

# 3 "R" De-escalation Method for Contact Center Agents

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*With Customer Service and De-escalation Expert Myra Golden*

***Welcome to today's webinar! We will begin shortly.***

# Welcome to Today's Webinar!

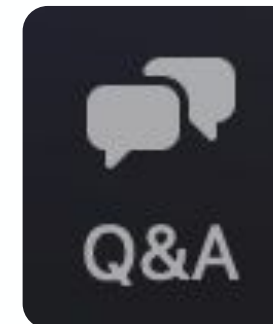


## Lonnie Johnston

Senior VP of Customer Success @ Balto  
*Webinar Host/Moderator*



Today's session will be about **45 minutes** with time for **Q&A**.



Use the **Q&A button** on your screen to submit questions.



All registrants will receive the **video recording** and **slides** following the broadcast.

# Today's Speaker



## **Myra Golden**

Founder, Myra Golden Seminars, LLC

- Long time speaker and training partner to many of the world's biggest companies (McDonald's, Coca-Cola, Frito-Lay, Walmart, Verizon Business, and many more.)
- Bachelor's degree in psychology and master's degree in human relations.
- As Global Head of Consumer Affairs at Thrifty Car Rental, she was named Top 100 Rising Star by Travel Agent Magazine for leading her team to unprecedented customer recovery and customer loyalty in the hospitality industry.

# Kmart

H R

**Where did  
Beverly go  
wrong?**

# De-escalation

**I base my  
de-escalation method on  
4 principles.**

Based on the  
research.

- 1. The issue is not the issue**
- 2. How the issue is handled becomes the issue**
- 3. For every action, there is an equal and opposite reaction** *(Isaac Newton's Third Law of Motion)*
- 4. Customers push back:**
  - They don't trust you*
  - Fear something*
  - See you as a threat*



**De-escalation:**

**Bring down the  
temperature, Contain the  
situation, or resolution**

Our focus:

Right-brain  
transfer

Redirect intensity

Restore

confidence

# 3R DE-ESCALATION METHOD

Recognize

Reframe

Resolve



Step 1:  
Recognize

# RECOGNIZE

Key Action  
Number 1

**Why:** Recognizing the person's concern helps you preempt escalation and move the person from the emotional right-brain to a focus on resolving the issue.

