

Facilitation Guide: Call Center Training: De-escalation Techniques

Target Audience: The target audience for this training is any Community Connections employee who works with upset or angry customers.

Learning Objectives:

Terminal Learning Objective:

The learners will be able to:

- Apply the LADDER framework effectively

Enabling Learning Objectives:

The learners will:

- Identify common triggers for escalation in customer interactions.
- Practice using the LADDER framework strategy to use when managing difficult customers

Training Purpose:

The purpose of this training is to support Community Connections employees by providing skills and tools that can be used as they seek to help difficult customers. By providing a sequential framework for call center employees, they will be able to develop a solution to the issues that employees face with the various customers that they communicate with on a regular basis. Community Connections will continue to support employee empowerment with this training, by providing a structure for employees to use when assisting customers, thereby supporting company goals. Effectiveness of this training will be measured by a customer survey to be administered approximately 3 months post training, reflecting Kirkpatrick's Level Three evaluation. The Community Connections goal is to increase customer satisfaction surveys with at least a 10% increase in the Customer Support Solutions category.

Materials / Equipment:

- Computer with internet access for ILT (Can also be adjust to VILT)
- PowerPoint Presentation slides
- Handouts or digital resources on LADDER framework
- Videos
- Interactive scenarios
- Assessment
- Virtual collaboration tools
- Facilitator guide
- Design Document

:

Total Time:

- Approximately 40 minutes.

Link to LADDER framework: [LADDER job aid](#)

Link to Presentation Slide Deck: [Call Center de-escalation Training \(2\).pptx](#)


Producer: Pre-Work	Actions
	<ol style="list-style-type: none">1. Check cameras, internet, recording check, and test out all tech equipment.2. Verify a stable and strong internet connection.3. If Virtual, adjust settings on Teams/Zoom - participants can type in chat, mute participants when entering, test breakout rooms4. Ensure that links to Mentimeter activity are shareable for participants5. Ensure that all videos function as intended, including volume levels.6. Allow facilitator and producer host/co-host permissions.7. Review PowerPoint slides prior to training.
	Notes
	<ul style="list-style-type: none">• Slides 3-5 are the 1st Mentimeter activity• Slides 12-13 are the 2nd Mentimeter activity
Facilitator: Pre-Work	Actions
	<p>Prepare by doing these steps:</p> <ul style="list-style-type: none">• Review the PowerPoint slides and enter your personal information.• Check the attendance/enrollments• Test the PowerPoint, and Teams links• Check functionality of video on slide 13.• Ensure all materials are accessible in the virtual environment, test out the files.• Read the Facilitator Guide and have it open on the desktop• On slide 1 and last slide - Type your name, credentials and 3 professional facts about yourself.• On slide 8 - Add any additional training rules, break times, and other organizational rules• Create in person groups or breakout groups for Practice activity on slides 25-30 that include one person from each type of role they play in the organization. (up to 4 total)• Ensure the link to the assessment is accessible to all live participants.
	Notes

- This training is intended to be approximately 40 minutes. Timing varies based on interactions, input, and questions. Breaks are not scheduled, so adjust to match audience needs.



