



Customer Service and Crisis Management Participant Guide



Duration: 2 hours

TMS:

VA 4633896 Public Service Guide

VA 4633902 Crisis Management

Audience:

This lesson is intended for: Service Recovery Practitioners

Purpose

This lesson provides VA employees an opportunity to enhance their knowledge in customer service and crisis management in preparation for making service recovery calls.

Objectives

Upon completing this lesson, trainees will be able to:

- Define and apply the VA Core Characteristics to interactions,
- Recognize and incorporate strategies for customer service,
- Use active listening skills,
- Develop critical thinking skills,
- Assert empathy,
- Apply the best practices for conversation control and handling conversations,
- Implement assertive communication techniques,
- Identify and implement the problem-solving process,
- Apply techniques to effectively close a conversation and
- Identify customer service traits.

VA's Core Characteristics

The Core Characteristics further define "what we stand for" and what VA strives to be as an organization. The six core characteristics are:

1. Trustworthy

VA earns the trust of those it serves, every day, through the actions of all employees. That includes you and me!

2. Accessible

VA engages and welcomes Veterans and other beneficiaries, facilitating their use of the entire array of benefits and services.

3. Quality

VA provides the highest standard of care and services to Veterans and beneficiaries while managing the cost of its programs and being efficient stewards of all resources entrusted to it by the American people.

4. Agile

VA anticipates and adapts quickly to current challenges and new requirements by continuously assessing the environment in which it operates and devising solutions to better serve Veterans, other beneficiaries, and Service members.

5. Innovative

VA promotes curiosity and initiative, encourages creative contributions from all employees and seeks continuous improvement. VA adapts to remain at the forefront in knowledge, proficiency, and capability to deliver the highest standard of care and services.

6. Integrated

VA links care and services across the Department, with other federal, state, local agencies, with other partners, and with Veterans Services Organizations (VSOs) to provide useful and understandable programs to Veterans and other beneficiaries. VA also has a relationship with the Department of Defense to work in unison to provide benefits and services to Service members with a known separation from service date.

VA Customer Service

VA customer service relationship with Veterans differs from the standard customer relationships built in other businesses. In a standard business customer service relationship, customers pay for a product or service. In the VA customer service relationship with Veterans, they have already earned their benefits and services because of their service to our country. Therefore, how we interact with Veterans and beneficiaries is different than a standard business would interact with their customers. We are not selling a product; we are attempting to gain our customer's trust and satisfaction.

Customer Service Strategies

Customer service strategies involve detailing how you will interact with the Veteran. This interaction can set the tone of the interaction and impact the Veteran's attitude from their first contact through the life of the relationship the Veteran has with VA.

6 Stages of a Conversation

Stage 1: Prepare for the Conversation

Stage 2: Initiate the Conversation

Stage 3: Deliver the Message

Stage 4: Listen and Respond

Stage 5: Explore Alternatives and Solutions

Stage 6: Close the Conversation

Stage 1: Prepare for the Conversation

Questions to Prepare for a Conversation

Preparing for a difficult conversation requires careful thinking about questions such as these:

- What is the situation? Do you have enough information to understand it fully?
- What are the facts? What assumptions are you making?
- What are the stakes for you and the other person?
- What is the other person's point of view?

Stage 2: Initiate the Conversation

Develop a Call Flow

Think about a time when you were the customer and you spoke with someone in customer service. Were you greeted with a friendly and confident voice, or did it sound like the representative was clueless about how to assist you?

Developing a call flow is a best practice amongst customer service representatives. The benefits of a call flow are:

- Professionalism,
- Organization,
- Ensure all tasks are completed,
- Same level of assistance on each interaction,
- Build rapport and
- Build trust.

