# The Art of Deescalation

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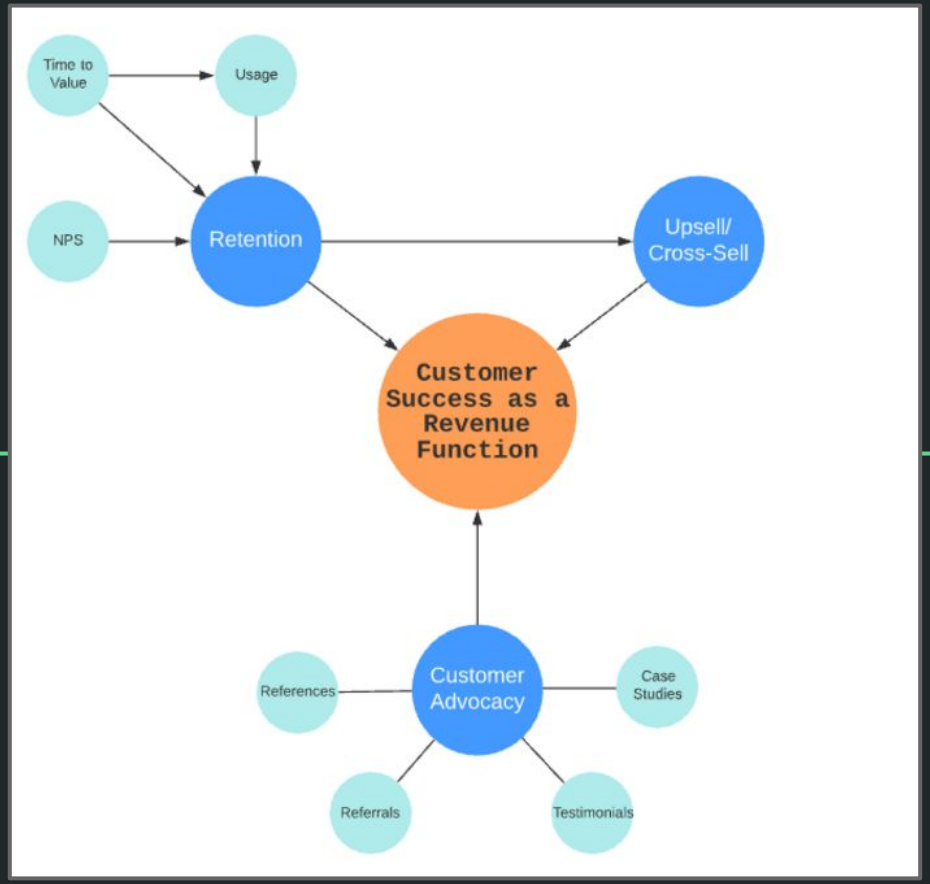
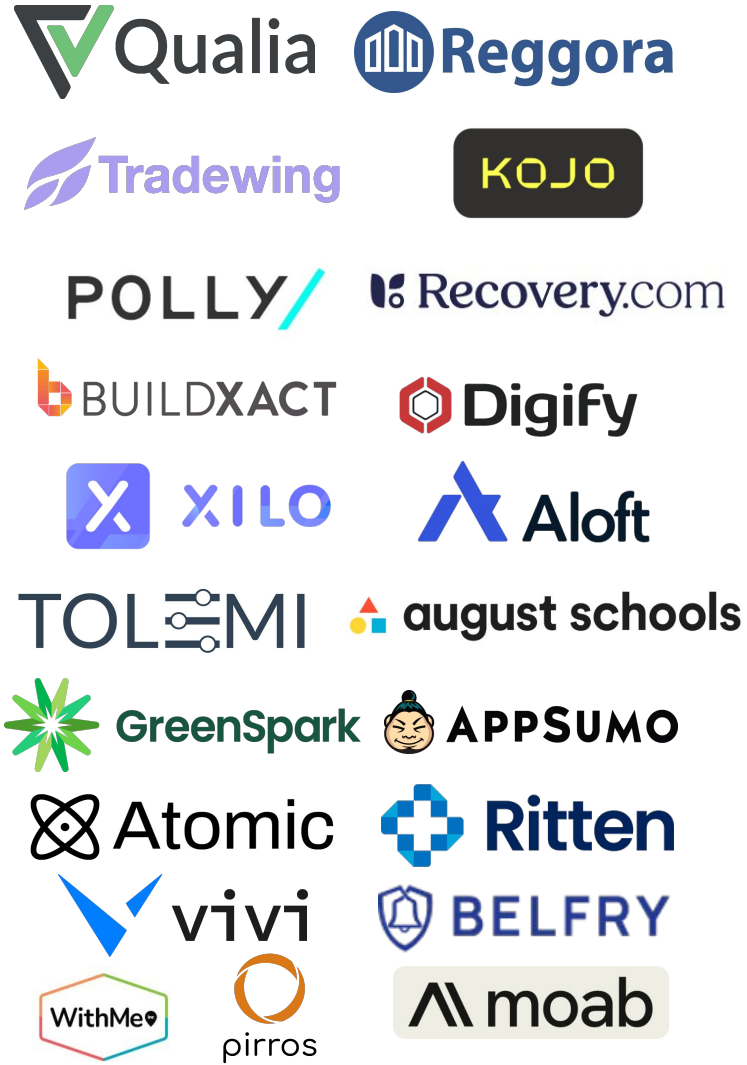
# Why is this important?