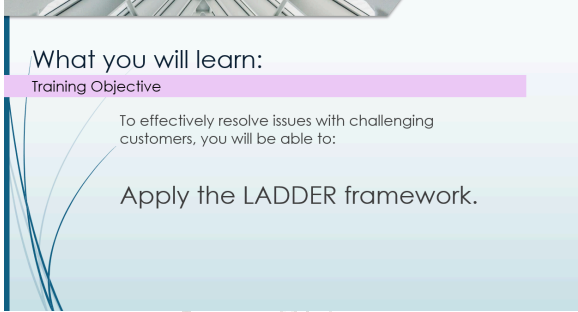
Training Outline

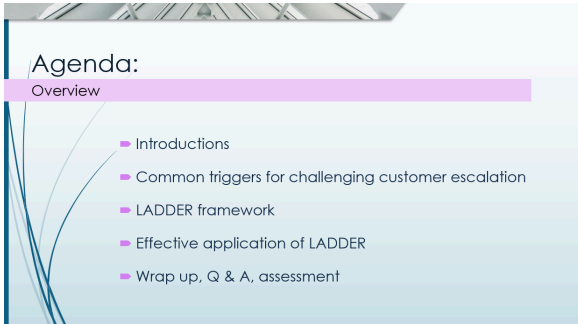
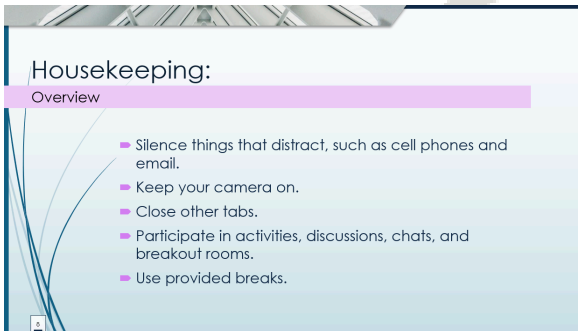

Slide(s)	Approx. Time	Topic / Activity
Slides 1-8	6 minutes	Introduction, agenda, learning objective, housekeeping
Slides 9-14	7 minutes	Review of customer escalation triggers, engagement activity
Slides 15-23	8 minutes	LADDER framework explanation
Slides 24-30	12 minutes	Practice LADDER model with scenario, in groups
Slides 31-36	6+ minutes	Wrap-up, Q & A, summary assessment, thank you
Total Time	40 minutes	

Detailed Guide

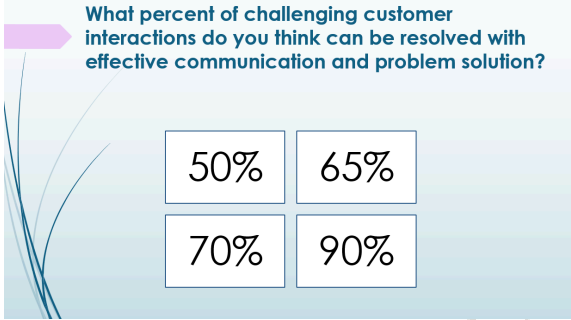
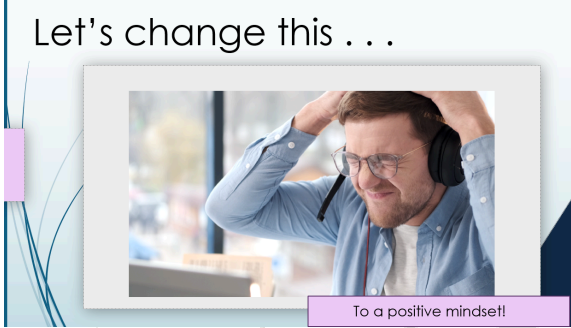
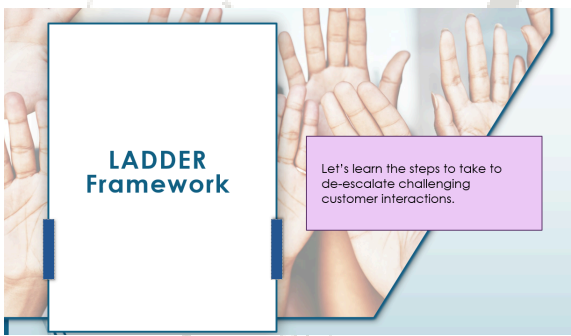
Slide Details	Slide Thumbnail	Facilitator Notes	Producer Notes
Slide 1 (until presentation begins - 1 min)		<p>DO:</p> <ul style="list-style-type: none"> • Display slide as participants arrive • Turn on your camera <p>SAY:</p> <ul style="list-style-type: none"> • “We will begin when everyone is here and ready to go. “ 	<p>DO:</p> <p>Enable chat settings to all participants</p> <p>Adjust settings so that all participants are muted when they enter.</p> <p>Record attendance so that you can align breakout group assignments with those present. Adjust as</p>

