

# Introduction to Troubleshooting Common Customer Service Problems



- **Scope:** recurring frontline issues, root-cause thinking, coaching workflows



- **Why it matters:** repeat contacts, churn risk, agent burnout, CSAT swings



- **Four-layer model:** symptom capture, root-cause isolation, resolution, follow-through



- **Role map:** frontline, support leads, quality teams, trainers



- **Baseline metric set** captured before and after training



- **Structure:** practice lab and 30-day action plan close the deck



# The Business Case: What Poor Troubleshooting Actually Costs



- ✓ Repeat contact rate: median around 23%; world-class below 10%
- ✓ Repeat contacts: 20-35% of inbound volume in most operations
- ✓ Each repeat contact costs \$8-\$15 more than first-contact resolution
- ✓ Two or more contacts: 2-4x higher churn within 12 months
- ✓ CSAT drops 18-24% at two contacts, about 35% at three
- ✓ Unresolved complaints spread far more negative word of mouth
- ✓ Doing nothing masks a system defect one upstream fix could remove

## REPEAT CONTACT RATE

Median around  
**23%**



World-class below  
**10%**

## COST IMPACT OF REPEATS



Each repeat contact costs

**\$8-\$15**

more than first-contact resolution



Each channel switch costs

**\$12-\$18**

more than staying in the same channel

## CHURN RISK



**2-4x**

higher churn within 12 months with two or more contacts

## CSAT DROP



Focus on What Drives the Cost



FCR



REPEAT CONTACT



CSAT



# Know the Problems Before You Fix Them: A Working Taxonomy

- Department-based lists fail:  
~40% of tickets land in Other or General within a year
- Tag three independent axes:  
intent, cause, outcome
- Intent: track my order, change my plan, get my money back
- Cause: product defect, unclear policy, our error, third party, human needed
- Outcome: refunded, replaced, credited, fixed, explained, declined, no action
- Cap each axis at twelve; tag at close, not at open
- Priority by impact and reversibility, not tone: quiet double charge is P1