# A Bit About Me

*3x Customer Success Leader & Consultant*

- Qualia > Reggora > Tradewing
- Success Scaled Consulting

**Specializations:**

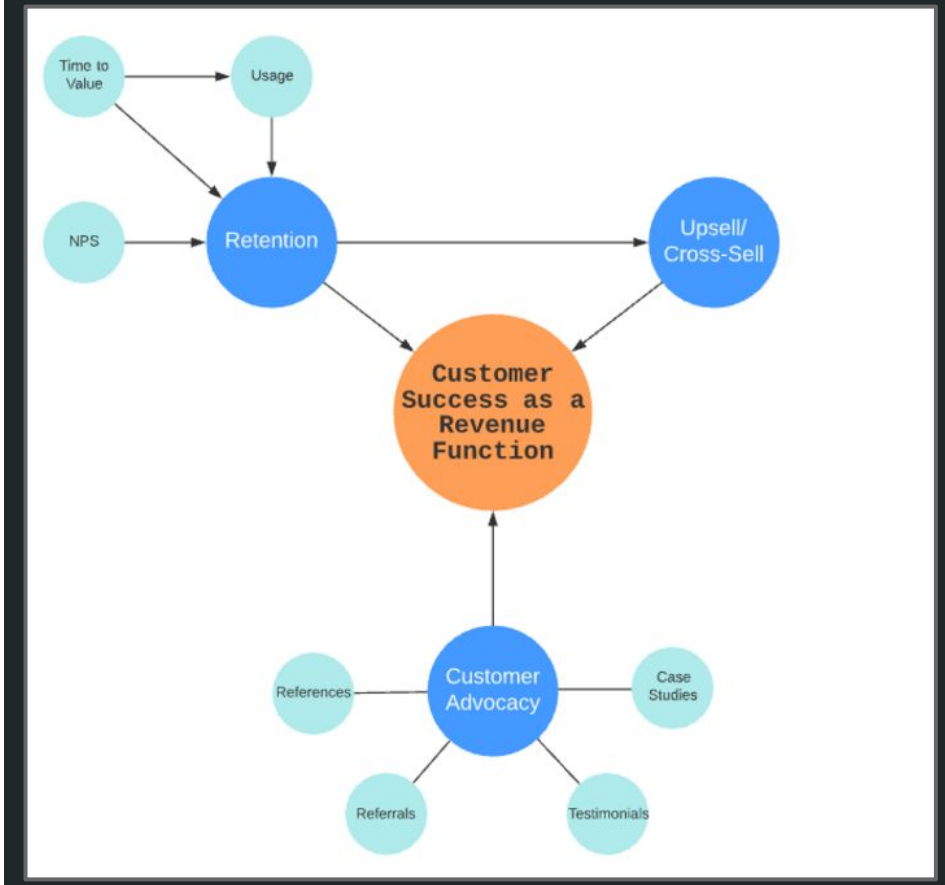
- Building CS from scratch
- CS expansion