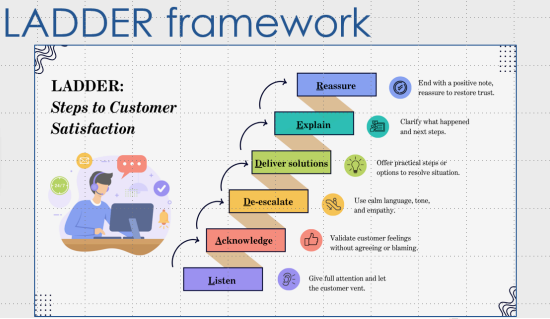
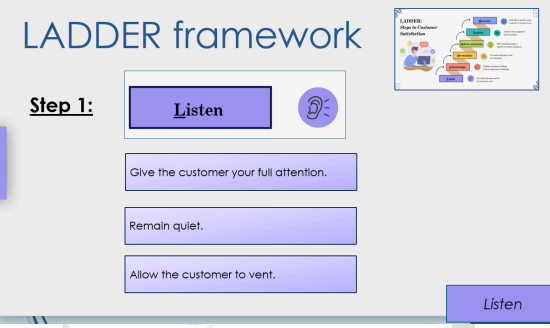
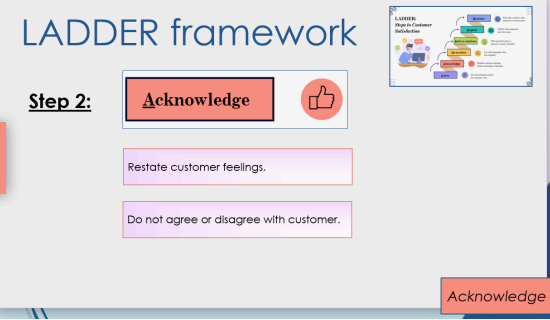
			necessary to meet breakout group requirements.
Slide 2 (0.5 min)		SAY: <ul style="list-style-type: none"> • “Welcome Community Connections center training. Today we will learn a framework to help de-escalate challenging customer interactions. • Remind learners that the session will be recorded and will be available for their review • Inform learners to type questions in the chat 	DO: <ul style="list-style-type: none"> •
Slide 3 (1 min)		SAY: <ul style="list-style-type: none"> • “If you could only eat one type of food the rest of your life, what would it be? Once you click the link, you will be asked for a code. Enter _____. • Once everyone responds to the question, a word cloud will be created with the answers. • Make sure you hit submit at the bottom after entering your answer. • Once you submit, return back here so we can discuss. • You will have 30 seconds, starting now.” 	DO: <ul style="list-style-type: none"> • Provide the presenter with the accurate link for the mentimeter activity • Put activity link into chat: https://www.menti.com/alxn2uyaqcgg • Provide participants with a 30 second count down timer. <p>Click the Mentimeter link to open the Word Cloud so they can see the answers update in real time.</p>







<p>Slide 4 (1 min)</p>		<p>DO:</p> <ul style="list-style-type: none"> ● Highlight key words and trends in responses. 	<p>DO:</p> <ul style="list-style-type: none"> ● Help monitor chat ● Help learners access to activity
<p>Slide 5 (0.5 min)</p>		<p>DO:</p> <ul style="list-style-type: none"> ● The words or themes that appear frequently as participants respond to activity. ● As you highlight key words/trends, engage with audience and get a feel for the dynamics. Be mindful of responses to get a feel for the audience components. 	<p>DO:</p> <ul style="list-style-type: none"> ● Close activity link when activity ends.
<p>Slide 6 (0.5 min)</p>		<p>DO:</p> <ul style="list-style-type: none"> ● Read the objective on the slide. ● Ask if there are any questions about the objective. 	<p>DO:</p> <ul style="list-style-type: none"> ● Click so that animation matches as facilitator reads each statement.

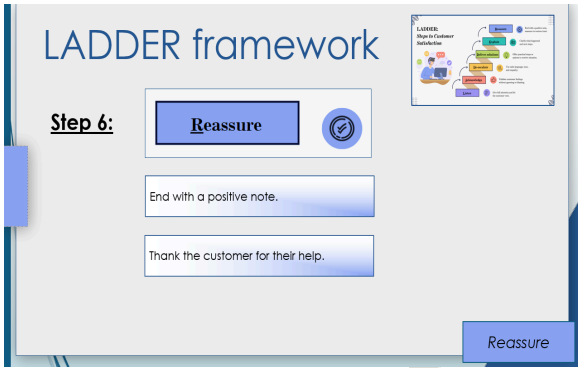
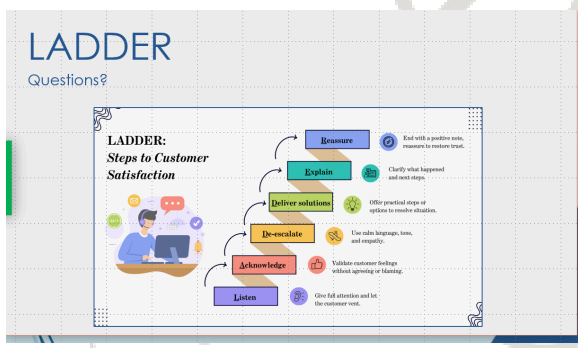

