

# Quality Customer Interactions



## CPR Training- Communications

*An Educational Service Event provided  
by Compliance Improvement Services,  
Inc. in cooperation with Florida CCOC*



# What can CPR trained staff provide?

## C - Communication

*Communication through customer interaction drives results.*

Clerks working in compliance service find it difficult to engage in payment conversations with customers. It takes preparation, practice, and the right frame of mind to encourage payment plan participation. Communication training brings the “talk tools” necessary to succeed in payment plan counseling.

## P – Process

*Process improvements must align best practices for performance efficiency*

Process improvement doesn't wait for outcomes, but instead encourages more timely results. Compliance CPR Training focuses on improved payment plan enrollment, better notifications, and strategies that reduce customer defaults.

## R – Reporting

*Clerks must continually analyze reporting trends to measure workload, customer service, and revenue opportunities.*

Clerks collect case data that helps manage case progress, workload volume, and payment details. Using a solid set of compliance reports with an understanding of how to use them, clerks can analyze sooner, retool as needed, and plan better.



# Compliance CPR Training Schedule

In coordination with FL-CCOC, CIS has provided 6 regional site trainings for module 1 communications training. The commitment is for 1 day from 9 am until 2:30, maximizing time and minimizing travel for students.

## Module 1 - Communication

1. Tuesday, March 26<sup>th</sup> 9:00- 2:30 pm- Jackson County
2. Thursday, March 28<sup>th</sup> 9:00- 2:30 pm- Leon County
3. Tuesday, April 2<sup>nd</sup> 9:00- 2:30 pm- Duval County
4. Tuesday, April 23<sup>rd</sup> 9:00- 2:30 pm- Seminole County
5. Thursday, April 25<sup>th</sup> 9:00- 2:30 pm- Palm Beach County
6. Tuesday, April 30<sup>th</sup> 9:00- 2:30 pm- Charlotte County
7. Thursday, May 2<sup>nd</sup> 9:00- 2:30 pm- Pinellas County

## Module 2 – Process Improvement - Virtual

Module 2a May 14<sup>th</sup> - 9:30 am – 11:30 am- Process Improvement- via Zoom  
Module 2b June 13<sup>th</sup>- 9:30 am – 11:30 am- Process Improvement- via Zoom

## Module 3 – Reporting Analytics - Virtual

Module 3a May 21<sup>st</sup> - 9:30 am – 11:30 am- Reporting Analytics- via Zoom  
Module 3b June 27<sup>th</sup>- 9:30 am – 11:30 am- Reporting Analytics- via Zoom

## Module 4 – CPR Summary & Certificate Ceremony

Module 4- July 18<sup>th</sup>– 10:00 am – 12:30 am. Hybrid Seminole Co. on-site & Zoom



All regional students come together in modules 3 and 4 through zoom link presentations available at the desktop. Course sessions run two hours. Hybrid on-site & Zoom Meeting- Certificates awarded to all students successfully completing modules 1-4. Program ceremony awards certificates in person to all attending on-site.



[Compliance Improvement Services \(CIS\)](#) provides consulting and training from experienced professionals for courts and local government to help them achieve better compliance in the payment of fines and costs. Our emphasis is on helping our customers help citizens.


**Don Murphy** is the Chief Executive Officer for [Compliance Improvement Services \(CIS\)](#) which provides consulting and training for courts and local government. He is a Fellow with the National Center for State Courts and has over 25 years of court administration experience.

**Doug Isabelle** has been with the Florida Clerks of Court Operations Corporation, (FL-CCOC) since 2009. He brings to the CCOC nearly 30 years of experience in state and federal government and over 10 years with the Clerk's Association. Doug holds a Master's in Public Administration from Albany New York State University providing consulting expertise to CIS consulting and training projects.



Customer  
first  
thinking.

 kenna



Connecting your  
brand's purpose to  
people's lives

Help me Now!

This is Compliance Service

# Shortened Attention Spans



Plenty of Distractions

# More about Relationships



Trust over Time





From Defendant.....to Customer!



Changing your Perspective

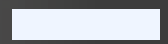


# Why Communications Training?



"No matter what job you have in life, your success will be determined 5% by your academic credentials, 15% by your professional experiences and **80%** by your communication skills."