**Core Philosophy:** Turning CS teams from reactive cost centers to proactive, revenue-generating functions

# Why are you here?

Our goal today: For you to leave this session with an actionable playbook for:

1. Turning customer anger into actionable product feedback
2. A bit on life in general



Had to deal with an angry customer?

You agree:

“The customer is always right”

Had tense relationships with your product team?

Want to improve your negotiation skills?

#opentowork

# Three Sections

- Handling feature requests
- Deescalating angry customers
- CS-Product relations

**Please be as interactive as possible!**

# Handling Feature Requests

You’re my manager

# Phase 1: Say yes to everything

- **Feedback I got**
  - It’s fair to want to say yes
  - Feedback is good
  - But feature requests are usually bad
- **The Four Costs of Feature Requests**
  - Cost to engineering
  - Cost to you
  - Cost to the customer
  - Opportunity cost
- **“The product is perfect”**

# Phase 2: Negotiation

- **Quick story**
- **A feature request is a negotiation, and negotiation principles apply**
- **Liberating and empowering, but ineffective**
- **Tip: Learn to sit with silence**
- **Non-recommended talk tracks:**
  - **“The product comes as is”**
  - **“We’ve never heard that before”**
  - **“Did you hear we just fundraised?”**

# Phase 3: Template V1

## Template

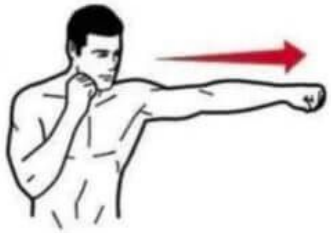
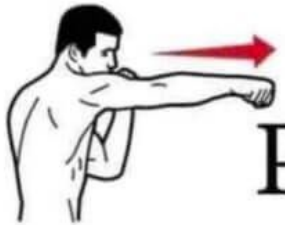
Hi [Customer],

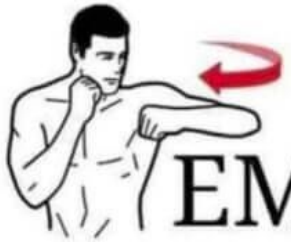
Thanks for reaching out! I'd be happy to help.

At the moment, [Platform] does not support the functionality exactly as you're requesting. That said, I do see where you're coming from and I can send this request to my team for our next round of product reviews. Feature requests like this often take time to review, build, and implement properly, so I don't have an exact timeline as to if or when it would be available, but I can reach out and provide you with an update if the request is accepted and progresses.

It's my job here to see that your needs are met given the current functionality as originally purchased, so if you'd like to share any more details about your goals here, let me know and I'd be happy to help.

Thank you.

AS   PER

MY LAST  EMAIL

# Phase 4:
# “The Submission”

**Email 1:** I understand you here. You’re trying to [do X because Y]. It makes a lot of sense and I’d feel the same in your shoes. It’s feedback like this that has helped us become the fastest-growing player in our space.

I think it would get us back on the same page if I share a perspective from our position. Is that alright with you?

**Email 2:**
I know it may seem that an engineering build for this functionality is quick and simple. But under the hood changes like this are really complex and delicate. Given that we’re transacting well over 10% of the industry on our platform, every new feature impacts tens of thousands of users. With that in mind, we are required to follow a stringent process before release.

