The Problem Customer/Patron

CI 006 - Consultation

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The Problem Customer:
A Workshop for Personnel Who Meet the Public

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This program is intended as a general model for systematic planning of workshops for any employees who are in regular contact with the public. These are developed as practical, advice-giving, technique-heavy sessions with case materials which have been developed by pre-session interviews with potential participants.

Among those with whom we have worked to help improve their customer, patron, or patient contact skills, are (1) psychiatric ward aides for dealing with the difficult patient, (2) hospital administrative assistants for dealing with the demanding professionals, (3) university staff who deal with students and visitors, (4) city employees who deal directly with public, (5) hospital clerical staff who are in contact with patients, (6) librarians who work with students and the public.

Objectives of the Program.

1. To explore the participant's attitudes toward their contacts with their customers,

2. To help participants develop better skills for interacting with their customers, and

3. To provide the participants with some basic stress management techniques.
Preparation: The workshops can vary in length from 2 to 6 hours depending on what is negotiated with the requesting agency. We prefer to keep the number of participants to 20-24, so that two leaders can do the necessary processing and watch the interaction taking place in small groups to insure that the material is being adequately covered. We have worked with as few as 8 or as many as 120 participants.

Prior to the workshop, meet with a few potential participants to generate a number of specific case problems to be used in the workshop handouts. These meetings aid you in tailoring the materials to the particular group you will be working with, and they help you to establish credibility quickly. People are far more receptive to your advice if you can show that you really do know what problems they face daily. (You may find, as we did, that there are problems which you had not an inkling of. For example, public librarians deal regularly with homeless citizens - "bag ladies" - during the winter months. We had no idea during our planning sessions that this concern was a common one till we had spoken with librarians.);

Starting the Workshop

After the introductory comments from the leaders, subdivide the group into smaller groups of 4, 5 or 6 with their chairs arranged in circles. We prefer to have people working in the groups who are new to each other and can offer each other new points of view.

Use your judgement about how much to elaborate each of the following sections and/or exercises. Consider the readiness of the groups, the amount of time given to the
total training session, and the amount of previous contact the participants have had with each other.

After the smaller groups have had time to practice or discuss an assignment, we usually lead a brief processing session so that the small group can share some of their insights with the total group.

The Program

1. **Team Building.** To get the group members warmed up and willing to share, ask them to discuss their favorite "horror" stories about difficult customers with whom they have had to deal. This is an easy assignment that seems to leave the group members feeling comfortable with each other and in a mood to share more.

2. **Overview.** Briefly state the goals of the workshop. Try to show the relevance of the workshop goals to the "horror stories."

3. **Demands of the Job.** Ask participants to discuss expectations of what they thought their job would entail and what they actually found the job to be. This discussion naturally leads to the next topic: their personal beliefs about how they should relate to their clientele.

Note that the mental set may vary greatly depending upon the groups' convictions about relating to customers. Occasionally we find people who have an aggressive mind set toward customers, regarding them almost as enemies. Most often, however, people who meet the public take a mild-mannered rather than an assertive or aggressive approach.
4. **Mild-mannered helper mindset.** Distribute Handout 1, which covers possible self statements, such as "I should always be helpful." Ask the small groups to discuss these items to see which may apply to them. In processing, emphasize the impossible nature of self demands. Elicit additional items from the group members.

5. **Bridging.** In sections 3 and 4 you have been dealing with some attitudinal factors. In section 5 tie those attitudes and beliefs to the real life problems they have on their jobs. Distribute a handout with some of the selected case study problems you generated in your pre-workshop planning sessions with potential participants. (We usually create three such handouts, choosing the case studies for increasing levels of difficulty.) A group of five items like those from the lists given in handout 2, 3 and 4 would be adequate for this exercise. Ask group members to discuss the examples with the following questions in mind:

"How does this problem make you feel?"

"What is your right to feel that way?"

"Is your response likely to help or hinder your handling of the problem?"

"What are some possible actions to take at this point?"

Ask the small groups to share some aspects of their discussion with the large group. This exercise provides a preparation for the material which is to follow.

6. **Levels of dealing with customer problems.** Handout 5 is a presentation of five levels at which deal with client problems. Make the point here that the problems should be dealt with at the lowest possible level of intervention. Exercises for the
remainder of the workshop are intended to help participants practice using the lowest levels of intervention necessary. We feel practice with difficult potential situations or customers makes the worker less likely to over-react in an actual situation because of their internal assurance that they will know what to do. The five levels of intervention are: (a) use attentive listening, paraphrasing and reflection of feeling, (b) use the guidelines for dealing with the angry person (handout 6), (c) state the rules or the limits of the system, (d) use direct confrontation and statement of consequences and (e) bring in the director, the police, etc.