<p>Slide 7 (1 min)</p>	 <p>Agenda:</p> <p>Overview</p> <ul style="list-style-type: none"> ■ Introductions ■ Common triggers for challenging customer escalation ■ LADDER framework ■ Effective application of LADDER ■ Wrap up, Q & A, assessment 	<p>SAY:</p> <ul style="list-style-type: none"> • “This is the map of our plan to reach the learning goals for this training”. <p>DO:</p> <ul style="list-style-type: none"> • Read each statement/part of the agenda to the participants 	
<p>Slide 8 (0.5 min)</p>	 <p>Housekeeping:</p> <p>Overview</p> <ul style="list-style-type: none"> ■ Silence things that distract, such as cell phones and email. ■ Keep your camera on. ■ Close other tabs. ■ Participate in activities, discussions, chats, and breakout rooms. ■ Use provided breaks. 	<p>SAY:</p> <ul style="list-style-type: none"> • “Let’s review expectations for Respecting our learning time.” • Read the bullet points aloud. <p>DO:</p> <ul style="list-style-type: none"> • Ask if there are any questions • Add any additional housekeeping items you would like to include. • There are no breaks scheduled, but adjust as necessary. 	<p>DO: Help monitor chat if questions arise.</p>
<p>Slide 9 (0.5 min)</p>	 <p>Common Triggers</p> <p>Let's revisit things that may cause customers to be upset or challenging to help.</p>	<p>SAY:</p> <ul style="list-style-type: none"> • Read the directions on the screen to help participants begin thinking about common triggers that may add to challenging customer interactions. 	

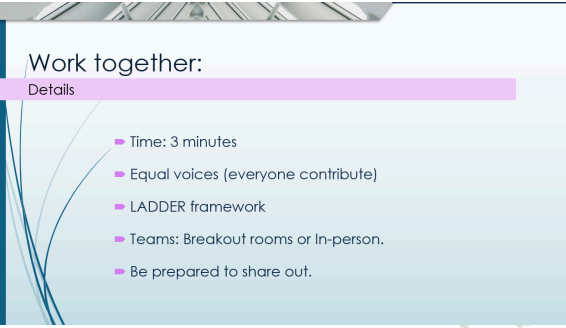
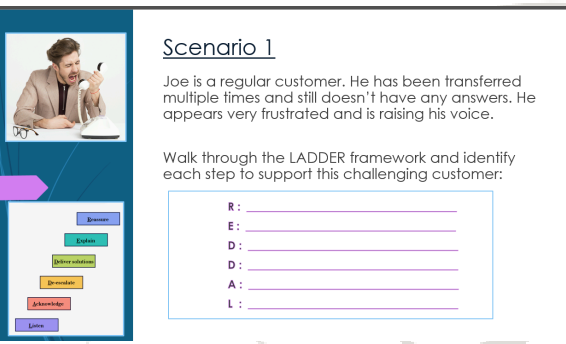
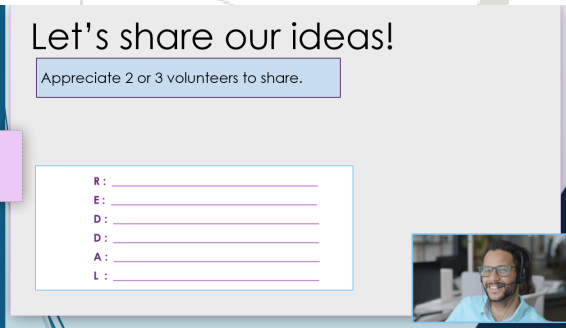
Slide 10 (1.5 min)		<p>SAY:</p> <ul style="list-style-type: none"> Please add your ideas and thoughts to the chat. <p>DO:</p> <p>After 15 seconds, begin reading the chat comments and summarizing thoughts. (Validate participation)</p>	<p>DO:</p> <p>Help monitor chat for trends.</p>
Slide 11 (1 min)		<p>SAY:</p> <ul style="list-style-type: none"> “What causes emotional escalations?” <p>DO:</p> <ul style="list-style-type: none"> Read each prompt as it appears on the screen. Validate if similar to what was shared in the chat. 	<p>DO:</p> <ul style="list-style-type: none"> Support with advancing bullet points if needed.
Slide 12 (1-2 min) Poll or mentimeter		<p>DO:</p> <ul style="list-style-type: none"> Read the question prompt on the screen. Share the answer after the poll closes. (90%) 	<p>DO:</p> <ul style="list-style-type: none"> Prepare a poll with the following values: 50%, 65%, 70%, 90%. Open poll as slide 12 appears. Close poll after 30 seconds. Or use mentimeter: https://www.menti.com/albyix3blp2e https://www.mentimeter.com/app/presentation/alh2o4mwco87s9qjigutp6ry8rq22pmo/edit?source=share-modal