Each new feature must pass through several stages including:

- a Customer Success Review to uncover your business need;
- a Product Scope to reveal all possible implications for the thousands of other users;
- an Engineering Scope to plan and allocate the resources required;
- the Engineering Build itself;
- a Senior Engineer Code Review
- a Product Manager Review;
- and Quality Assurance Testing

These steps often take time, but it’s our commitment to good process that has made us the fastest-growing software in our space. Many of our competitors have suffered from skipping some of the steps above, causing them to take one step forward and two steps back.

This may seem ironic, but it’s this process that makes us the fastest at releasing new code in the industry.

I’m your advocate here. I owe it to you to let you know our product roadmap for this year was finalized a couple months back. I think it’s best if we slate this for our roadmap next year, make the most of our time now, and revisit in Q1.

It’s on us to move forward in the meantime. You bought this product to achieve real goals within a specific timeline, and we can’t afford not to achieve these goals in a timely fashion.

I’d like to schedule a call to review alternatives we have in mind in the meantime. We have great alternatives our other users with the same business needs and are committed to solving your need with the tools we have available now, with the product as it was initially purchased. Let me know when you’re free.

I hope this helps share a perspective that’s valuable to you, as well as our commitment to the long-term success of the partnership. You have my commitment to advocate for you so long as I have your commitment to move forward. We’re in this together and have the same goal in mind.

# The Formula: Steal this!

| Step | Tip | Example |
|---|---|---|
| **1** | Challenge yourself to show curiosity and not defensiveness | *Interesting!* |
| **2** | Express gratitude as part of your narrative of growth | *Thank you. That makes sense to me because.... Feedback like this is what helps us grow.* |
| **3** | Prove you understand; reflect back what you hear and even dramatize it! | *If I'm hearing you correctly, you want the ability to [have different logos by branch], right? And you want to do that because…* |
| **4** | Catch all use cases<br>● Makes customers feel heard<br>● Reduces the chance we build incorrectly | *That makes a lot of sense to me. Let's talk about the use cases.* |
| **5** | Inform them of the truth. (They don't know your role)<br>● **I owe it to you** to let you know, our product roadmap is set<br>● Feature requests take time to get right | *I owe it to you to let you know, our product roadmap is set. And feature requests take time to get right* |

| Step | Tip | Example |
|---|---|---|
| **6** | Provide real alternatives<br>● Avoid “workarounds” | *I want to deliver the value from the product you purchased. I have some ideas that work for our other customers. For example...* |
| **7** | Outweigh the feature with the need to move forward<br>● Consider the BATNA<br>● Consider a **concessions playbook** | *I’ll be better at getting this across the line if you help me prioritize/assess whether this is a go/no-go item for you.* |
| **8** | Convey next steps | *I can bring this up during our next quarterly product review.*<br>***You have my commitment to advocate for you so long as I have your commitment to move forward*** |
| **9** | Do not promise a timeline | *I can’t make any promises on if or whether this will be completed* |
| **10** | Let them know we’ll reach out when we have updates, but ask for more info<br>(This should be release notes) | *But I’ll follow up if I get more information. Your case number is #12345.*<br>*(Don’t call me; I’ll call you)* |

When you fight through all the tech support and have to face the final boss

# Exercise

“Look, I really need urgent tasks in the software to turn red. You guys have a priority numbering system, but we don’t like it and you **never** take our feedback.

Our last software had color coding. We can’t go on like this anymore. We’re going to have to cancel ad ask for a refund.”

How would you reply using feel-felt-found?

# The Art of Deescalation

# Introduction

- Escalation is a primary source of burnout
- Deescalation is tricky; it’s extremely taxing; and it’s normal
  - *The likelihood of escalation increases with the importance of your product*
- **Goal:** To provide you a checklist and guide
  - (Although “Everyone has a plan until they get punched in the mouth”)
- **Biggest learning that took me out of the struggle:**
  - Deescalation as a game
  - What does that mean?