Anonymous



What is our purpose?

Establish a Dialogue

# Module Objectives

1

Explain the importance of quality customer interactions through improved communications.

2

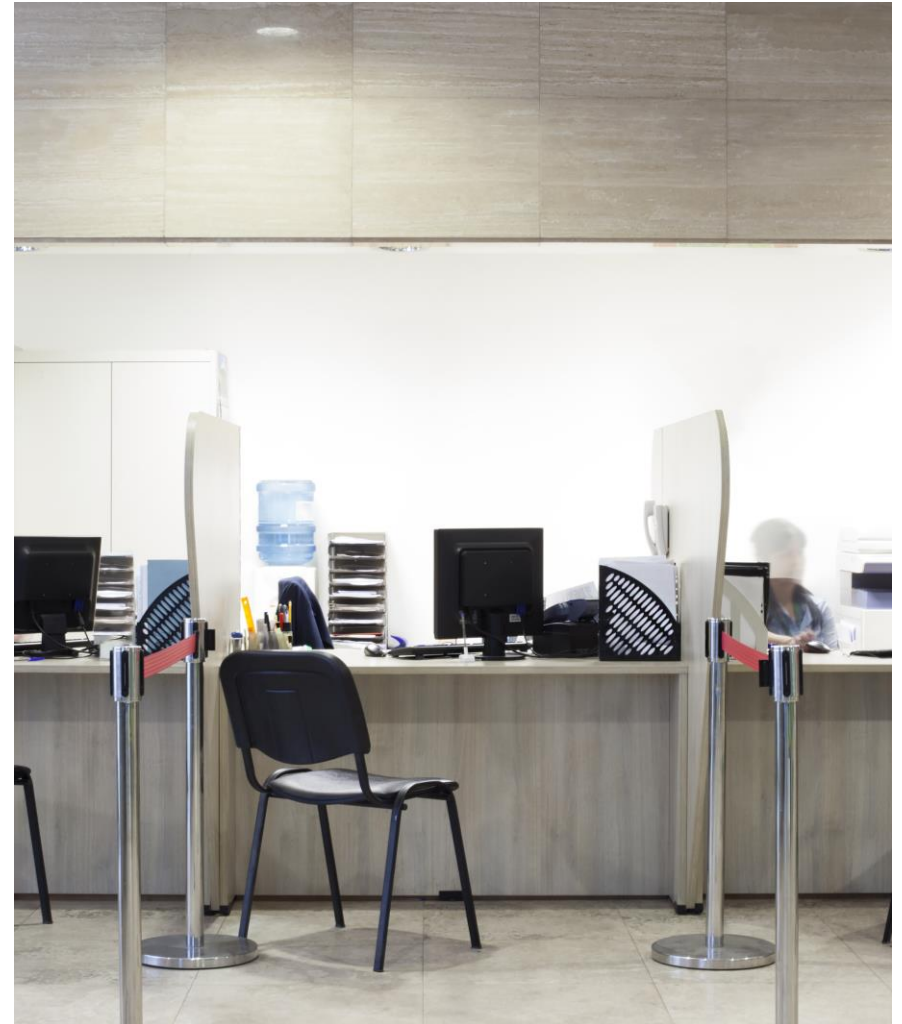
Learn the importance of listening to improve customer conversations.

3

Provide techniques to deflect challenging conversations and remain focused on purpose.

4

Define the right conversation to begin payment plan discussions.



A young woman with long brown hair, wearing a red and black plaid shirt, is shouting with her mouth wide open and her hand held out, pointing towards a cashier. The cashier, seen from the back, has long brown hair and is wearing a green top. They are in a retail store, with a computer monitor and keyboard visible in the foreground. The background is blurred, showing store shelves and bright lights.

The Customer is always right?



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But you can  
prove that the  
customer is  
indeed wrong.

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You can stand toe to toe debating why you are right, but it takes receptive listening to resolve the matter.



If escalation becomes necessary, a call to the supervisor restarts the process.





The supervisor then engages with the customer, empathetically listens and you hear those dreaded words.