**How:** One sentence to recognize the inconvenience:

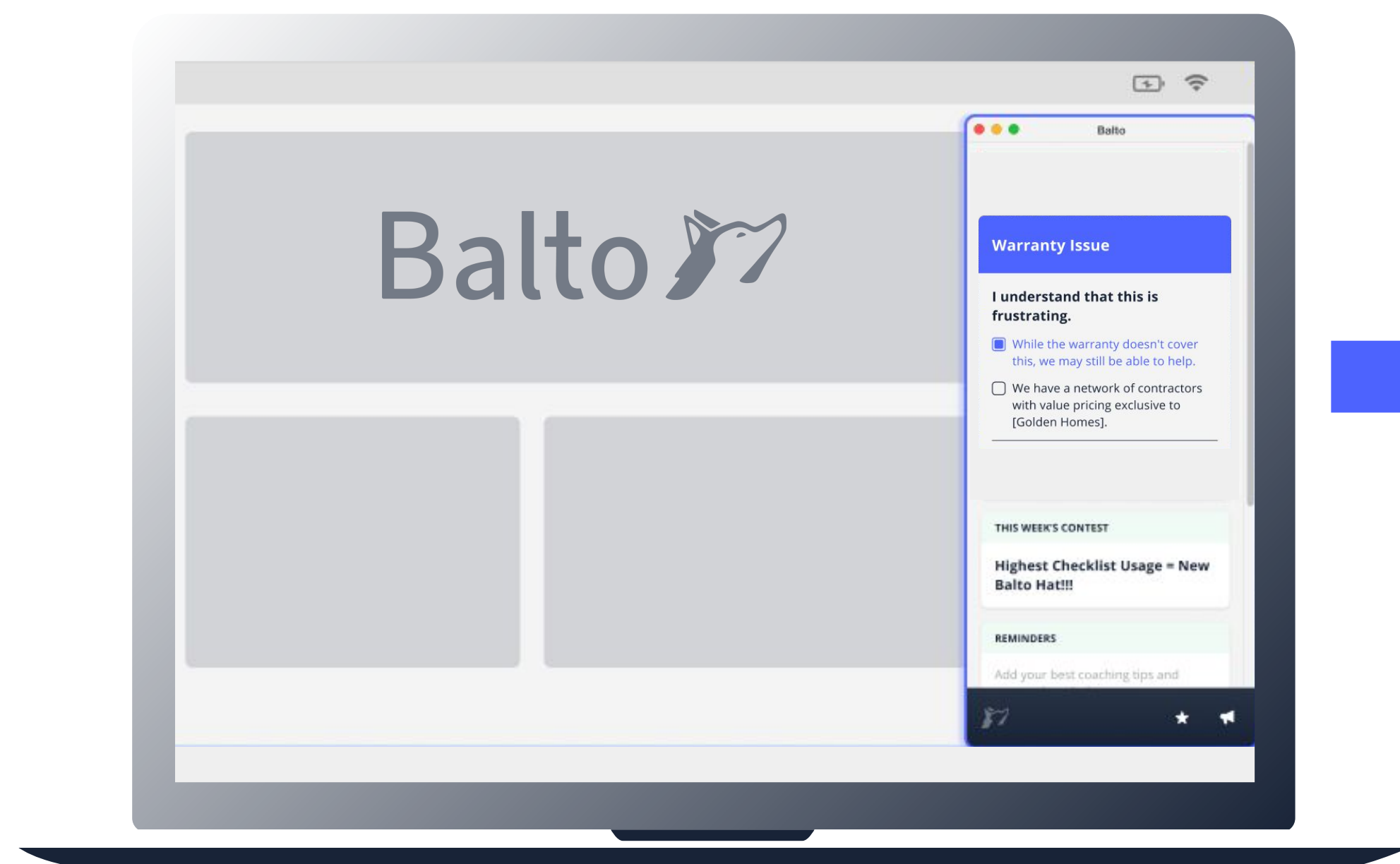
*"I realize this is frustrating for you."*