# Deescalation as a game

- Winning is successfully retaining the customer
- Losing is the customer walking away feeling dissatisfied and potentially cancelling your product.
- You can’t deescalate if you yourself are escalated
- Think of your calmness as the boundary lines. Losing your cool means you’ve stepped out of bounds, and you need to reset for the next play.
- Letting someone get under your skin is the fastest way to lose.
    - *“If there is no enemy within, the enemy outside can do us no harm.”*
- Take it seriously, but it’s not going to hurt you
- It’s all practice; an art form, and even fun

# Feel-Felt-Found

- A three-step method for deescalation
- Today, we will focus only on “Feel”
- In order for a customer to be willing to calm down, it’s essential for them to know that you understand them and are on their side

# Feel-Felt-Found

- Debating the customer is the most common first mistake
  - **Tip:** Challenge yourself to agree with the customer
  - *Difference between being right and being smart*
- Our goal is to prove to the customer that we're on their side and understand their needs, as risky as that may seem
- The customer has to *believe* you understand where they're coming from.

*"You have two ears and one mouth. Use them in that proportion"*

# Tips on Opening and Reacting

| Tip | Example | Why This Works |
|---|---|---|
| **React to an escalation with surprising – even alarming – excitement** | “I’m so glad we’re getting to hear your feedback today!” | Positivity:<br>- Twists negativity into a story of your success<br>- Catches customer off guard |
| **Beat them to the agenda: Take charge without belittling the customer’s needs** | “The purpose of our call is to get your needs met. I’d like to take 10 minutes to hear your needs and 20 to talk solutions. I will have a hard stop at the half hour” | - Establishes the purpose to their benefit<br>- Sets parameters for the call |
| **Give them the floor** | “I’d like to hear from you” | This keeps you in the driver’s seat |

# Tips Mid-Escalation

| Tip | Example | Why This Works |
|---|---|---|
| **Mirroring** | “Your reports…”<br><br>“I’m pissed off” | Feels risky, but makes the customer feel validated |
| **Expound upon their points** | “You must think I’m such a jerk” | Causes the customer to step back |
| **Labeling** | “You seem like someone who really cares” | Helps the customer reflect on themselves |
| **Lower your voice** | *whispering your points* | The customer mirrors you |
| **Catch them on extreme phrases** | “You never help me”<br>“Never?” | It curtails hyperbole |

# Tips to Gain Control

| Tip | Example | Why This Works |
|---|---|---|
| **Rise above the escalation** | Think of the customer as a drunk friend or an upset kid throwing a tantrum<br><br>Be the adult in the room | It protects you from taking things too personally<br><br>It establishes your agency |
| **Use strategic interruptions when they're spiraling** | "Can I ask a question?"<br><br>"If I may, I'd like to recap my action items here so you can confirm I'm on the right track." | Pauses a tirade |
| **Inform the customer you're only as effective as they make you** | "My team is designed to be an asset to you. We're less effective when we're made to feel belittled" | Aligns incentives |

# Tips to Close

| Tip | Example | Why This Works |
| --- | --- | --- |
| **Express your values** | “We value having a near-perfect product here”<br><br>“We value top-notch service” | It gives hope and optimism |
| **Apologize and thank them** | “If we fell short of your expectations, I want to apologize” | It expresses your values<br><br>It shows grace<br><br>It also surprises them |

# Apologize and Thank Them

- Example:
  - *"Look, I'll be the first to tell you we've fallen short on our support standards lately. Honestly, I want to apologize. We hold ourselves to a sub-60-second pickup time on the phones, and that's a standard we met for all of last year. But we've fallen short in January. The problem was that 2% of the US real estate market decided to onboard with our product on January 1. This was a blessing, but a little bit of a curse. We honestly couldn't staff up fast enough, and you know how hard it is to find and train good people in this industry.*
  - *The good news is I do have a  solution. I've spent the last two months hiring and training some brilliant people. In the next two weeks, we're doubling the size of our support team. I'll bet that in a month's time you'll have a vastly different experience.*
  - *Put me to the test and let me prove it!"*

