

The guide to managing customer crisis situations



Welcome!

This guide was created to provide you with a step by step process for handling customer crisis situations, customer incidents and/or any other difficult interactions that you as a business need to own and resolve with your customers.

Without the proper tools, these types of interactions can be incredibly stressful and uncomfortable but by having a laid out, systematic approach to dealing with such situations, you are taking out the emotional aspects and focusing solely on the factual circumstances of the situation. This in turn will direct your customers to also keep the emotional side out of the conversation, making your interactions more productive, meaningful and open to resolution.

Once you have been made aware of the issue, follow the 5 steps that will be covered in this guide.

If you haven't yet done so, please read through the blog on Managing Customer incidents to get the full context of the below step-by step process.

You got this!

Hadas

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5 steps to handling customer incidents

01

Acknowledge the issue & empathize with your customer

02

Gather all of the facts from your customer & any relevant 3rd parties

03

Investigate the root of the problem & try to reproduce it (troubleshoot)

04

Work to resolve the issue or work with relevant 3rd parties to resolve the issue

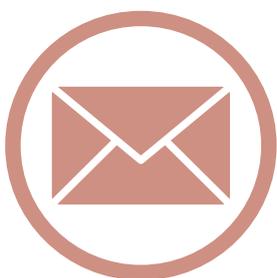
05

Summarize and communicate with your customer by answering the 4 questions on the next page....

Summarizing the Incident

Once you have all of the details, and completed steps 1-4, summarize and communicate with your customer by answering the following 4 questions:

1. **What happened?** Recap the events leading up to the problematic situation. If possible, include timelines and additional details as necessary.
2. **Why it happened?** Don't shy away from saying it was a human mistake. I promise you that your customers have made mistakes too, and they will appreciate you taking ownership and admitting that you were wrong.
3. **What are you doing to resolve the issue?** Again, including as many details as possible. Timing is key here! Mistakes happen, and that's okay, but the true measure of your business will be how fast you react and correct the situation.
4. **How are you going to prevent the issue from happening again in the future?** Customers prefer to hear process-driven methods (i.e. "I will be adding a QA step to my process, which will ensure any spelling mistakes are checked before publication") rather than personal commitments (i.e. "I'll check my work twice before publishing").



Emails are preferable to phone calls so you have everything documented but if you decide to call the customer, make sure to follow-up with an email as well.

Lastly...

In addition to the steps outlined above, remember to continuously update your customer on your progress so they know the issue is under control. The customer needs to know that you are handling this issue at top priority and as an urgent matter.

While some crisis situations are caused by the customer's actions and/or third parties, refrain from laying blame. Instead, follow the 5 steps above and summarize the incident explaining clearly the cause of the issue and how they can resolve it on their end.

It's important to remember that it's not the mistake that defines your business, but rather the speed in which you correct the situation and respond to your customers

To learn more about managing your work with your customers, setting expectations, how to profit from customer complaints, restoring customer confidence and so much more! visit www.thecustomercompass.com or email me directly at hello@thecustomercompass.com.

Looking forward to hearing from you soon!

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