*"I can see your point on that."*

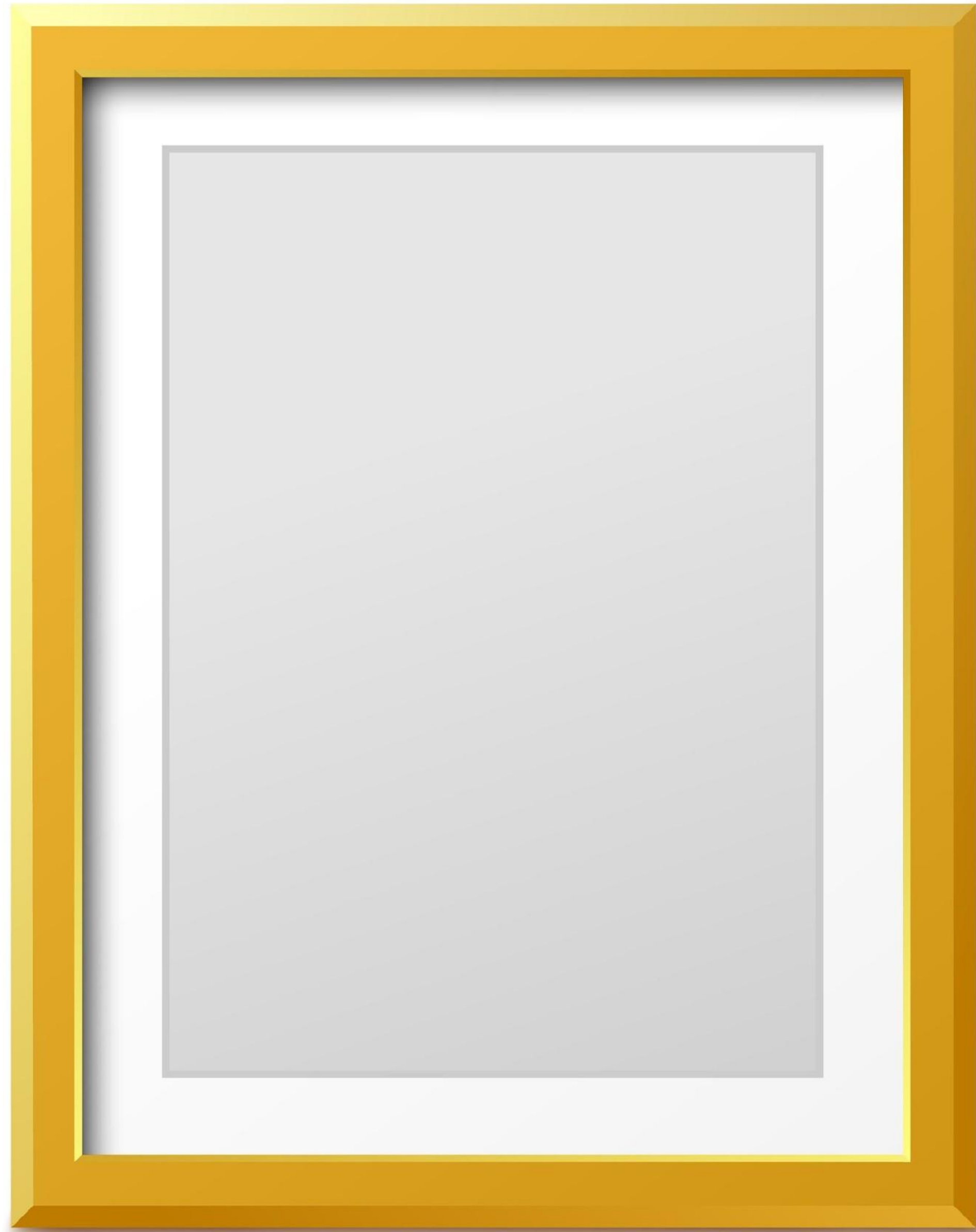


# RECOGNIZE

Example:

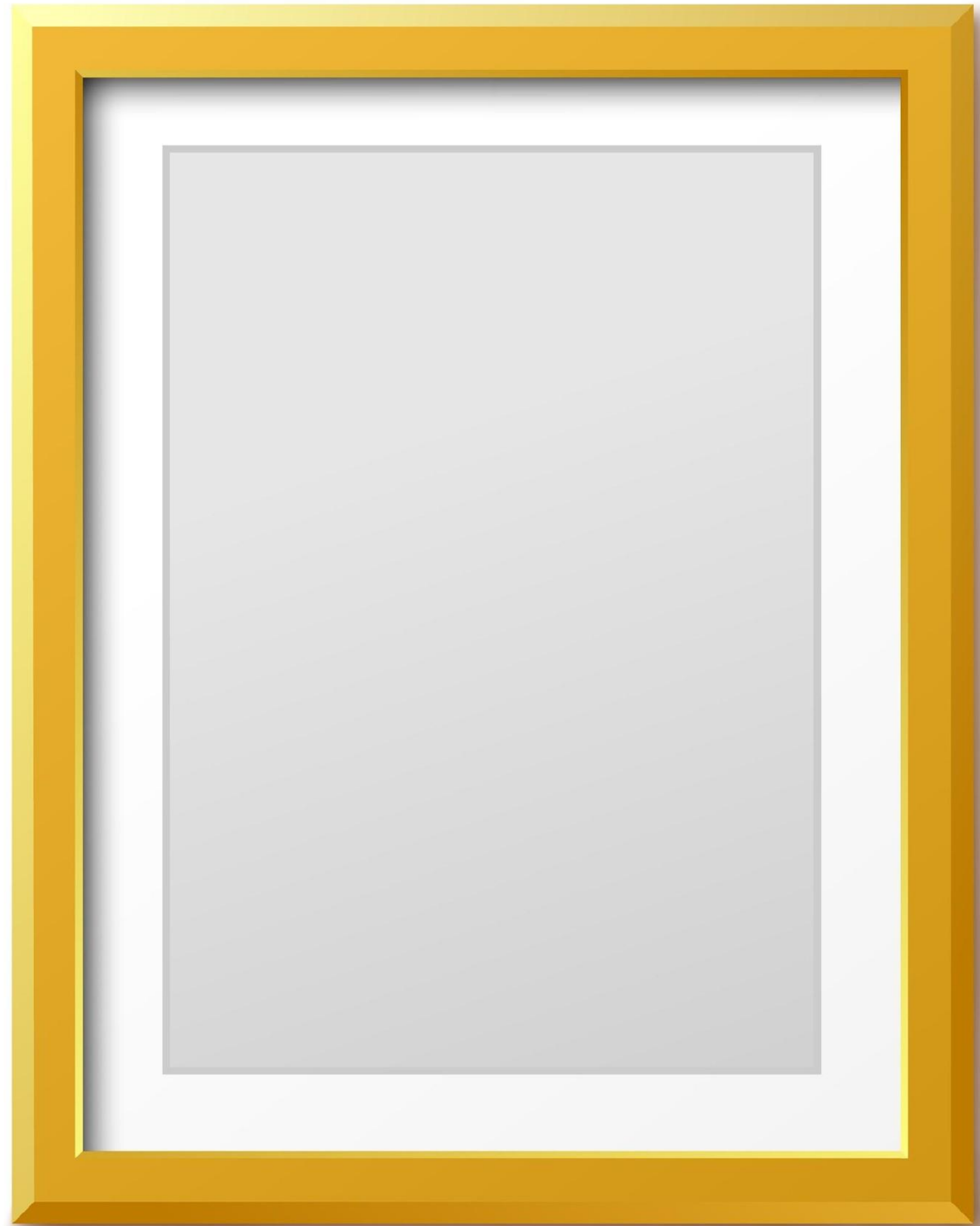
A chat interface on a dark blue background. At the top, a customer named James sends a message: "I can't believe this isn't covered by the warranty!". Below this, a support agent's response is shown in a blue-bordered box. The response starts with "Warranty Issue" in a blue header, followed by "I understand that this is frustrating." and two radio button options: "While the warranty doesn't cover this, we may still be able to help." (selected) and "We have a network of contractors with value pricing exclusive to [Golden Homes]". At the bottom of the response box, it asks "Is this helpful?" with thumbs up and thumbs down icons. A small circular profile picture of the support agent is visible in the bottom right corner.

**Adopt & Apply**



**Step 2:  
Reframe**





Finding Common Ground  
Optioning  
3W  
Priming

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# REFRAME

Find common ground



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# REFRAME

Optioning can be a powerful reframing tool.



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# REFRAME

*Positively position the issue*

The **3W Method** is a **Powerful Reframing Tool**



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**THE TIME I HAD TO  
GIVE BAD NEWS AND  
THE LESSON I  
LEARNED.**

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**HERE'S WHAT WE KNOW  
HERE'S WHAT WE'VE DONE  
HERE'S WHAT'S NEXT**

**THE 3W METHOD**

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**THESE STEPS  
WORKED ON MY  
HUSBAND.**

**Here's what we know:** The accident happened in our parking garage at 7:42 pm. The driver was in a white Honda Civic, license #. He sped off and left the scene.

**Here's what we've done:** We've filed a claim with our loss-prevention team. We have two eyewitnesses. We have filed a police report with the Austin Police Department.

**Here's what's next:** You also need to file a police report. You need to notify both your insurance company and your rental car company. Your insurance company will go after the driver.