<p>Slide 13 (1 min)</p>	<p>What percent of challenging customer interactions do you think can be resolved with effective communication and problem solution?</p> 	<p>DO:</p> <ul style="list-style-type: none"> • Read the bar chart and summarize the participant answers. 	<p>DO:</p> <ul style="list-style-type: none"> • Present the mentimeter presentation slide. • Or use poll results
<p>Slide 14 (0.5 min)</p>	<p>Let's change this . . .</p>  <p>To a positive mindset!</p>	<p>SAY:</p> <ul style="list-style-type: none"> • “Let’s change any frustration we may have to a positive mindset” (timed with slide interaction.) 	<p>DO:</p> <ul style="list-style-type: none"> • Stop video after 5 seconds.
<p>Slide 15 (0.5 min)</p>	 <p>LADDER Framework</p> <p>Let's learn the steps to take to de-escalate challenging customer interactions.</p>	<p>Say:</p> <ul style="list-style-type: none"> • “Let’s learn the steps to take when de-escalating challenging customer interactions.” 	

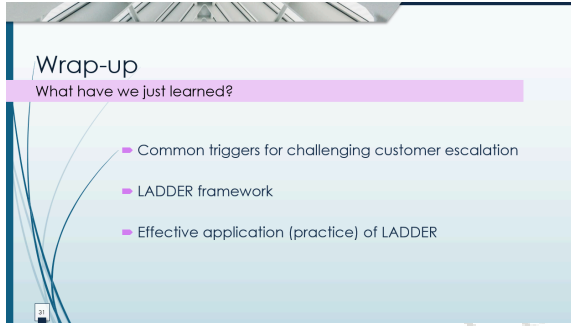
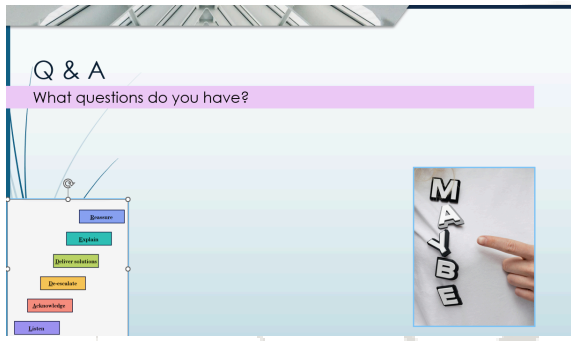
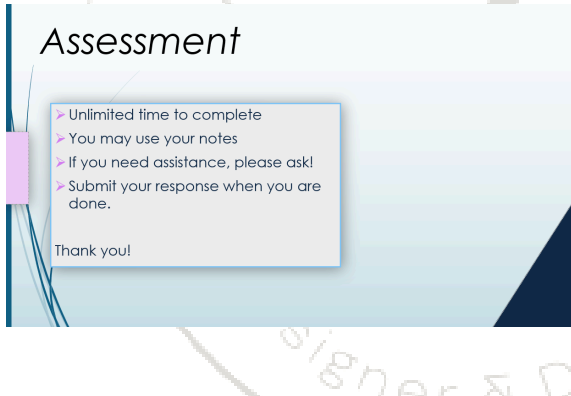
<p>Slide 16 (1 min)</p>	 <p>LADDER framework</p> <p>LADDER: Steps to Customer Satisfaction</p> <ul style="list-style-type: none"> Listen: Give full attention and let the customer vent. Acknowledge: Validate customer feelings without agreeing or blaming. De-escalate: Use calm language, tone, and empathy. Deliver solutions: Offer practical steps or options to resolve situation. Explain: Clarify what happened and next steps. Reassure: End with a positive note, reassure to restore trust. 	<p>SAY:</p> <ul style="list-style-type: none"> Read each description under the Step/icon <p>DO:</p> <ul style="list-style-type: none"> Read thru the words in the graphic (Listen, Acknowledge, De-escalate, Deliver solutions, Explain, Reassure) Expand on each topic as you feel comfortable and relate back to Community Connections customer service goals 	<p>DO:</p> <ul style="list-style-type: none">
<p>Slide 17 (1 min)</p>	 <p>LADDER framework</p> <p>Step 1: Listen</p> <ul style="list-style-type: none"> Give the customer your full attention. Remain quiet. Allow the customer to vent. 	<p>SAY:</p> <ul style="list-style-type: none"> Read each description under the Step/icon <p>DO:</p> <ul style="list-style-type: none"> Read thru the words in the graphic (Listen, Acknowledge, De-escalate, Deliver solutions, Explain, Reassure) Expand on each topic as you feel comfortable and relate back to Community Connections customer service goals 	
<p>Slide 18 (1 min)</p>	 <p>LADDER framework</p> <p>Step 2: Acknowledge</p> <ul style="list-style-type: none"> Restate customer feelings. Do not agree or disagree with customer. 	<p>SAY:</p> <ul style="list-style-type: none"> Read each description under the Step/icon <p>DO:</p> <ul style="list-style-type: none"> Read thru the words in the graphic (Listen, Acknowledge, De-escalate, Deliver solutions, Explain, Reassure) Expand on each topic as you feel comfortable and relate back to Community Connections customer service goals 	<p>DO:</p> <ul style="list-style-type: none">