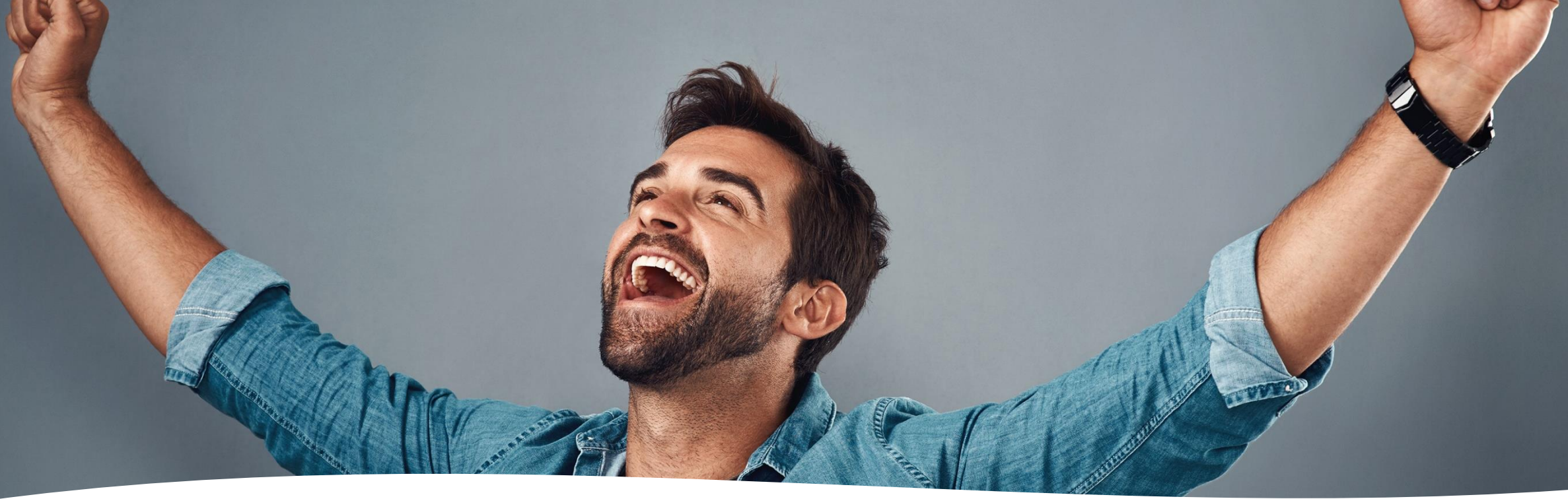
“I think you are right mam. We will work that out for you.”