**Adopt & Apply**

**REFRAME**

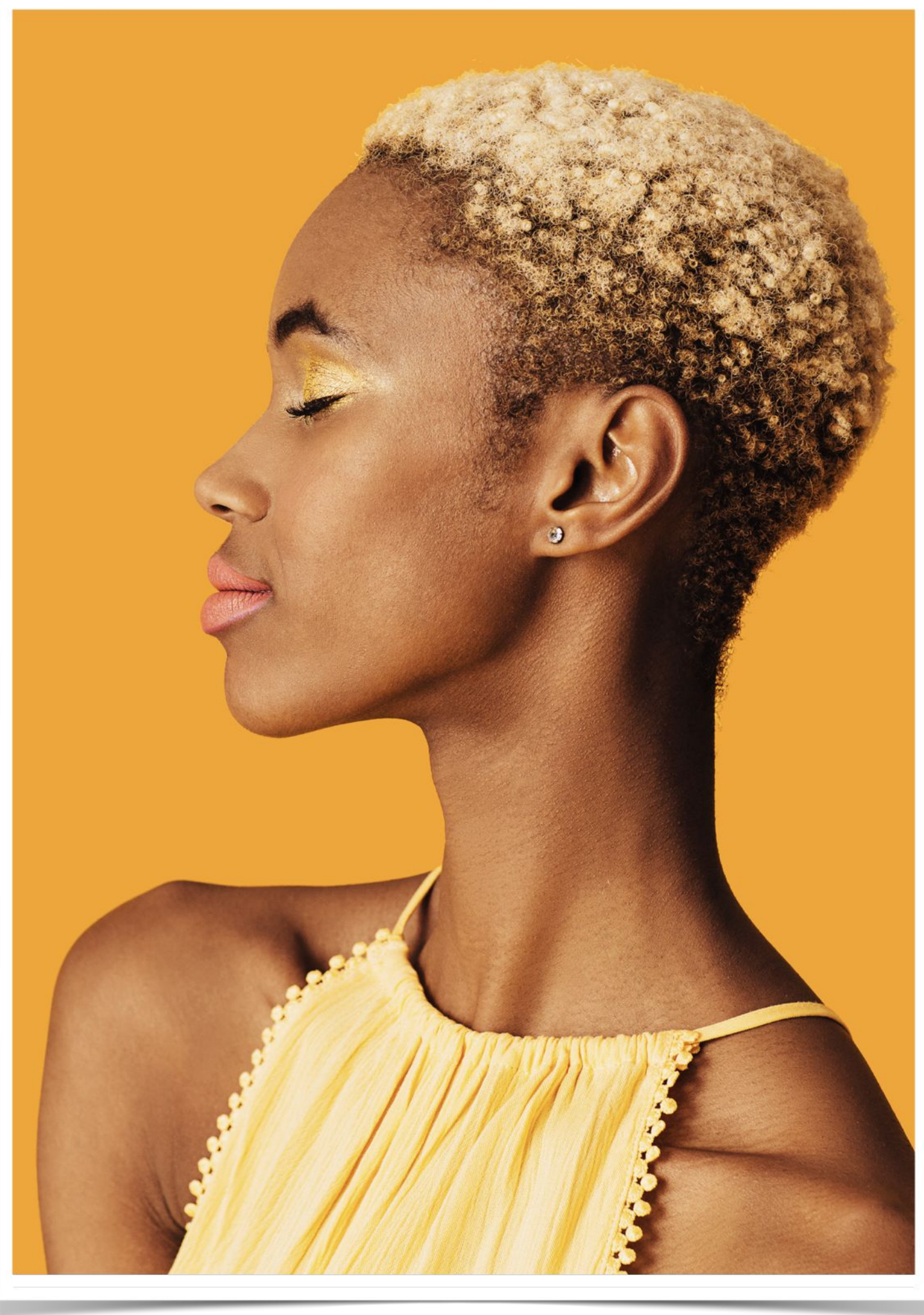
# Psychological Priming



**PRIMING**

H\_\_R

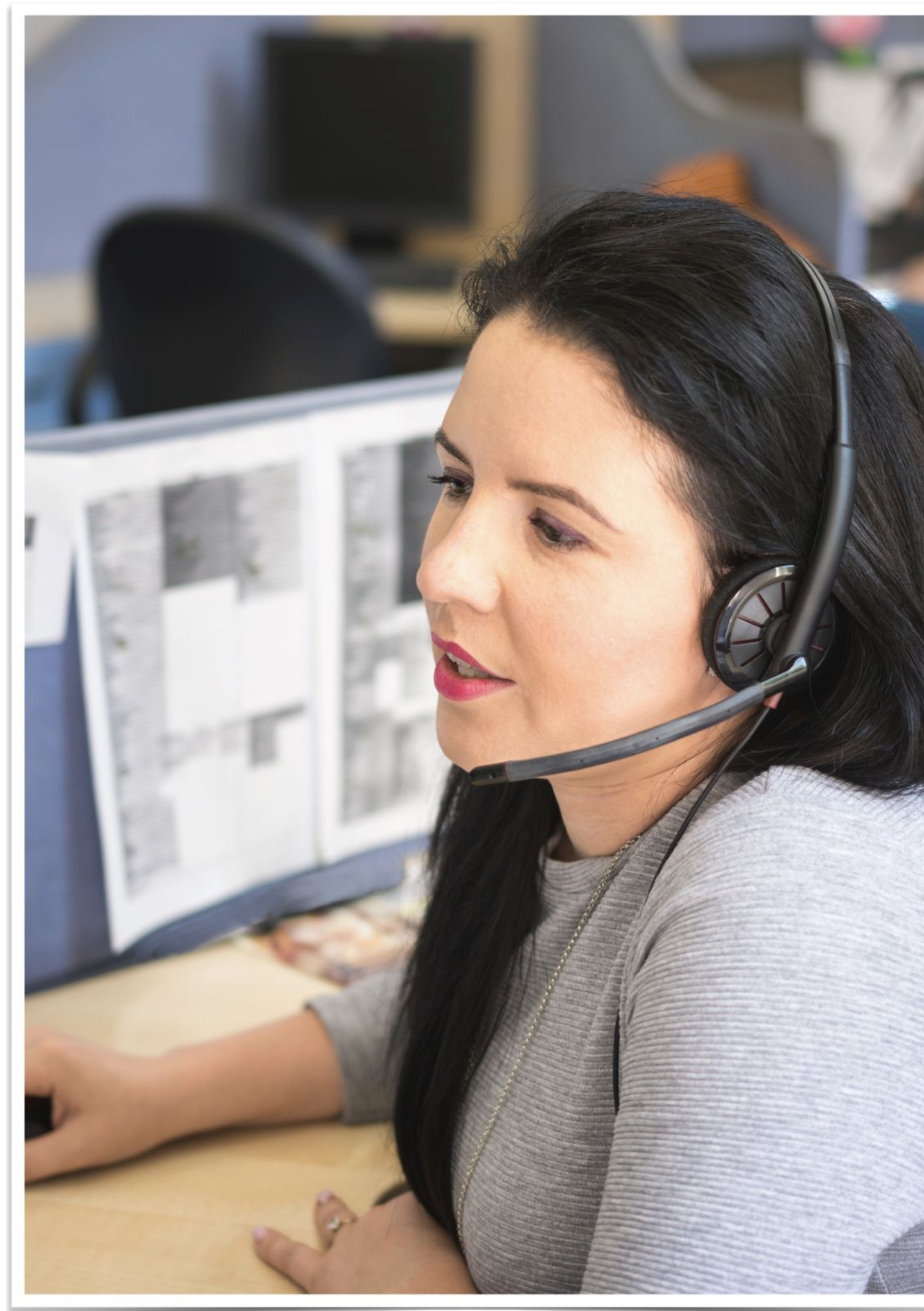




- Image
- Prop
- Words

# Priming with a utility client

*“As a solution, I have **two suggestions**. First, **you need to talk to your landlord**. Tell them there's a debt on the meter and that you can't turn on water. See if they'll work something out for you. The **second option**, and **I'd do this immediately**, **look carefully at your lease** to see if any clause **protects you** in this situation.”*



*"The debt is attached to the meter. Regardless who accrued the debt, ABC Utility won't turn on water until the bill is paid."*

