



DEALING WITH DIFFICULT CUSTOMERS POLICY

Purpose:

This policy was developed to provide consistency in dealing with customers, specify next steps when an interaction with a customer becomes “difficult”, enhance staff confidence in dealing with difficult interactions, and provide support to staff in dealing with these situations.

As a general rule, interactions with customers are positive and enjoyable. When a customer approaches the Municipality with a request, application, concern or complaint they are heard, understood and respected.

This policy pertains to interactions with customers in person as well as communication through email, phone and social media.

Objective:

This document outlines how municipal staff will deal with a customer interaction that becomes “difficult”, defined as:

- Physically and/or verbally aggressive;
- Rude, abusive, demeaning and/or harassing;
- Cannot be satisfied despite the best efforts of staff;
- Constantly raise the same issue with different staff; and/or
- Makes unreasonable demands on the Municipality where resources are substantially and unreasonably diverted away from its other functions or unfairly allocated (compared to other customers).

Procedure:

General Interactions

When contacted, municipal staff will make every effort to understand the customer’s issue and are empowered to resolve the issue to the best of their ability.

If the issue is related to policy, regulatory or legislative requirements that information should be provided to the customer. Commonly referred policies, regulations and legislation should be available on the Municipality’s website for ease of referral.

If required, Staff is empowered to investigate the issue fully including consulting

with colleagues and other departments. The outcome of this investigation should be provided to the customer in a timely fashion.

Difficult Interactions

If a customer's interactions, in the opinion of staff, meets the definition of "difficult" as described herein staff will remain calm & respectful, hear out the concerns, and try to accommodate where possible. To assist staff during these interactions, they may reference Schedule A of the policy.

If staff has attempted to the best of their ability to accommodate the customer's issue and they remain "difficult" the customer may be referred to the Department Head. When referring a difficult interaction the staff member will immediately provide all appropriate documentation, including a summary of interactions to date, to the Department Head.

The Department Head may see fit to further investigate the issue and is empowered to do so. The Department Head may contact the customer restating Municipality's position on the issue if necessary.

Customers Who Are Aggressive, Rude, Abusive, Demeaning and/or Harassing

The Municipality will not tolerate or condone intimidating or offensive behaviour toward staff by members of the public under any circumstances. Any staff member who is the victim of such behaviour may, at their own discretion, report the matter to Police for further action.

Rude, abusive or aggressive behaviour may include rude or otherwise vulgar noises, expressions or gestures, verbal abuse of a personal or general nature, threatening or offensive behaviour, physical violence against property or physical violence against a person.

If in the opinion of any staff member rude, abusive or aggressive comments or statements are made in telephone conversations or in person, the staff member may:

- Respectfully warn the caller that if the behaviour continues the conversation will be terminated;
- Respectfully terminate the conversation if the rude, abusive or aggressive behaviour continues after a warning has been given.

Where a conversation is terminated, the staff member must notify their Department Head of the details immediately.

If, in the opinion of the Department Head, any correspondence to the Municipality is received and found to be containing personal abuse, inflammatory statements or materials clearly intended to intimidate, a copy will be kept on file with the Municipality

in accordance with the Municipal Records Management Policy. Violence, damage to property or threatening behaviour may be reported to police, depending on the severity of the actions.

Follow-Up on Difficult Interactions

When a difficult interaction occurs and is referred to the Department Head it is expected that the Department Head will investigate the interaction and contact the customer as required. Support from the Chief Administrative Officer (CAO) may be requested at any time. Depending on the specific details of the interaction, the following courses of action are available:

- Where customers are considered aggressive, rude, abusive, demeaning and/or harassing, to not accept any further phone calls or face to face interactions from the customer staff may:
 - require all further communication to be put in writing; and
 - continue to receive, read and file correspondence but only acknowledge or otherwise respond to it if significant new information relating to their complaint or concern; or the customer raises new issues that warrant new attention.
- Where customers are considered unreasonable in terms of time and resources necessary, to advise the customer to limit the focus of their requests and that if the customer continues to place unreasonable demands, staff may:
 - not respond to any future correspondence and only take action where the correspondence raises specific, substantial and serious issues; or
 - only respond to a certain number of reasonable requests in a given period.
- Where customers raise the same issues many times with different staff or elected members to advise the customer that:
 - only a nominated staff member will deal with them in the future;
 - they must make an appointment with that person if they wish to discuss a matter. The staff member may choose to have a witness attend the meeting as well; or
 - all future contact with Municipality must be in writing.

In any of these instances customers may wish to make a formal complaint in writing to the CAO.