# Why is the customer always right?

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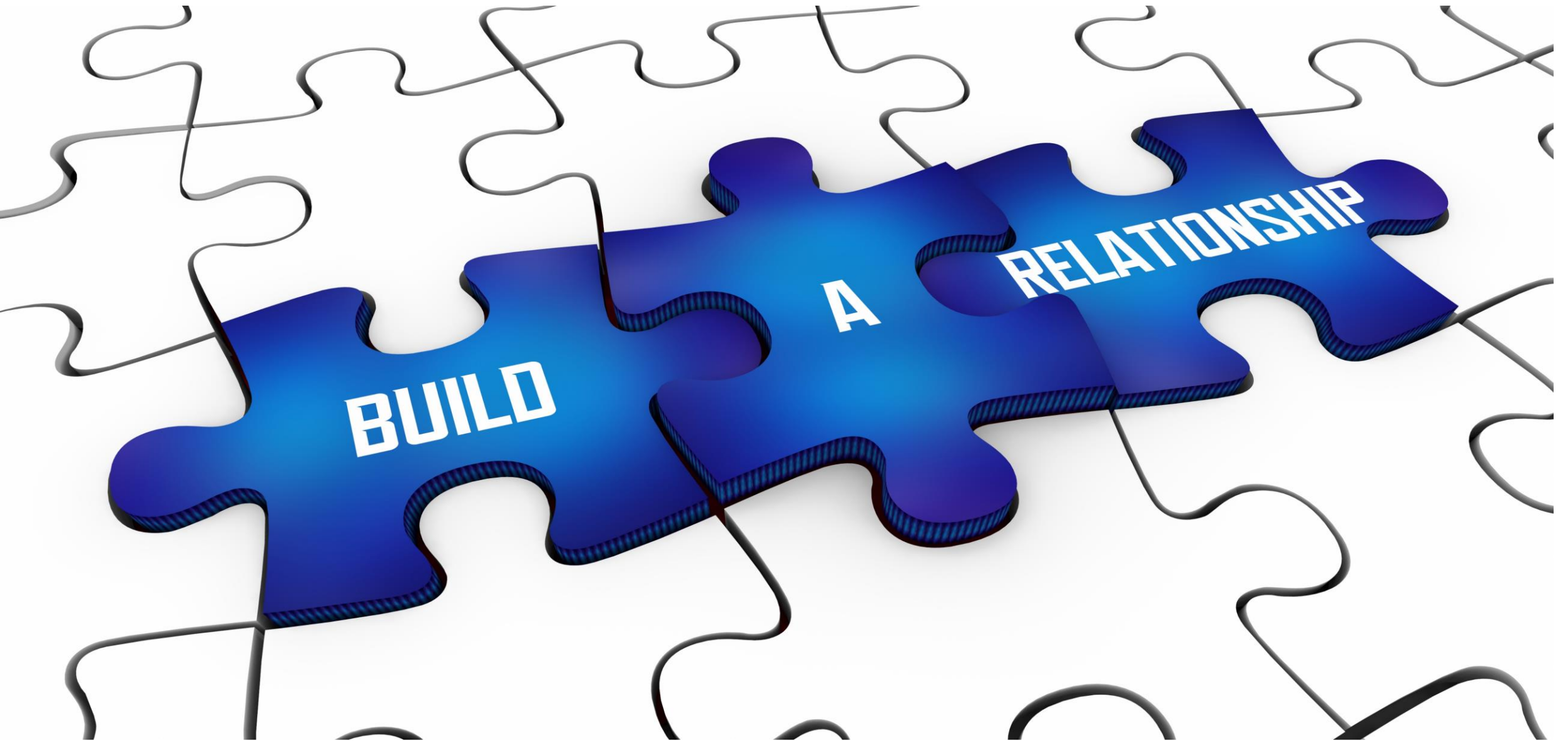
The supervisor then turns to you, tells you to fix it, apologizes to the customer for the inconvenience, and walks away.





Now the customer is happy.  
Some gloat about their vindication.

Let's try it differently!



# Customer Communication Techniques

The first step for improving a challenging situation is to make a better connection. “You do not know me.” Why should I trust you? Start by acknowledging them by name.

Call them by name





# Practice Reflective Listening

1. Seeking to understand a speaker's idea
2. Offering the idea back to the speaker
3. Confirm the idea has been understood correctly

# Understand their baggage

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Anyone walking out of a sentencing hearing is loaded with personal challenges.

If you acknowledge those challenges by how you respond back, through your demeanor, and how you listen, the situation will likely begin to diffuse.





## **Approach conversation as a first-time experience**

Thought you've heard it all? Maybe you've heard a lot, and this time feels quite familiar.

The quickest way for your customer exchange to breakdown is to talk down or appear disinterested in your customer's concerns.