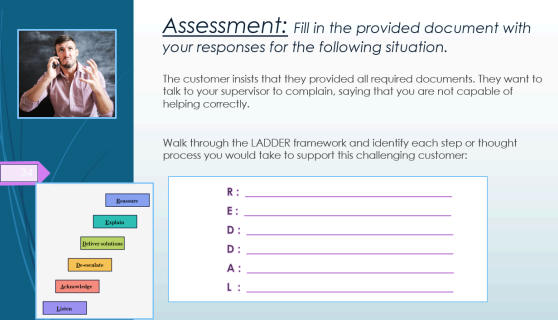
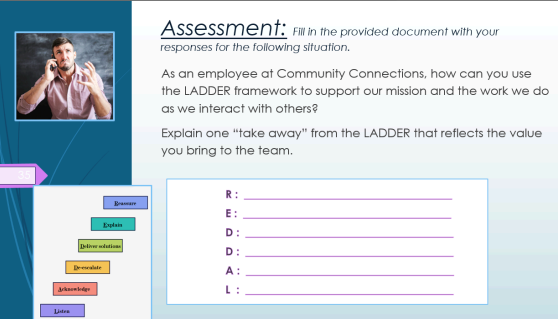
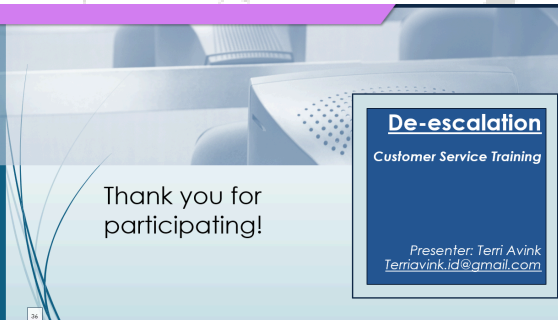
<p>Slide 19 (1 min)</p>	<p>LADDER framework</p> <p>Step 3:</p> <div> <div>De-escalate</div>  </div> <div> <div>Use calm language.</div> <div>Keep tone neutral to maintain empathy.</div> </div> <p>De-escalate</p> 	<p>SAY:</p> <ul style="list-style-type: none"> Read each description under the Step/icon <p>DO:</p> <ul style="list-style-type: none"> Read thru the words in the graphic (Listen, Acknowledge, De-escalate, Deliver solutions, Explain, Reassure) Expand on each topic as you feel comfortable and relate back to Community Connections customer service goals 	<p>DO:</p> <ul style="list-style-type: none">
<p>Slide 20 (1 min)</p>	<p>LADDER framework</p> <p>Step 4:</p> <div> <div>Deliver solutions</div>  </div> <div> <div>Offer steps they can take to resolve.</div> <div>Suggest other options that customers have available. (Use knowledge articles.)</div> </div> <p>Deliver</p> 	<p>SAY:</p> <ul style="list-style-type: none"> Read each description under the Step/icon <p>DO:</p> <ul style="list-style-type: none"> Read thru the words in the graphic (Listen, Acknowledge, De-escalate, Deliver solutions, Explain, Reassure) Expand on each topic as you feel comfortable and relate back to Community Connections customer service goals 	<p>DO:</p> <ul style="list-style-type: none">
<p>Slide 21 (1 min)</p>	<p>LADDER framework</p> <p>Step 5:</p> <div> <div>Explain</div>  </div> <div> <div>Restate what happened.</div> <div>Clarify next steps.</div> </div> <p>Explain</p> 	<p>SAY:</p> <ul style="list-style-type: none"> Read each description under the Step/icon <p>DO:</p> <ul style="list-style-type: none"> Read thru the words in the graphic (Listen, Acknowledge, De-escalate, Deliver solutions, Explain, Reassure) Expand on each topic as you feel comfortable and relate back to Community Connections customer service goals 	<p>DO:</p> <ul style="list-style-type: none">

