

Handling Difficult Customer Interactions

Quick reference + practice worksheet | Copperleaf County Public Services

The goal: make the next useful move without arguing, overpromising, or hiding behind policy language.

HEAR Help the person feel heard.	CLARIFY Make the situation clear.	MOVE Give a useful next step.
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1 HEAR - BEFORE YOU EXPLAIN

- Let the person finish the first version of the concern.
- Name the concern in neutral language: "Let me make sure I have this right..."
- You can acknowledge frustration without agreeing that the complaint is correct.

2 CLARIFY - BEFORE YOU SOLVE

- Ask what happened, what is needed today, and what has already been tried.
- Separate what you know from what you still need to check.
- Explain the actual limit in plain language - not a paragraph of policy.

3 MOVE - BEFORE THE INTERACTION ENDS

- If you can solve it: say what will happen next and when.
- If you cannot: state the limit, then offer the closest legitimate option.
- Escalate when authority, safety, policy interpretation, or repeated failure is beyond your role.

USEFUL LANGUAGE

Instead of...	Try...
"Calm down."	"I can see why this is frustrating."
"That is the policy."	"Here is the limit I have to work within."
"You will have to come back."	"Here is the next step, and what you will need."

Practice: The Third Visit

Use Hear -> Clarify -> Move to plan your response.

SCENARIO

A resident is at the service counter for the third time about a permit. Last week they were told the file was complete. Today the system still shows one missing document. They say:

“I have already done this twice. I took off work again. Somebody here needs to fix it.”

You can see the missing-document flag, but you cannot tell whether the document was never received or was attached to the wrong case.

PLAN YOUR RESPONSE

HEAR	What would you say first? _____
CLARIFY	What do you need to find out? _____
MOVE	What next step can you promise? _____

QUICK KNOWLEDGE CHECK

1. A customer repeats the complaint while you are explaining. What should you do first?

- A Give the policy again B Hear and summarize the concern C Escalate immediately

2. You are not sure whether an exception applies. Which move comes next?

- A Clarify what you know and what must be checked B Guess based on experience C Promise to fix it

3. The answer is no, but another legitimate option exists. What should you do?

- A End the conversation B Explain the limit and offer the option C Say “that is policy”

4. When is escalation appropriate?

- A Whenever someone is upset B When the issue exceeds your authority, safety, or policy role C Only after a supervisor asks

My one takeaway: _____