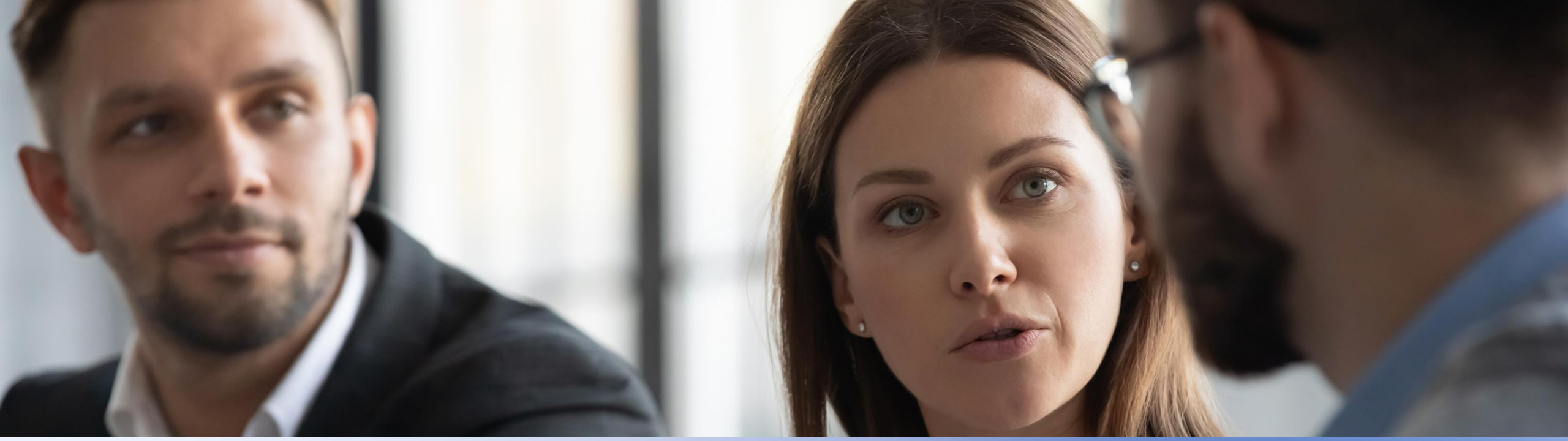


A close-up photograph of a person's hands holding a single puzzle piece. The hands are positioned over a large, shallow tray filled with many other puzzle pieces of various colors (blue, brown, yellow, green). The background is blurred, showing what appears to be a person's torso in a light-colored shirt. The overall scene suggests a process of breaking down a complex task into smaller, manageable parts.

# Break it down

Avoid solving the problem before you know what it entails. The situation is most likely more complex.

In a repayment counseling conversation, you are looking to see if terms can even be started, and participation may be the first block to begin a payment plan agreement.



## Use Empathy

Empathy is generally described as the ability to take on another's perspective, to understand, feel and possibly share and respond to their experience.

[Wikipedia](#)

What does it mean to use empathy as part of customer service conversations?

# Stay Calm

Just being right doesn't effectively close a conversation.

Staying calm, sorting through options, carefully listening improves the situation.



When you are in control it adds credibility that you understand the problem and you are there to solve it.

Understanding  
That's all everybody wants.

# Take a break

It takes a lot to resolve an angry conversation. Staying the course, using communication diffusing tools you can solve the problem and gain the confidence of your customer.

To ensure you stay ready for the next round should it come your way, take a break. Reset your thoughts and focus on how to create continuous positive outcomes.



[8 Proven Psychological Strategies To Deal With Angry, Emotional or Difficult Customers - crowdspring Blog](#)

# Common mistakes in customer interactions

- ① Not listening to the customer.
- ② Asking irrelevant questions.
- ③ Getting sidetracked on other issues.
- ④ Being rude, defensive, or argumentative.



# Atmosphere of Trust

## Customer Observes Empathy



Opportunity to explain and be heard

Receives clear instructions with options

Clerk waits to confirm understanding

Offers continuous help during process

**Sets trust environment for future**

An overhead view of seven people sitting around a long wooden table. In the center of the table is a large white thought bubble containing the text "CPR Table Talk 1". Several smaller white circles are scattered around the bubble on the table surface. The people are dressed in casual attire, including sweaters, plaid shirts, and button-down shirts. They appear to be engaged in a discussion or meeting.

**CPR Table Talk 1**

# The Customer is always right

You have a demanding customer. Records show there hasn't been a payment made in 90 days. It is difficult to convince them otherwise.

What are the first steps you should take to diffuse the situation?

What steps would you take to ensure you've heard the customer?

What should you offer to resolve the matter and restart the payment plan process?



**“Perhaps you would like to rephrase your last answer.”**



# Practice Reflective Listening



1. Provide an example of working with a customer situation by listening first and then working to resolve the matter.
2. After carefully listening what steps did you take to resolve the issue?

# Consider your experiences



As part of your experience describe one of your more challenging customer experiences. What was the issue you encountered? How did you attempt to solve it? Looking back what would you do differently?

# 7 Techniques to train active listening skills

1

## Technique Paraphrasing

### Purpose

- Convey Interest
- Encourage the speaker to keep talking

### To achieve it

- Restate the information just received with your own words.

### Examples

- “So, you couldn’t get away from your job to take care of things until now.”