*“As a solution, I have two suggestions. First, you need to talk to your landlord. Tell them there's a debt on the meter and that you can't turn on water. See if they'll work something out for you. The second option, and I'd do this immediately, look carefully at your lease to see if any clause protects you in this situation.”*





Step 3:  
Resolve

# RESOLVE

MOVE TO CLOSURE

Guide to/explain next steps

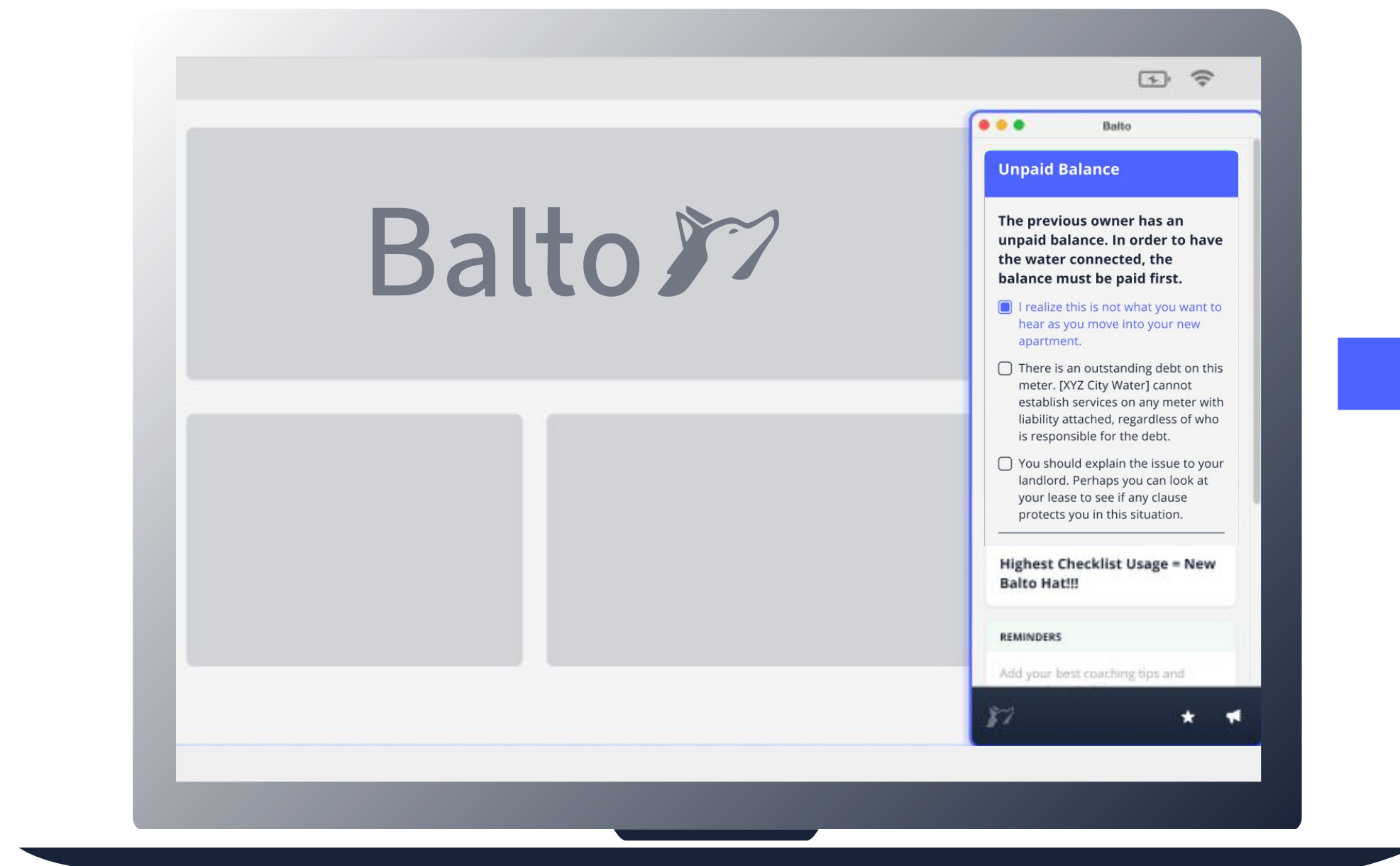
Assure the person there's a solution



Or, resolve



# RESOLVE

Example:



 **James**  
#\$\$@&! I just moved in, that's **not my fault!** 

### Unpaid Balance



The previous owner has an unpaid balance. In order to have the water connected, the balance must be paid first.