Suggested Call Flow

Greet the Veteran

The key to the greeting is to provide a professional, strong opening that allows you to immediately take control of the interaction to ensure the Veteran's experience is

respectful, efficient, and outcome oriented. It's crucial the responder guides the Veteran through the initial stages of the interaction efficiently allowing for the most time possible to answer inquiries or resolve issues presented. The desired outcome of the greeting is the Veteran knows the name of the responder they are speaking with, which helps them feel like someone is accountable.

- Establish rapport in a friendly and confident voice,
- Provide complete and accurate information and
- Identify VA and self.

Acknowledge the Veteran's Service

It is important for the Veteran's service to be acknowledged during every call whenever speaking with a Veteran, an active-duty service member, or a family member of a Veteran. It is preferable the Veteran's service be acknowledged during the greeting; however, responders can also opt to show appreciation for the Veteran's service when closing the call.

Examples of how to acknowledge a Veteran's service after the greeting:

- Thank you for that information and thank you for your service/the Veteran's service.
- Thank you for that information and we appreciate your service/the Veteran's service.
- Thank you for that information and on behalf of the VA, I would like to thank you for your service/the Veteran's service.

Stage 3: Deliver the Message

Assist the Veteran

During this phase of the call, it is important that each issue the Veteran implies is identified, documented, and addressed accurately. Responders should actively probe for details regarding the issue(s) being addressed while continuing to control the conversation respectfully. Responders should ask clarifying questions when the Veteran's questions or statements are not easily identifiable.

The desired outcomes for assisting the Veteran are to reassure the Veteran the responder is listening and understands the situation both emotionally and factually, as

well as the responder is doing as much as possible to assist with all their VBA issues and are not just rushing them along. The interaction should also ensure the call is documented correctly for accurate and effective issue tracking. This assists with reducing call backs by providing all the information the Veteran needs to resolve the issue.

Examples of ways to reassure the Veteran during the call:

- Acknowledge both emotional impact (if any) of the situation, as well as the factual situation.
- Clarify Veteran's goal of the initial call with emphasis on the outcome and possible resolution of the issue.
- Be appropriately empathetic in tone and speech.
- Interpret the facts to determine appropriate actions.
- Identify the purpose of the contact and offer to help.
- Clearly identify each issue presented.
- Provide complete and accurate information for all the Veteran's issues.
- Take all necessary and required actions to resolve the issue.
- Accurately ensure understanding of options to support sound decision making.
- Listen for unasked questions that may come across as a statement.
- Provide a resolution for the Veteran's issue.

Stage 4: Listen and Respond

Active Listening

Active listening is the practice of paying full attention to and absorbing what someone is saying so that mutual understanding can occur or be improved. Active listening is an important first step to defuse a situation and seek solutions to problems. Active listening involved listening to their words, the tone of their voice, and unspoken emotional queues that give insight into how they feel.

Benefits of Active Listening

- Builds relationships.
- Meets core needs.
- Increases productivity.

- Problem solving.
- Avoiding unnecessary conflict.

Active Listening Techniques

- Focus on the purpose of the conversation.
- Give encouraging verbal cues.
- Clarify and paraphrase information.
- Ask questions.
- Refrain from judgement.
- Summarize, share, and reflect.

Knowing How to Apologize to the Veteran

When something goes wrong, apologize. It's easy, and the Veterans will appreciate the initiative. Even though the Veteran may not always be right, it is important to remain professional and sincere. Apologizing does not mean you are wrong; it simply reflects the regretful acknowledgement of an offense or failure. This is not necessarily your personal failure, but the failure of something beyond your control. By apologizing it lets the Veteran know you hear them, and you acknowledge that an error has occurred.

Stage 5: Explore Alternatives and Solutions

Problem-Solving Process

- **Define the Problem:** What, specifically, is the issue? What isn't part of the problem?
- **Gather Information:** What are the facts? What interpretations and judgments are you making about the facts? What interpretations and judgments are others making? How do you feel about the situation? How do others feel?
- **Brainstorm options:** Attempt to solve a problem or come up with new ideas by having a discussion that includes all members of a group. Discuss a problem or issue and suggest solutions and ideas.
- **Evaluate potential solutions:** What is the ideal outcome? What are the benefits and risks associated with each option? Which option would create the greatest

level of satisfaction among those affected? Which option would create the lowest level of satisfaction?