If you have allotted time for additional training at this point, and we recommend that you do, instruct participants in reflective listening. The best sequence seems to be (a) a demonstration by the leaders, (b) some feedback from the total group on their responses to customer statements, and (c) when the group seems to have a feel for how to listen reflectively, practice session using sentence stems (handout 7). So many people seem to have trouble with this exercise that careful monitoring is necessary while they practice in pairs.

7. **The problem customer.** Distribute a new set of customer problems using the ones given in handouts 2, 3, 4, or others prepared for the particular group. This time ask participants to consider the following questions for their discussion in small groups:

1. What is the surface problem? What is the deeper problem?
2. What is your goal in talking to the person? What do you want to make happen?

3. What alternative actions are there for you, and what would be the outcome of each alternative?

4. What is your recommendation?

5. If no solution seems reachable, what kind of back-up is there available to you?

As time allows, have the small groups share their reactions to these questions with the total group.

8. **Rehearsal of alternative responses.** Ask for volunteers to begin a round of actual practice in handling the problems in the second handout. Ask them to speak as if they were in the situation - direct behavioral rehearsal. Circulate to insure that participants actually work on what to say and practice saying it rather than just talking theoretically. Encourage group members to give feedback and suggestions to each other.

   If time allows, distribute a third set of problems, and have a second round of rehearsals.

9. **Stress Management.** Ask group members to discuss those questions related to managing stress: When a day has gone badly, how do you drain off stress?

   Immediately after a confrontation, how do you restore your own balance?

   The goal here is to have participants build a repertoire of tension relieving techniques they already use. Following the discussion and processing, teach some
basic relaxation techniques. We usually demonstrate muscle relaxation and imagery procedures to the group. (This section can run anywhere from 1/2 to 2 hours.)

10. **Closing exercise.** Have the small groups draw some conclusions to share with the other groups about working with the customers on their jobs. Some examples of prior responses:

1. Some customers are very contrary people; we are not responsible for their contrariness.

2. In working with a customer with a problem you save time in the long run if you take time in the beginning to understand the question.

3. It's O.K. not to always be in a good mood.

4. Denying feelings (yours or the customers) will not make them go away.

5. Anger directed at you is not yours to keep, in fact, you probably didn't earn it in the first place.

6. Some days it seems that, had we seen a description of what our chosen work was really like, we would all have become janitors.

7. A number of studies support the idea that personality characteristics such as anger, aggressiveness, and hostility help people survive to an old age. We do wish, however, that they wouldn't add to their years by taking off ours.

8. Besides the criticism, be sure to let yourself hear the thanks and the compliments.
9. The beliefs that "I must always be nice" and "I must always be helpful" cause more backaches than spading the garden.
Handout #1

THE MILD-MANNERED PUBLIC SERVANT MINDSET

What are the impossible ideals that you hold for yourself, the illogical ideas that lead to making yourself miserable?

1. I should always be nice.
2. I should always be helpful.
3. I should always be polite.
4. Everybody who knows me should like me, maybe even love me.
5. To be any good at all, I must be perfect in everything.
6. I should really care about other people’s problems.
7. There’s a good solution to every problem, and if I can’t find it, that’s terrible.
8. I should never get angry.
9. If things don’t go well on the job, that’s terrible, awful, catastrophic.
10. I should worry (excessively) about what happens in my job, because I’m a dedicated professional.
11. I am a bad person if I cannot do all of the above.
12.
13.
14.
15.
Handout #2

UNIVERSAL PROBLEMS FOR CUSTOMER CONTACT PERSONNEL

1. The customer needs information of some sort, but is vague in his description of what he needs. He doesn’t know the right questions to ask to get the information that he needs.

2. An older man with liquor on his breath and some loss of coordination wants you to listen to his tale of woe, of how awful his life is, and how nobody will give him a fair shake. He seems on the edge of becoming belligerent. His message seems to be, "Listen to me or else."

3. A group of younger teenagers are working on a group project for a class and require access to materials in your area. They have been quite loud and several of them seem to want to show off their disdain for creepy adults, of whom they consider you to be a prime example. Ordinary cautions get you no results.