# Quick Tips

- Recognize that, sometimes, your biggest critic is also your biggest advocate

# Anti-Tips

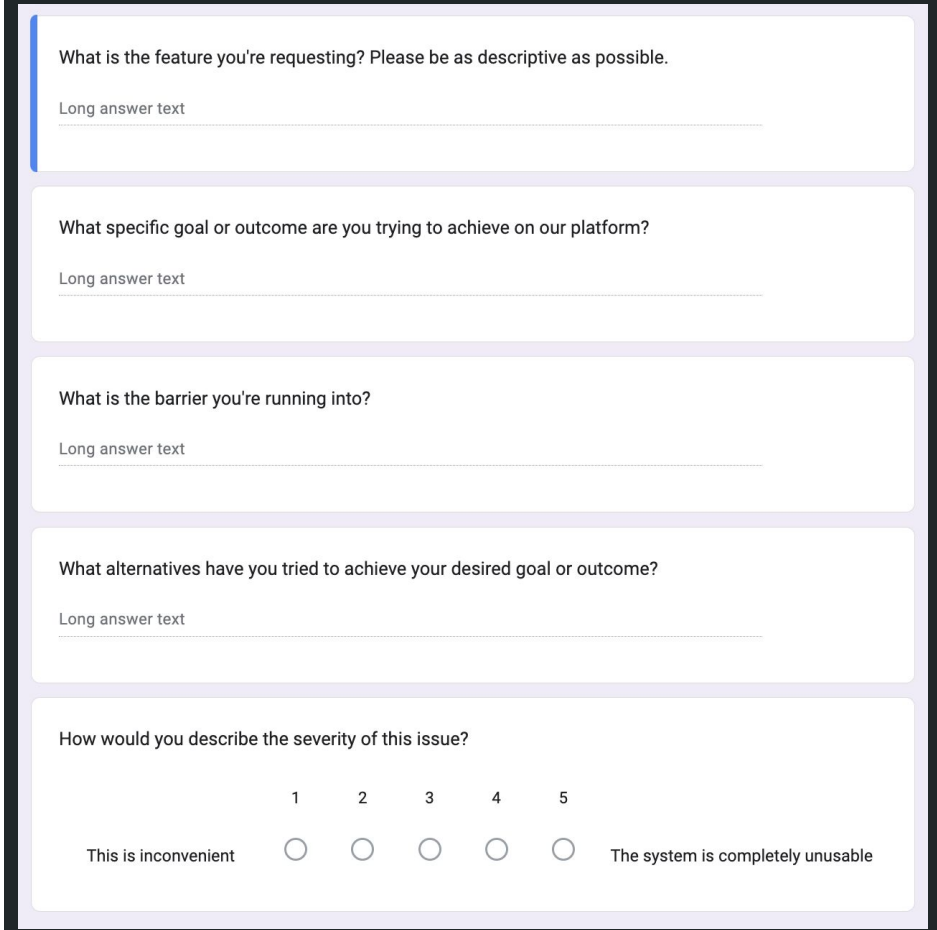
- Consider an injection of humor
  - $400/hour story
  - “You don’t understand; I have angry customers”
- One last anti-tip

# Conclusion:
# CS-Product Relations

# Pain-Centric Template for a Feature Request

**A few tips:**

- Focus on the pain, not the solution
- Don’t submit anything you’re not proud of
- Ask the customer to do this



# Template for CS-Product Meetings

**Purpose (the "why"):**

- Increase collaboration between CS and Product with the goal of reducing churn 🤝
- Increase visibility to product and leadership around the voice of the customer 👀
- Improve employee satisfaction by removing mutual roadblocks 😄

**Agenda (the "how"):**

- **Departmental Updates**
  - This includes major departmental updates like someone new starting, role changes, etc.
  - This also includes KPIs
- **Last Release** (Product)
- **Next Release & Roadmap** (Product)
- **High-Urgency Tickets & Churn Risk Accounts** (CS)
- **Feedback Trends** (CS)
- **Nice-to-Have Ideas or Feedback** (CS)
- **High-Level Initiatives** (CS & Product)
  - Example: building out a customer advisory board
- **Next Steps Established**