- **Choose and implement the best option:** Once you have gathered all your information you will want to choose the best scenario and implement the action(s).

Assertive Communication Skills

Assertiveness is the ability to communicate your feelings and needs clearly to another person while remaining respectful of that person’s feelings and needs. It is the middle ground between passive communication and aggressive communication.

Passive communicators are likely to avoid expressing themselves and quietly accept other people’s positions. The driving force behind passive communication could be fear, desire to avoid conflict, or a lack of confidence to speak up.

Aggressive communicators are likely to blame others, attack other’s opinions, or are pushy with their views. These communicators use a lot of “you” language, cut people off mid-sentence, use a frustrated or angry tone, and use tactics to dominate other people. The driving force behind aggressive communication could be the desire to be in control of every situation, to win, or to always be right.

Below is a chart of the differences between passive, assertive, and aggressive communication.

Passive	Assertive	Aggressive
Too scared to say what you think	Expresses self clearly and confidently	Expresses self with aggression and irritation/anger
Speaks softly or weakly	Speaks firmly	Speaks loudly (shouting)
Reduces own self-esteem	Increases own self-esteem	Reduces others’ self esteem
Others’ needs are put first	Self and others’ needs are taken into account	Own needs are put first
Can’t say “no” to others’ requests or demands	Is able to say no in a calm and direct way	Says no in an aggressive and reactive way
Aims to please others	Aims to express needs	Aims to win

Why is assertive communication the best approach?

It is the best approach because in contrast, if you are passive or aggressive, people will be distracted with how you express yourself and they won't be able to hear what is beneath it. You are giving them two jobs; you are asking them to hear you, but you are making it difficult to do that because you are giving them an unhelpful communication style to react to.

Assertive communication is clear and respectful but without the emotional noise and that means your message is more likely to hit its mark. Assertive communicators are more likely to be heard.

Assertive Communication Process

- State the issue or problem.
- Show empathy.
- State what you need specifically.

Assertive Communication Techniques

Use "I" statements. This keeps the focus on your own feelings and needs, rather than blaming or accusing the other person.

"You" Statement: *"You are causing the delay."*

"I" Statement: *"I am concerned about the delay."*

The communication skills component ensures the responder maintains high personal standards throughout the call and provides an overall exceptional experience for the Veteran. responders should maintain a positive attitude and provide the utmost courtesy and respect to the Veteran, regardless of the situation or the behavior of the Veteran.

The desired outcome of the communication throughout the call should exhibit a welcoming and engaging tone with the Veteran, using words such as "please" and "thank you" throughout the call. Responders must show respect by listening carefully and demonstrating they are ready to spend the time necessary with the Veteran. Responders should limit the use of acronyms, abbreviations, or language unknown to the typical Veteran.

Examples of courteous and professional language/actions:

- Ask permission to place Veteran on hold.

- Apologize for a lengthy hold.
- Address the Veteran by their last name or “sir/ma’am.”
- Avoid using a curt or rude tone.
- Refrain from using slang, casual or profane language.
- Refrain from making unprofessional comments regarding the VA, the President, government employees, other government agencies, etc.
- Keep attention focused on the Veteran.
- Avoid interrupting or talking over the Veteran.
- Offer condolences when appropriate.
- Avoid eating and chewing gum.
- Refrain from personal conversations during the phone call.
- Refrain from inappropriately disconnecting the call.

Difficult Conversations

Difficult conversations are inevitable in any workplace. These types of conversations can create unhappiness, stress, and tension. It is impossible to avoid these kinds of conversations, but you can learn how to handle them more effectively.