4. As a young woman approaches your desk, you notice that her pupils are dilated; she is staring almost as if she is looking through you. As she talks about God, death, and meaning, she rambles and seems confused. She seems to know you are there, but is not really responding to what you say or how you act.

5. Two black high school students have been particularly noisy and disruptive in your area. You caution them about their behavior. They accuse you of being a racist and say you are picking on them because they are black.

6. For the past several days, you have noticed an older woman with three shopping bags in the lobby of your office. The bags seem to hold magazines, clothes and
bottles. It's cold outside and she seems to be spending the day inside to stay warm. She is dirty and your other customers (patrons) avoid her. As such, she is a disruptive influence upon your services.

7. One of the regular customers has become romantically interested in you and asks for a date. You are not interested for a number of reasons, but he is particularly persistent. He demands to know why you won't go out with him.

8. A very talkative customer is at your desk; the customer is in the middle of a long rambling description of a recent trip. You know the customer to be a very lonely person who has few contacts with others. There are other customers waiting and they are obviously becoming impatient.

9. A customer comes in with a complaint about the service provided by your company. As she talks, tears well up in her eyes and she explains that she is a recent widow and not accustomed to handling problems like these.

10. A young woman returns from the parking lot outside your building and complains of a "flasher" who exposes himself as she was getting in her car. She seems both angry and upset. When you report it to your boss, he seems to think it is funny.
Handout #3

SPECIFIC PROBLEMS: LIBRARY

1. The patron doesn’t know how to use the card catalogue or the photocopier, but seems hesitant about admitting his ignorance.

2. A parent has agreed to help her teenager at the last minute to get a paper ready. The mother is obviously unhappy with the situation, and she is now dropping some of the anxiety and tension she feels on you. The message seems to be, "I'm really quite helpless in this situation...Won't you, with all your expertise, please pull me out? Help me."

3. A little girl has twice before been left in the library. She is quiet and no problem, but the father has failed to pick her up at the closing time. You now see the father dropping her off again.

4. A patron has requested some books which are not readily available for what the patron considers a very important project. You have tried to get the books, but they are still not in. The patron becomes hostile and verbally abusive. He loudly points out your inadequacies as a human being.

5. You have observed the previous scene and later you find a co-worker in the bathroom, badly shaken.

6. A patron wants help with the writing of a speech. He is not accustomed to public appearances and needs a lot of support. He is constantly checking things with you and making large demands on your time.
Handout #4

HOSPITAL STAFF - SPECIAL PROBLEMS

1. You are admitting a 32 year old woman for testing. She has on a clean, though inexpensive, dress and is carrying a white patent leather purse. She asks for an ash tray and begins to smoke. During the interview, who snaps and unsnaps the latch on her purse. Several times you note that she rubs her hand over her forehead. When you ask her to sign the several forms, she takes the pen shakily and says, "I'm so nervous I can't hardly write my name."

2. Mr. Youngs, a 59 year old man admitted with a cervical problem, is about to be discharged from your floor; he is going to be admitted to the Medical Center for surgery in a few days. He is divorced and two of his teen-aged sons live with him. Suddenly, he appears at the desk, saying in a loud voice, "I'd like to know just what the hell is going on here. My clothes are gone. My suit pants and $15 shirt and everything! I mean they're gone. This is the craziest damn place I've ever been in. You're charging me a hundred dollars a day, and I'm telling you my clothes are gone!"

3. You are admitting a 26 year old woman for surgery. She has on cotton slacks and a sleeveless blouse and flat white sandals. Her husband is in work clothes, and he is holding a baby, while she has a 3 year old on her lap. You discover that they have no insurance and that they have an unpaid bill from a previous hospital stay. When you ask for some kind of payment, the husband angrily states, "We don't
have the money, don't you understand that?" The wife begins to cry quietly and says, "I got to have this operation. They thing I might have cancer."

4. You are working with insurance claims, and your telephone rings. The caller is a recently-discharged patient who states that three of the tests on his bill are falsely charged to him--that he never had any such tests. As you are talking to him, he angrily states, "What you people are charging is completely out of reason. I've had this same work done before, and I was charged exactly half as much. You're supposed to be serving the public, but what you're serving is yourself."

5. You are approached by a 45 year old woman that you recognize to be the mother of a former 16 year old patient. She is irate that her daughter requested and was given contraceptive information while in the hospital. She loudly states her opinion that birth control is against God's will and that you have perverted her daughter's mind.
Handout #5

SOME SUGGESTIONS...