<p>Slide 22 (1 min)</p>		<p>SAY:</p> <ul style="list-style-type: none"> • Read each description under the Step/icon <p>DO:</p> <ul style="list-style-type: none"> • Read thru the words in the graphic (Listen, Acknowledge, De-escalate, Deliver solutions, Explain, Reassure) • Expand on each topic as you feel comfortable and relate back to Community Connections customer service goals. 	<p>DO:</p> <ul style="list-style-type: none"> •
<p>Slide 23 (1 min)</p>		<p>SAY:</p> <ul style="list-style-type: none"> • “What questions do you have? • Is there anything that you would appreciate clarification on?” <p>DO:</p> <ul style="list-style-type: none"> • Answer any questions. 	<p>DO:</p> <ul style="list-style-type: none"> •
<p>Slide 24 (0.5 min)</p>		<p>DO:</p> <ul style="list-style-type: none"> • Read the text on the slide 	<p>DO:</p> <ul style="list-style-type: none"> •

<p>Slide 25 (1 min)</p>	 <p>Work together:</p> <p>Details</p> <ul style="list-style-type: none"> Time: 3 minutes Equal voices (everyone contribute) LADDER framework Teams: Breakout rooms or In-person. Be prepared to share out. 	<p>SAY:</p> <ul style="list-style-type: none"> Read each step/part of the expectations for working together <p>DO:</p> <ul style="list-style-type: none"> 	<p>DO:</p> <ul style="list-style-type: none"> Open breakout rooms.
<p>Slide 26 (3 min)</p>	 <p><u>Scenario 1</u></p> <p>Joe is a regular customer. He has been transferred multiple times and still doesn't have any answers. He appears very frustrated and is raising his voice.</p> <p>Walk through the LADDER framework and identify each step to support this challenging customer:</p> <p>R : _____</p> <p>E : _____</p> <p>D : _____</p> <p>D : _____</p> <p>A : _____</p> <p>L : _____</p>	<p>SAY:</p> <ul style="list-style-type: none"> Read the scenario and directions aloud to the group. <p>DO:</p> <ul style="list-style-type: none"> Ask if anyone has a question about the task. Remind them that they will have 3 minutes. 	<p>DO:</p> <ul style="list-style-type: none"> Display countdown timer 3 minutes, to start once participants are in rooms.
<p>Slide 27 (2 min)</p>	 <p>Let's share our ideas!</p> <p>Appreciate 2 or 3 volunteers to share.</p> <p>R : _____</p> <p>E : _____</p> <p>D : _____</p> <p>D : _____</p> <p>A : _____</p> <p>L : _____</p>	<p>SAY:</p> <ul style="list-style-type: none"> Let's share ideas. What parts or ideas did you discuss <p>DO:</p> <ul style="list-style-type: none"> Align responses to the LADDER framework Adjust timing based on responses/discussion. 	<p>DO:</p> <ul style="list-style-type: none">