Any follow-up must be documented and appropriately filled with a report back to the referring staff member(s) of any action or decisions taken. Further reporting to other Department Heads may also be appropriate and is at the discretion of the Department Head.

Staff Support:

Remember, while the Municipality is here to serve the community, staff is not here to be abused. Staff may wish to consider the following if they are facing or have experienced a difficult customer interaction:

- Trust your instincts. If you feel uneasy about a situation ask for assistance or take necessary precautions.
- When meeting with someone you are not familiar with, or when discussing a difficult subject matter, consider meeting in a visible location, tell someone in advance or invite a colleague to join you.
- When discussing a difficult subject think about your interaction in advance and script what you would like to say to the greatest degree possible.
- Print Schedule A: *Dealing with Difficult Customer Interactions* to have at your desk.
- If a customer becomes disruptive or “difficult” in the presence of other customers, refer them to the Department Head so as to avoid a public scene.
- If a customer interaction becomes rude, abusive or aggressive you may end the interaction and report it.
- Difficult interactions can be challenging and emotional. Self-care is important. If you have been involved with a difficult interaction feel free to speak with a colleague or manager.
- Counselling is available to all staff through the Employee and Family Assistance Program (EFAP).

Documentation & Reporting:

In all of the situations referred to in this procedure, adequate records must be kept and maintained on the appropriate file. A record of a difficult customer interaction should include, but may not be limited to, the following information:

- The date and time of the incident;
- The customer name;
- The name of the primary employee involved in the interaction, as well as a list of any other staff who witnessed the event and/or a list of staff members to whom the incident was escalated to;
- A brief summary of the incident, outlining the topic of discussion, a description of the offending behaviour(s), and any actions that the employee attempted to take to resolve the issue; and,
- A brief summary of any actions that the employee took after the interaction, if applicable.

For the purposes of keeping adequate records, any staff member that experiences a difficult customer interaction should fill out and submit Schedule B: *Difficult Customer Interaction Report* to their Department Head.

If an elected member feels that a customer is being difficult in a manner specified in this policy, they may notify the CAO who will consider taking action as per avenues described above.

Where the Department Head or CAO determines to limit a customer's access in any of the ways specified in this policy, the CAO will advise Council as soon as possible of the relevant circumstances and the action taken and notify, where appropriate, the Department of Municipal Affairs and the Nova Scotia Ombudsman for information



M Jordan

August 12, 2019

Municipal Clerk

Date

Schedule A: Dealing with Difficult Customer Interactions

Nothing lowers the level of conversation more than raising the voice. --Stanley Horowitz

Remember: "No one can get your goat if they don't know where it's tied up." -Zig Ziglar:"

Trust yourself; you have the experience and ability to handle this, and the back up in your team to support when you need it.

Sample phrases you can use when dealing with difficult customers/ clients:

- I understand how frustrating this can be...
- Thank you for bringing this to our attention...
- I am sorry this has/ is happening to you...
- Here is what I can do...
- Let's see how we can help....
- Thank you for listening to me, here is what I can do...
- I understand this is difficult....
- I understand and am as frustrated as you, let's look together at our options...
- Let's see if there is a mistake or a misunderstanding...
- What do you think is the best solution....
- If you have an idea of how we can fix this, let's look at it and determine next steps, the next step might be to include our manager...
- How would you like this handled?
- I agree this is a difficult situation let's look at how/ why it happened.
- I appreciate your perspective, I am unable to change this, I can share the situation/ information/ your perspective with my manager and have him or her contact you.

If things start to go downhill fast:

- I appreciate your situation but it is not okay for you to speak to me this way.
- Thank you for bringing this to our/ my attention for us to help you further I / we will need you to document/ submit your concerns in writing, here is the form/ how can I get you the form etc.. (Provide/ request contact information).
- I appreciate your frustration but you cannot abuse/ disrespect me/ my colleagues/ coworkers.
- Stop. I do not feel that we are getting anywhere, let's take a minute to breathe and think of solutions, can you please take a seat and give me a minute.
- In person: Would you like to take a seat, can I get you some water; give me a minute to see what our options are.
- On phone: I understand you are upset, I am going to go and try to find out what are options are and someone will call you back tomorrow. Thank you, take care. (Hang up)

Schedule B: DIFFICULT CUSTOMER INTERACTION REPORT

Employee's Name: _____

Date and time of Interaction: _____

List of any other staff involved or witness to the interaction: _____

A brief summary of the incident, outlining the topic of discussion, a description of the offending behaviour(s), and any actions that the employee attempted to take to resolve the issue:

A brief summary of any actions that the employee took after the interaction, if applicable:

Signature: _____