Conversations You May Find Difficult

- Delivering bad news, such as denied requests.
- Giving people negative feedback.
- Saying “no” when people ask you to do something you are unable or unwilling to do.
- Asking people to do something unpleasant, difficult, or outside the scope of their responsibility.
- Acknowledging mistakes.
- Someone experiencing a mental health emergency or experiencing a hardship.

Tips to Handle Difficult Conversations

- Prepare yourself.
- Make sure you know what you want to achieve.
- Deliver the message promptly and clearly.
- Focus on the facts and tell the truth.
- Ask questions and try to see the situation from the other person's point of view.

- Listen actively, empathize, and acknowledge, respect, and validate the other person's feelings.
- Don't take people's reactions personally.
- Stay calm and manage your own feelings.

Best Practices for Delivering Difficult Messages

- Be clear and specific and focus on the facts.
- Give examples when possible.
- Be sincere, tell the truth, and provide accurate information.
- If you need more information about the situation, ask questions.
- Allow the other person the chance to ask questions; answer them honestly and briefly, and if you are not able to disclose the information, explain why.
- Avoid distractions: do not take phone calls, check email, or send text messages.
- Take responsibility when warranted: don't blame others or try to justify your actions.
- Reframe the situation in a positive light, if appropriate, but don't lie.

Tips for Coping with Responses

Many difficult conversations include a discussion of alternatives and solutions for resolving an issue or problem. Let's look at how you can make those discussions as productive as possible.

General Strategies

- Stay calm, take a deep breath, and manage your own emotions.
- Acknowledge and respect the person's feelings.
- Let the person express his or her feelings, opinions, and ideas.
- Show empathy.

Specific Strategies

- If the person is angry: Allow them to "vent," and let him or her know that it's okay to be angry.
- If the person is in tears: Wait quietly while they get themselves under control and acknowledge their feelings: "I can see that you're upset...."
- If the person is frustrated: Acknowledge and empathize with their feelings: "*This must be very frustrating for you....*"

- If the person shows resistance: Empathize, focus on facts, and offer evidence. *“I understand that you don’t consider this a problem. Let me explain why it is...”*
- If the person is passive: Ask questions: *“Would you like to tell me how the situation looks to you?”*

Stage 6: Close the Conversation

Best Practices for Closing the Conversation

- Avoid letting the conversation drag out: Look for signs of a natural ending where the message has been delivered and received.
- Clarify next steps and actions that each of you can agree to take.
- Look for ways to end on a positive note.
- Offer the person the chance to add anything that may have been missed.

Top 5 Customer Service Traits

1. Stay Calm Under Pressure/Emotional Stability

A Service Recovery Practitioner should be able to stay calm under the different pressures he or she may experience during the course of their work.

Possessing great listening skills is a great asset as it is the right of a customer to be heard and his request/issues attended. Hence, it is essential that Service Recovery Practitioners remain detached while actively participating in the conversation and do not take things personally.

2. Critical Thinking and Creativity

A Service Recovery Practitioner should have the ability to think critically and come up with creative solutions for the resolution of tricky customer issues; the ability to examine situations and come up with solutions that best fit.

3. Empathy and Friendliness

Exceptional customer service by a Service Recovery Practitioner must reflect genuine interest and empathy when dealing with customers. Service Recovery Practitioners are the face of the VA when making calls and hence need to radiate warmth, genuine interest, concern and understanding of customers and their issues.

4. Effective Communication Skills

Excellent communication skills really make a difference to the quality of customer service. Communication skills include not just good diction and speaking skills but also good listening abilities.

5. Adaptability: Able to see the Picture

A Service Recovery Practitioner should be able to see how their role is tied in the company's brand image and reputation. Seeing the big picture and how they fit into the company's success will drive them to do their best.

Veteran Suicide Facts

A 2017 study reports roughly 17 Veterans commit suicide per day. This data excludes active-duty service members, National Guard, and Reserve members (never federally activated).