2

## Verbalizing emotions

- Show that you understand
- Help the speaker to evaluate their own feelings

- Reflect the speaker’s basic feelings and emotions in words

- “And you felt like people were not hearing you.”

# 7 Techniques to train active listening skills

3

Technique	Purpose	To achieve it	Examples
Asking	<ul style="list-style-type: none"><li>• Get more information.</li></ul>	<ul style="list-style-type: none"><li>• Ask questions.</li></ul>	<ul style="list-style-type: none"><li>• “And after that, the call operator ignored what you were explaining.”</li></ul>



4

Summarizing	<ul style="list-style-type: none"><li>• Review progress</li><li>• Pull together important ideas</li><li>• Establish a basis for further discussion</li></ul>	<ul style="list-style-type: none"><li>• Restate major ideas expressed, including feelings.</li></ul>	<ul style="list-style-type: none"><li>• “These seem to be what has kept you from solving your problem.”</li></ul>
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# 7 Techniques to train active listening skills

Technique

Purpose

To achieve it

Examples

5

Clarifying

- Clarify what is said
- Help the speaker see other points of view.

- Ask questions for vague statements.
- Restate wrong interpretations to force further explanation.

- “You said that you reacted immediately. Was this still on the same day?”



6

Encouraging

- Convey interest
- Encourage the speaker to keep talking

- Disagree
- Use varying intonations
- Offer ideas and suggestions.

- “Then you were excused from court without understanding what to do next?”

# 7 Techniques to train active listening skills



7

## Balancing

- Get more information
- Help the speaker evaluate their own feelings.
- Ask questions
- “Was waiting to be heard worse than not being taken seriously?”

# The Value of Listening



# Listening Exercises



Repeat after me the word spot five times

What do you do at a green light?

What does r.o.a.s.t. spell?

What does c.o.a.s.t. spell?

What do you put in a toaster?

If you take two apples from three apples what do you have?



Better listening skills will improve customer service by helping you:



- Establish empathy
- Solve problems
- Keep the focus on the customer
- Get valuable customer feedback



Better listening improves customer responsiveness, as customers feel valued and respected when heard and responded to.



It avoids customer crisis as you resolve issues before they escalate and damage your reputation or that of your office.

Focus on the person as well as the problem. Nobody likes to hear, "I told you so."



# Being a good listener is key to effective customer service

1. Helps establish trust
2. Builds relationships
3. Leads to better outcomes



[Learn More](#)

[The Importance of Listening Skills in Customer Service](#)

# Pay Attention

1. Listening can't even begin to start if you haven't provided the opportunity for customer conversation.
2. First impressions matter. Walking up to a clerk that clearly prioritizes everything, but her customers is a problem.
3. If service is important that fact must be clearly visible to your customers.



# Who is paying attention?

Vacation  
time soon!

Wonder what  
they are doing  
at home!

I have 5 jobs.  
customer  
service can  
wait.

Seven months, 13  
days, 5 hours,  
That's all I have to  
wait!



# Don't Interrupt

Online support is practically the only way to get help on product problems and service issues.

A common challenge is getting to the point of the problem. Is it the customer issue or the call center checklist?

Many times, the operator reads through a list that doesn't apply to what the customer needs and wants.

Talking over customers often occurs. Hearing the issue becomes secondary causing delays or unresolved issues.







Before getting into your story listen to your customer.

Listen for constraints that limit repayment and what can be done.

Give your customer the benefit of hearing them.

“I understand what you are saying. This is what I can do for you today.”





**CPR Table Talk 2**

# Walking in their shoes

The purpose of this exercise is to put yourselves in the shoes of the ones coming in to pay. What hinders them from being successful? Considering that, what is realistic to manage their requirement for repayment?



**CASE FACTS:** Customer Cynthia is coming down from court. She's just been sentenced and must pay a \$500 fine. Cynthia is overwhelmed by debt in her life. Besides paying her court sentence, she owes rent and attempts to keep her broken down car on the road in order to maintain a minimum wage part-time job.

She can't afford to lose her job and she can't afford to pay her court fine. What are her obligations and what can be done to help her keep her payment plan up to date and paid on time?