<p>Slide 28 (0.5 min)</p>	<p>Working together = excellence!</p>  <p>Solution Focus!</p>	<p>SAY:</p> <ul style="list-style-type: none"> • “Thank you for digging into the practice together. Let’s continue.” 	
<p>Slide 29 (3 min)</p>	<p><u>Scenario 2</u></p> <p>A new customer calls about a billing error. They are irate and threatening to cancel their account.</p> <p>Walk through the LADDER framework and identify each step to support this challenging customer:</p>  <div data-bbox="564 688 884 813"> <p>R : _____</p> <p>E : _____</p> <p>D : _____</p> <p>D : _____</p> <p>A : _____</p> <p>L : _____</p> </div>	<p>SAY:</p> <ul style="list-style-type: none"> • Read the scenario and directions aloud to the group. <p>DO:</p> <ul style="list-style-type: none"> • Ask if anyone has a question about the task. • Remind them that they will have 1 minute. 	<p>DO:</p> <ul style="list-style-type: none"> •
<p>Slide 30 (2 min)</p>	<p>Let’s share our ideas!</p> <p>Appreciate 2 or 3 volunteers to share.</p> <div data-bbox="432 1032 751 1157"> <p>R : _____</p> <p>E : _____</p> <p>D : _____</p> <p>D : _____</p> <p>A : _____</p> <p>L : _____</p> </div> 	<p>SAY:</p> <ul style="list-style-type: none"> • Let’s share ideas. What parts or ideas did you discuss <p>DO:</p> <ul style="list-style-type: none"> • Align responses to the LADDER framework • Adjust timing based on responses/discussion. 	<p>DO:</p> <ul style="list-style-type: none"> •

<p>Slide 31 (1 min)</p>		<p>SAY:</p> <ul style="list-style-type: none"> Let's wrap up our learning with a quick recap of what we've accomplished. 	<p>DO:</p> <ul style="list-style-type: none">
<p>Slide 32 (1 min)</p>		<p>SAY:</p> <ul style="list-style-type: none"> "What questions do you have? Please raise your hand if there is anything you would like clarified." <p>DO:</p> <ul style="list-style-type: none"> Respond/answer any questions Adjust timing as needed. 	<p>DO:</p> <ul style="list-style-type: none"> Monitor responses for the facilitator
<p>Slide 33 (1 min)</p>		<p>SAY:</p> <ul style="list-style-type: none"> "In order to help us all improve and fulfill the mission of Community Connections, we would appreciate your reflection on what we have learned today." Read the assessment details on the slide <p>DO:</p> <ul style="list-style-type: none"> Remind participants that they can begin shortly and take as much time as needed to complete. 	<p>DO:</p> <ul style="list-style-type: none">

<p>Slide 34 (1 min) Option 1</p>	 <p>Assessment: Fill in the provided document with your responses for the following situation.</p> <p>The customer insists that they provided all required documents. They want to talk to your supervisor to complain, saying that you are not capable of helping correctly.</p> <p>Walk through the LADDER framework and identify each step or thought process you would take to support this challenging customer:</p> <p>R : _____ E : _____ D : _____ D : _____ A : _____ L : _____</p>	<p>SAY:</p> <ul style="list-style-type: none"> Read the directions/scenario aloud. 	<p>DO:</p> <ul style="list-style-type: none"> Share link to document for participants to complete the assessment. Make sure it is shared to the organization as well (for collection).
<p>Slide 35 (1 min) Option 2</p>	 <p>Assessment: Fill in the provided document with your responses for the following situation.</p> <p>As an employee at Community Connections, how can you use the LADDER framework to support our mission and the work we do as we interact with others?</p> <p>Explain one "take away" from the LADDER that reflects the value you bring to the team.</p> <p>R : _____ E : _____ D : _____ D : _____ A : _____ L : _____</p>	<p>SAY:</p> <ul style="list-style-type: none"> Read the directions/scenario aloud. 	<p>DO:</p> <ul style="list-style-type: none"> Share link to document for participants to complete the assessment. Make sure it is shared to the organization as well (for collection).
<p>Slide 36 (1 min)</p>	 <p>Thank you for participating!</p> <p>De-escalation Customer Service Training</p> <p>Presenter: Terri Avink Terriavink.id@gmail.com</p>	<p>SAY:</p> <ul style="list-style-type: none"> Briefly thank them for participating and share your contact information. 	<p>DO:</p> <ul style="list-style-type: none"> When the facilitator is done with this slide, return to previous slide. Close meeting when all participants have submitted assessment.