

Hear. Clarify. Move. 2 min

SAY: "The sequence matters. Correct information delivered too early can sound like dismissal."

DO: Trace the three moves left to right.

5

Hear 4 min

SAY: "Hearing is not agreeing. It is showing that you understand the concern before you explain."

DO: Ask participants to underline one phrase on the handout they could actually say in their own voice.

6

Clarify 4 min

SAY: "Clarify the need and the facts. Do not make the customer sort through policy language with you."

DO: Emphasize the sentence: "Here is what I can confirm, and here is what I still need to check."

7

Move 4 min

SAY: "A useful next step may be a solution, an alternative, or an escalation. What matters is that it is real."

DO: Ask for one example of an outcome staff cannot promise.

WATCH FOR: Do not let "escalate" become the default response to emotion alone.

Practice, debrief + answer key

Slides 8-10 | Turn the method into a decision employees can make under pressure.

8

Activity: The Third Visit 6 min

SAY: "In pairs, write one Hear sentence, the Clarify question you need answered, and the next step you can honestly promise."

DO: Give pairs 4 minutes. Then ask two pairs to share.

WATCH FOR: Participants may jump straight to fixing the missing document. Ask what must be clarified first.

9

Same policy. Better conversation. 4 min

SAY: "Notice that the more useful language does not change the rule. It changes how clearly and respectfully we carry it."

DO: Debrief using three questions: Did the resident feel heard? Did we separate facts from assumptions? Did we promise only what we control?

10

Knowledge check + close 4 min

SAY: "The method is simple on purpose. Under pressure, you should be able to remember the next move."

DO: Have participants complete the four-item check on the handout. Review answers aloud.

ACTIVITY DEBRIEF - STRONG RESPONSE

HEAR	"You were told this was complete, and now you have had to come back again. I can see why you are frustrated."
CLARIFY	"Let me check whether the document was never received or whether it is attached to a different case before I tell you what has to happen."
MOVE	"Once I know which of those happened, I can either correct the case here or tell you exactly what is still needed and who can resolve it."

KNOWLEDGE CHECK ANSWER KEY

1 — B | 2 — A | 3 — B | 4 — B

Completion standard: 3 of 4 correct. If a participant misses Question 4, review the organization's actual escalation rules before they return to customer-facing work.

ADAPTATION NOTE

This sample demonstrates the structure, facilitation, practice, and assessment of a complete instructor-led session. Client work is tailored to the organization's actual policies, escalation paths, systems, terminology, and common customer situations.