Make a list of the options you would use that would maintain your duty as a compliance specialist and help Cynthia

## Communication Techniques

- First Impressions Matter
- Customers feel valued when heard
- Focus on the Person
- Encouraging Customers builds trust

# Shop Talk

## What is your approach?

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While the conditions to initiate payment plans are similar, there is a uniqueness based on your customer base, caseload, judicial practice, and staffing approach to compliance. How do you get things started? Provide an example of a recent payment plan enrollment experience.





## **Make a Note**

## **The Value of Listening**

### **Active Listening**

- When you actively listen, you gain a full understanding of the situation.

### **Effective Customer Service**

- Being a good listener helps build trust and leads to better outcomes.

### **Listening to Customers is Vital**

- Establishes empathy
- Solves problems
- Keeps the focus on the customer

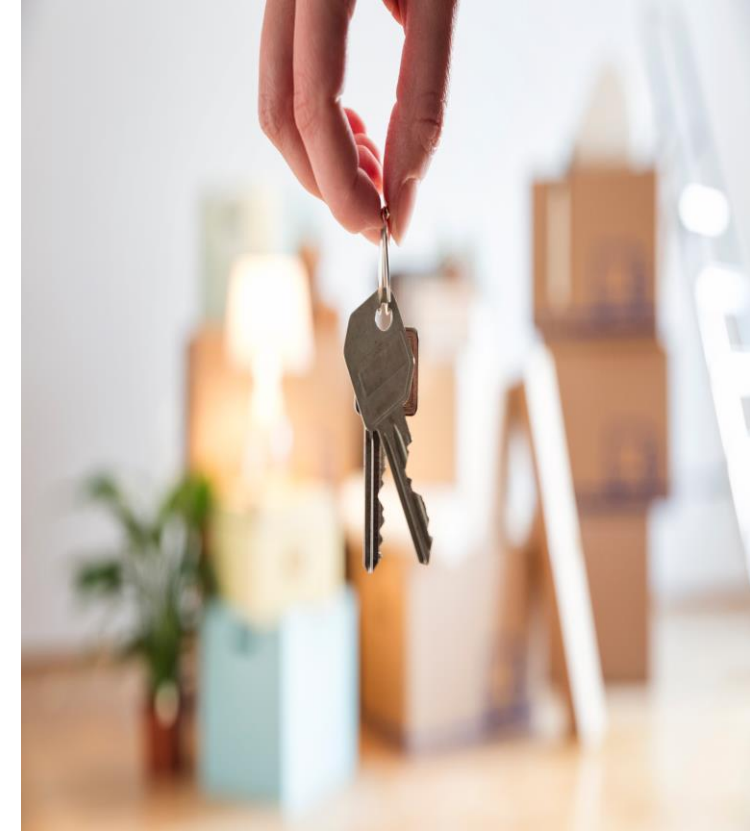
# So, you have never negotiated?



What you will and will not eat.



When to get up and when to go to bed



When we get to drive the car



How much and when you will pay



Negotiating is knowing what you can give to gather what you need



Time

Resources

Money

How much are you willing to pay today?

What time will you make your payments?



Technically, you are late, let's see what we can do today

The first thing to know is what you have the authority to negotiate



The second thing is what am I trying to achieve

**Florida Statute 938.30 (9) *The clerk of the court shall enforce, satisfy, compromise, settle, subordinate, release, or otherwise dispose of any debts or liens imposed and collected under this section in the same manner as prescribed in s. 938.29(3).***



Some money is better than nothing

Florida Statute allows negotiating money owed

Closing accounts helps you and your customer





**CPR Table Talk 3**

# Negotiate This

Frank has been dodging his obligation for five years. He'd like to move on from this. He's now going to see what the Clerk can do for him today.



**CASE FACTS:** Frank received a notice from the court about his overdue court fine. He's seen them before but this looked different. This time the Clerk suggested they would negotiate his payment balance provided he comes in willing to pay.

**Clerk challenge:** The compliance team is looking at closing out old payment cases. Statute provides the authority to reduce a payment balance. After notifying several past due accounts, Frank called the office and wants to negotiate. Take Frank through the process to present the negotiation and gain a payoff commitment.