- I realize this is not what you want to hear as you move into your new apartment.
- There is an outstanding debt on this meter. [XYZ City Water] cannot establish services on any meter with liability attached, regardless of who is responsible for the debt.
- You should explain the issue to your landlord. Perhaps you can look at your lease to see if any clause protects you in this situation.

Highest Checklist Usage = New Balto Hat!!!

REMINDEERS

Add your best coaching tips and

Is this helpful?  

# PREPARING TO DE-ESCALATE



Practice with Your  
Team!

Practice!



**Thank you!**

## Real-Time Guidance Guide Every Call



James  
That's out of **my budget.**

### Budget

Let's see if we can find an option that works with your budget.

Aside from price, how well does the product we discussed match what you were looking for?

✓ I understand. Let's see if we can find an option that works with **your budget.**



## Real-Time Coaching Coach Critical Moments

### Alert

Kelly Kapowski

⚠ Compliance Alert

Chat Stop Listening

Live Transcript

Kelly K. ⚠ 08:14:03  
You're sure to be qualified

Caller  
Are you 100% certain?

Chat

JD × Agent: Kelly K ×

Avoid qualifying over the phone.

8:15 a.m.

👍 Got it

## Real-Time QA Score 100% of Calls

Dashboard

Scorecards Agents Tags  
Demo scorecard x All Midwest x Northeast x Filter

Include managers?

Average scores so far today Export  
Last update: 4:10 p.m.

Agent name	Overall score	Compliance	Opening	Customer service	Resolution	Closing and recap
Midwest	85%	91%	90%	83%	82%	98%
Zach Morris	76%	98%	99%	98%	98%	98%
Kelly Kapowski	85%	85%	91%	61%	79%	90%
Lisa Turtle	94%	94%				
Screech Powers	87%	87%				
AC Slater	93%	93%				
Jessie Spano	91%	82%				
Ben Zion	79%	74%				
Northeast	100%	100%				
Monica Carter	100%	100%				
Mia Franklin	99%	96%				
Bill Nelson	87%	94%				
Marcus Lerman	68%	69%				
William Jackson	98%	99%				
Gavin Whitford	88%	91%				

Agent	Overall	Compliance	Opening
Zach Morris	76%	98%	99%
Kelly Kapowski	85%	85%	91%
Lisa Turtle	94%	94%	84%
Screech Powers	87%	87%	76%
AC Slater	93%	93%	84%
Jessie Spano	91%	82%	92%

# See Balto in Action!

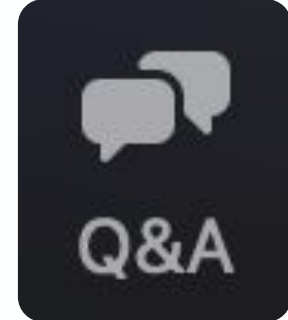
Click the link in the chat to schedule a demo.

Or visit: [www.balto.ai/get-demo](http://www.balto.ai/get-demo)



Next: Q&A →

# Q&A



Use the **Q&A button** on your screen to submit questions.

## Thank you for joining us today!

To learn more about Balto, visit [balto.ai](https://balto.ai)

# GOOD THINGS HAPPEN

WHEN YOU ADOPT & APPLY THESE TECHNIQUES

Transferring customers out of the emotional right brain helps you create calm and makes things easier.

Positively positioning issues through reframe techniques puts you in control and guides interactions forward

Giving bad news using 3W gives you confidence and makes things easier





**Start**  
**Stop**  
**Continue**

**Thank you!**