In dealing with a situation which threatens to become a problem, try to solve it with the least amount of effort. Check out the dimensions of the problem, and bring out your "big guns" only if it really needs that level of intervention.

Level One. If you are dealing with a confused customer, or one who may not understand the rules and purposes of your service, and if the person isn't angry (yet), try some of the following techniques:

a. Attentive Listening - remain relaxed, nod your head appropriately, keep good eye contact, use phrases like, "tell me more," "and then?," "what have you tried so far?," and "I don't quite understand, can you explain about..."

b. Paraphrasing - a means of showing the patron that you are following and understanding what s/he is saying. You state back the general idea of the patron's last message. Not a direct patronizing, but you may use some of the patron's words to summarize and restate what you have just heard.

c. Reflect the Feeling - make a short statement of what you thing the patron is feeling and expressing. "Looks like you're finding our system somewhat confusing." "You sound upset that you have to do this paper."

d. Be Clear - only after you are sure that you know what the customer wants or needs, etc. Check out your interpretation of what the customer is asking for, and then give what information, directions, reassurance, etc. that you can.
**Level Two.** At this level, the customer is angry or hostile or otherwise actively giving you trouble.

a. See the handout on DEALING WITH ANGRY PATRONS.

b. Use Reflecting Feeling even more strongly. Make responses like, "This must be terribly frustrating for you," or "I can certainly understand how that would make you upset." The point is to acknowledge where the patron is emotionally without feeling defensive or like you need to jump up and do something right this very instant to calm them down. Don't avoid the feelings; recognize them.

c. Don't bother with long explanations or excuses. Be leery of apologies; they probably won't help, and the patron won't pay much attention to them anyway.

d. Keep the discussion on the topic. To do this you may need to sound like a broken record as you repeat the message you need to get across.

**Level Three.** You must intervene; you cannot ignore the situation at all.

a. State the Rules - describe what the system (and therefore you, as its agent can or cannot do. Briefly, clearly.

b. State of Limits - "It's not our policy to..." This may be sufficient for many people, if you say it convincingly and firmly, without feeling the need to explain why it is a policy. Avoid stating it as a personal choice, i.e., "I'm sorry I..."
Level Four. The big guns.

a. Use direct confrontation. "Your behavior is disruptive to

the___________ and the other people here. If you

won't_________, then we must____________________(e.g., call

the police)."

Level Five. The Biggest Guns.

Bring in your director, the police, family services, the FBI or

whatever (and whoever) you have at your disposal. As you know, you

seldom need to use this level of intervention, but for your own

comfort, you should know who to call, how, and at what number. You

need to know what your backing is.
DEALING WITH AN ANGRY PERSON: SOME GUIDELINES

1. **Pay attention** to what the person is saying and seems to be feeling. Pay attention to or notice especially such **non-verbal** cues as tone of voice, facial expression, body posture, etc.

2. **Listen** closely to the person and his/her concerns.

   Listen, and show you're listening and genuine interest (good listening and attending behaviors come in here). You can be interested and empathic even if only for a moment, and regardless or whether or not you agree with what the person is saying.

3. If the person is angry or upset, don't run away from the anger, or try to ignore it.

   Rather than run away from or ignore the anger, let the person know that you know s/he is angry. Give him/her the feeling that you **acknowledge** and respect his anger and upsetness. Most of us really care more that we are acknowledged, that our being angry or concerned matters to someone, than we do about getting our way.

4. Don't try to calm the other person down just to make you feel more comfortable. Remember s/he has some reason that seems good to him/her for being upset. Instead of saying, "Now, now, I'm sure there's some good explanation," you might try, "Boy, that really is a problem, I don't know what we can do about it, but we can sure try." Then get the facts--be sure you get the whole story.
If you try to ignore the anger or the conflict, or even just to dampen it, it will probably grow. If you acknowledge the anger and concern, the patron will probably relax some and see you as an ally.

5. **Don't be defensive.**

Problems or snafus are not necessarily your fault!

Acknowledge the problem and work with the patron to make the system work as best it can. But don't feel like you have to apologize for the world being the way it is. If at all possible, don't pass the buck.
LISTENING PRACTICE

It makes me happy to ...

The best thing that could happen...

It there’s anything I can’t stand it’s...

I would like to be...

The best thing about being female/male is...

The worst thing that could happen...

In a relationship, nothing is so frustrating as...

Sexual intimacy...

I get down in the dumps when...

When I look at myself in the mirror...

There are time when I...

When it comes to the opposite sex...

The part of my body most easily hurt...

It embarrasses me to talk about...