*The data below excludes active-duty service members, National Guard, and Reserve members (never federally activated). 2017 is the latest year of available data, and in this year, more than 6,139 Veterans committed suicide: 13.5% of suicides in America. Veterans make up 7.9% of the US population.

A new report shows that suicide among Veterans continues to be higher than the rest of the population. The suicide rate among male Veterans was 1.3 times the rate for other adult men in 2017. The rate among female Veterans was 2.2 times the rate for other adult women that year.

62 percent of Veterans who took their own lives in 2017 were not receiving VHA services.

The highest suicide rate was among younger veterans, ages 18 to 34. In 2017, there were 44.5 suicides for every 100,000 veterans in that age group. Roughly 38 percent of all Veteran suicides in 2017 were for individuals 50 years or older.

**2019 National Veteran Suicide Prevention Annual Report*

VA & Suicide Medical Support

VA is committed to improving access to mental health care and has filled nearly 4000 mental health positions nationwide since 2017. Providing nearly 120,000 more Veterans access to mental health services each year.

VA has placed at least one Suicide Prevention Coordinator at each VAMC and in the largest community outpatient-based clinics across the country to ensure Veterans receive the counseling services and support they need.

Suicide Prevention Coordinators are responsible for meeting with Veterans referred from the Veterans Crisis Hotline and other VHA facility staff, coordinating the care for high-risk patients, educating and training facility staff on suicide risk factors and warning signs, and conducting outreach and education about Veteran suicide in the community.

There are also community-based Vet Centers and Mobile Vet Centers (MVCs) across the country that provide a broad range of free counseling, outreach, and referral services to combat Veterans and their families. The VET Center Staff is available toll-free 24 hours a day at 877-927-8387.

Communication

VA has taken several initiatives to reach Veterans and make them aware of the assistance available to them, should they suffer from suicidal thoughts. One method of reaching Veterans is advertising the Veterans Crisis Line throughout several VA websites, including:

- [MyhealththeVet](#)
- www.va.gov
- [Department of Veterans Affairs – Mental Health Resource Webpage](#)

Veterans Crisis Line

The Veterans Crisis Line connects Veterans in crisis their families and friends with qualified, caring Department of Veterans Affairs responders through a confidential toll-free hotline, online chat, or text.

Veterans and their loved ones can reach the Veterans Crisis Line by:

- Dialing **988** to reach the National Suicide Prevention (Lifeline) national network and **Press 1**,
- calling **1-800-273-8255** and **Press 1**,
- chatting online at [Chat \(veteranscrisisline.net\)](https://www.veteranscrisisline.net), or
- sending a text message to **838255** to receive confidential support 24 hours a day, 7 days a week, 365 days a year. Support for deaf and hard of hearing individuals is available.

When a crisis is identified during a service recovery call, the Service Recovery Practitioner may provide a warm transfer to **1-585-393-7938**. This number should **only** be used for VA transfers.

State Resources

Suicide.org provides information for each state suicide prevention hotline and resources.

Talking to a Veteran about Safety

For a Veteran that may be faced with troubling thoughts or going through a hard time, a safely stored firearm can be a life saver. [The Start the Conversation: Talking to a Veteran When You Are Concerned Fact Sheet](#) provides insight into how to start a difficult conversation and gives examples of questions you can ask to obtain the information you are seeking.

Suicide Prevention Framework

VBA's Suicide Prevention Framework goal is to expand lethal means safety initiatives and opportunities by partnering with VHA and members of local communities on lethal means safety and gun lock distribution. All regional offices received a supply of gun locks for distribution.

Purpose:

- Nearly half of all Veterans own a firearm, and most Veterans are dedicated to firearm safety. Firearm injuries in the home can be prevented by making sure firearms are unloaded, locked, and secured when not in use, with ammunition stored in a separate location.
- Practicing safe storage can decrease risk for suicide. Since many suicidal crises are brief, safe storage practices can save a life by increasing the amount of time and space between impulse and access to a firearm.

