Navigating Difficult Situations

**PROCESS**

1. **Acknowledge the anger.** You don’t have to agree with it, but in order to have chance at making it go away, you need to empathize with the person’s anger.

2. **Talk more quietly and more slowly** than the person you’re talking with. Not an exaggerated mantra, but just enough that you will be de-escalating, not escalating.

3. **Listen.** The most important step in the whole of this process is listening actively to what your client or customer is saying - he wants to be heard, and to air his grievances.
   - Start the dialogue with a neutral statement, such as, "Let's go over what happened," or "Please tell me why you're upset."
   - Resist the temptation to try to solve the situation right away, or to jump to conclusions about what happened. Instead, let your client tell you his story. As he's talking, don't plan out what you're going to say when he's done – this isn't active listening! Also, don't allow anything to interrupt this conversation. Give your client all of your attention.

4. **Repeat Their Concerns.** Once he's had time to explain why he's upset, repeat his concerns so you're sure that you're addressing the right issue. If you need to, ask questions to make sure that you've identified the problem correctly.
   - Use calm, objective wording. For example, "As I understand it, you are, quite rightly, upset because we didn't deliver the samples that we promised you last week."
   - Repeating the problem shows the customer you were listening, which can help lower his anger and stress levels. More than this, it helps you agree on the problem that needs to be solved.

5. **Be Empathic and Apologize.** Even if you disagree and/or the person is being mean. It will only help you to maintain composure, put yourself in their shoes, and say you’re sorry. Even if it is not your fault – apologize. For example, you could say, “I understand why you’re upset. I would be too. I’m very sorry that we didn’t get back to you on time, especially since it’s caused these problems.”

6. **Present a Solution or Path to a Solution.** Say what you can do that will make things better. If that isn’t enough, ask what they want to solve the problem. If you can’t accommodate – close the conversation by advising them that you will get assistance and follow up ASAP. You now need to escalate to your manager (see Escalating Up below).

7. **Take Action and Follow-up.** Once you've both agreed on a solution, you need to take action immediately. Explain every step that you’re going to take to fix the problem to your customer. If she has contacted you by phone, make sure that she has your name and contact details. This gives her a feeling of control because she can get hold of you again if she needs to. Once the situation has been resolved, follow up over the next few days to make sure that the customer is satisfied.

8. **Use the Feedback.** Your last step is to reduce the risk of the situation happening again. If you haven't already done so, identify how the problem started in the first place. Find the root of the problem and make sure it's fixed immediately. Also, ensure that you're managing complaints and feedback effectively, so that you can improve that way that you do things.
ESCALATING UP

Knowing When the Time is Right

Ask yourself these questions to help you decide whether it is time to escalate:

• Have you made a sincere attempt to reach an appropriate resolution but have found that you are at a dead end?
• Is this an issue that your boss would expect you to handle or to escalate?
• Do you have all the appropriate know-how to make the decision, or does another expert need to be consulted?
• Can you approach these experts or stakeholders directly, or is escalation the only way to obtain their input?

Doing it right

Once you’ve decided to escalate, it’s important to do it in a professional way. Here are six tips for effectively escalating problems with your project or on your project team.

1. You need to determine the right person to escalate to. The immediate manager may not be the one to escalate to.

2. Escalate to an appropriate level in the hierarchy in which there is someone empowered to make the decision or intervene. Going “too high” may result in your request being sent down to a lower-level employee.

3. Provide a concise summary of the problem and also indicate where detailed information can be found. Do not assume that the people you are escalating to have the required background information.

4. State explicitly what you need. Don’t leave any ambiguity. Make sure you say when you need it and the impact or consequences if the expected action is not taken in time.

5. Follow up, even after sending that email and/or making the telephone call – do not assume that when you escalate, the ball is now in the other person’s court.

6. Use appropriate, respectful content. Harsh e-mails and/or telephone calls complicate more things than they solve.

A Positive No in short is a Yes No Yes. The first Yes expresses your needs and values, the No asserts your power, and the second Yes furthers your relationship. The key is respect – for yourself and for the other person. The Power of a Positive No: Save The Deal Save The Relationship and Still Say No.

William Ury

Sources: “How to Deal with an Angry Customer” blog by Seth Godin, Mindtools (http://www.mindtools.com/pages/article/unhappy-customers.htm), and from PMI Institute webpage summary from “Escalation—Let’s Do it Right!” by Hrishikesh Karekar, PMP, an article posted on the Knowledge Shelf.