## Negotiation Techniques

- Educate Customer on Payment obligation
- Provide negotiated payoff option
- Illustrate benefits over current plan
- Encourage commitment

# Negotiation Scenario

Frank owes \$1500 on a fine sentenced in his felony case over 6 years ago

To date only \$120 has been paid on the balance, the last payment made was 2 years ago

The clerk team uses negotiation guidelines to work with customers that could close out older cases

The clerk is willing to work with Frank to settle his felony case and the balance due of \$1380.

Frank's case is eligible for up to a 30% reduction

Discuss how you would negotiate Frank's case to closure including schedule

## Negotiation Guidelines

Age of Case	Waiver Collection Agent Fee	Waiver Interest from Lien	Reduction of Fine & Fee
5 yrs. or less	YES	YES	15% of balance due
5 to 10 yrs.	YES	YES	30% of balance due
Over 10 yrs.	YES	YES	50% of balance due



# Negotiation Scenario



How do you begin a conversation with Frank to begin a negotiation?  
Here's what I can do?

Frank can't pay off. The current balance is \$1380. 30% reduces fine by \$414 to \$966.

Frank says he can come up with \$800 today. This case hasn't seen any payments in 2 years. Frank's offer represents a 42% reduction

What is your counter? Take it? Drop initial offer to \$900? Or take the \$966 into a 90 day payment plan?

## DISCUSS

We all work the same rules for negotiation, but we all have unique approaches. It may be related to types of cases or approaches to discounting a balance based on amounts and age of case. What's your approach? Explain a recent negotiation you worked on. What were the conditions and how did the matter resolve?



# What we learned about Communication

The first step for diffusing a challenging situation is to build an environment of trust.

First impressions matter.

Your demeanor and how you listen will likely diffuse the situation.

While explaining matters, get to the point.

Negotiating is knowing what you can give to gather what you need



What can you do to improve communication?





# Going Forward

## Module 2 – Process Improvement - Virtual

Module 2a May 14<sup>th</sup> - 9:30 am – 11:30 am- Process Improvement- via Zoom

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## Homework & Handouts

Each session we will provide you with electronic handouts and homework. Use these materials to enhance your learning experience. Don't worry, the dog can't get to it.

And if you have questions between training events, email [dmurphy@complianceimprovement.com](mailto:dmurphy@complianceimprovement.com) or call (239) 470-3956

[Compliance Improvement Services – Secure](#)



### Module 1 - Communications Homework- (coming soon)

Tuesday, March 26th

Thursday, March 28th

Tuesday, April 2nd

Tuesday, April 23rd

Thursday, April 25th

Tuesday, April 30th

# CPR Homework

## Revisiting Communication Role Plays



1. **Angry Customer Replay**- Think about similar encounters you've had with angry customers. Based on what you've learned what would you do differently? What outcomes complicated what you did? How can you apply that to your office in the future?



2. **Listen & Learn Replay**- Think about similar encounters you've had while listening to customers. Based on what you've learned what would you do differently? What outcomes complicated what you did? How can you apply that to your office in the future?



3. **Negotiating Time Replay** - Think about similar encounters negotiating time payment terms with customers. Based on what you've learned what would you do differently? What outcomes complicated what you did? How can you apply that to your office in the future?

# CPR Homework

## Revisiting Communication Role Plays



Confused Customer

4. **Confused Customer-** Think about similar encounters you've had with angry customers. Based on what you've learned what would you do differently? What outcomes complicated what you did? How can you apply that to your office in the future?



Customer is Right


5. **The Customer is Always Right-** Think about similar encounters you've had while listening to customers. Based on what you've learned what would you do differently? What outcomes complicated what you did? How can you apply that to your office in the future?



Reflective Listening

6. **Reflective Listening-** Think about similar encounters negotiating time payment terms with customers. Based on what you've learned what would you do differently? What outcomes complicated what you did? How can you apply that to your office in the future?





THE BEST  
WAY TO  
PREDICT THE  
FUTURE

IS TO  
CREATE IT



[Survey on  
Homework Page](#)



Find us at [www.complianceimprovement.com](http://www.complianceimprovement.com) or email at [dmurphy@complianceimprovement.com](mailto:dmurphy@complianceimprovement.com)

Send us your thoughts!  
What we did well, what we could do better.