- Cable locks can be distributed to Veterans, family members, friends, and non-profit community Veterans programs with the goal of reducing risk of suicide and saving lives.

Gun locks may be distributed by the regional offices at outreach events, along with the brochure [Reducing Firearm & Other Household Safety Risks for Veterans and Their Families](#) or at the public contact office. Additionally, gun locks may be requested and provided during home visits by field examiners or for specially adapted housing visits. Veterans can also request gun locks at their local VA Medical Center through the Suicide Prevention Coordinator.

Understanding Suicide: Risk Factors, Warning Signs, and Triggers

Risk Factors vs. Warning Signs

- Risk factors are circumstances or characteristics that increase vulnerability and the likelihood that an individual will consider, attempt, or die by suicide.
- Risk factors occur on various levels, such as individual, family, and community.
- Those individuals exposed to multiple risk factors are at a higher risk for developing suicidal behavior than individuals who are exposed to very few or no risk factors.
- Warning signs can be displayed in changes in mood or behavior. – Substance use disorder
 - Sleep disorders
 - PTSD
 - Chronic Pain

Other related factors:

Veteran Specific Risk Factors

Veteran-specific Risk Factors continue to be researched; some common themes are:

- Exposure to extreme stress
- Post-Traumatic Stress Disorder (PTSD)
- Military Sexual Trauma (MST)
- Service-related injuries, including Traumatic Brain Injury (TBI)

Veteran Risk Comparison

Among deployed and non-deployed active-duty Veterans who served during the Iraq or Afghanistan wars between 2001 and 2007, the rate of suicide was greatest the first three years after leaving service, according to a study. Compared to the U.S. population, both deployed and non-deployed Veterans had a higher risk of suicide, but a lower risk of death from other causes combined. Deployed Veterans also had a lower risk of suicide compared to non-deployed Veterans.

Additional data provided in 2019, shows a reduction in the number of Veteran suicides. Data released in 2021 as part a report outlining the *President's New Strategy Outlines Five Priorities for Reducing Military and Veteran Suicide*, reaffirmed the downward trend in Veteran suicides. In this report financial strain, housing, food insecurity, unemployment and Legal Issues are listed as the most concerning issues and factors facing Veterans contemplating suicide.

Taking Action to Assist At-Risk Individuals

Operation SAVE

S: Know the Signs of Suicidal Thinking

Remember the risk factors and warning signs that were discussed to help determine if the Veteran may be suicidal.

A: Ask Questions

Don't be afraid to ask the question, "Are you thinking about committing suicide?" or some variation.

V: Validate the Veteran's Experience

Talk openly about suicide. By being willing to listen and allowing the Veteran to express his or her feelings, it validates the Veteran's experience. It lets the Veteran know that you recognize that the situation is serious and you are not passing judgment on them. Also, you reassure them that help is available.

E: Encourage Treatment and Expedite Getting Help

Don't keep the Veteran's suicidal behavior a secret. Do not leave him or her alone. Try to get the person to seek immediate help from VA's crisis hotline. We want to reassure the Veteran that help is available.

Things to consider when talking to a Veteran at Risk for Suicide

- Remain Calm.

- Get supervisory assistance.
- Listen more than you speak.
- Do not argue.
- Limit questions, allow the Veteran to speak.
- Use supportive and encouraging comments.
- Lead the Veteran to help.

Additional Resources:

- [VA S.A.V.E. Training](#)
- [SPMO Crisis Management Resource Help Sheet](#)
- [Learn how to talk to a Veteran in Crisis](#)
- [Service Recovery ToolKit](#)

Reminder: Complete the assessment questions and end of training surveys for the following training items to obtain TMS credit.

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**The Customer Service and Crisis Management Training provided by a collaborative effort between OTED & SPMO*