# Five Failure Categories You Will Actually Meet



## 1. Product or service defects

the thing does not work as promised



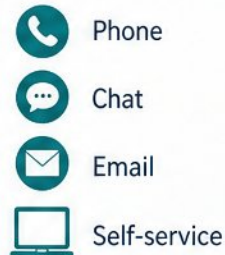
## 2. Process friction

extra steps, rework, and handoffs inflate a simple need



## 3. Policy constraints

agent sees the right answer, has no authority to give it



## 4. People and communication breakdowns

unacknowledged frustration, unclear language, missed commitments



## 5. Systemic failures

same symptom recurs across a cohort, device, version, or time window



**6. Misdiagnosis trap:** treating a relationship problem as technical, or the reverse

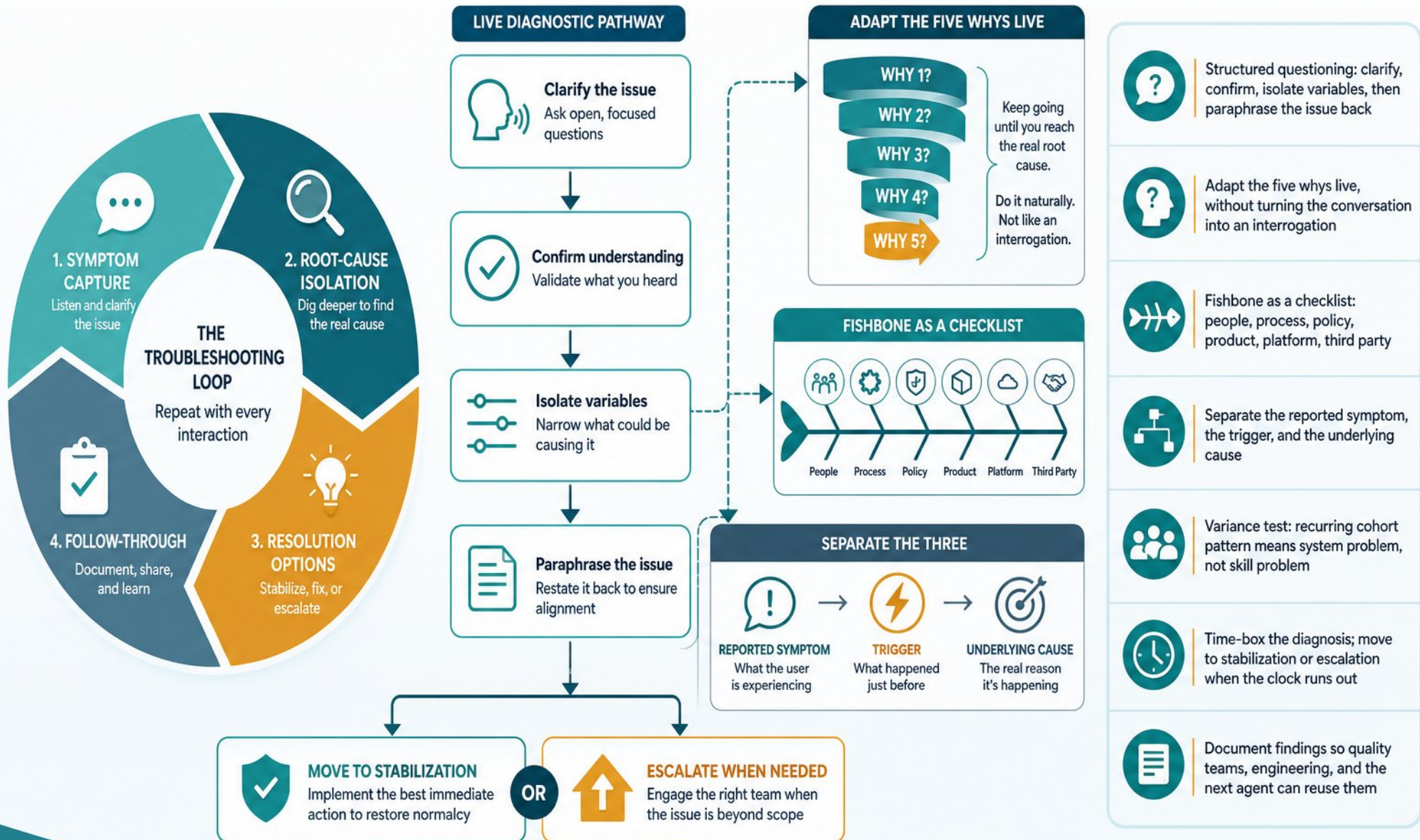


**7. Map categories** to ticket tags, quality reviews, and workforce planning





# Diagnostic Methods: Finding the Real Root Cause Under Pressure



# Avoid These Diagnostic Traps



| THE TRAP (COMMON MISREAD)                                                           |                                                                                | THE CREDIBLE READING                                                                 |                                                                                |
|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
|    | - Low CSAT often reflects a broken process, not weak agents                    |    | - Low CSAT often reflects a broken process, not weak agents                    |
|    | - Long handle time on complex issues is correct; track contacts per resolution |    | - Long handle time on complex issues is correct; track contacts per resolution |
|    | - Rising volume: split value demand from failure demand first                  |    | - Rising volume: split value demand from failure demand first                  |
|   | - Detractor comments show feelings, not facts; sample the worst decile         |   | - Detractor comments show feelings, not facts; sample the worst decile         |
|  | - Channel is rarely the constraint — the resolution path is                    |  | - Channel is rarely the constraint — the resolution path is                    |
|  | - Biases under time pressure: confirmation, premature closure, anchoring       |  | - Biases under time pressure: confirmation, premature closure, anchoring       |
|  | - Time-box the diagnosis; hand off cleanly when the clock runs out             |  | - Time-box the diagnosis; hand off cleanly when the clock runs out             |

# Handling Difficult Customers and High-Emotion Moments

## – High-Emotion Interaction Timeline



- Sequence that works: acknowledge, clarify, contain, commit, follow up
- Let customers vent fully, then pause two seconds before responding
- Validate the situation, not the emotion: "I can see why this would be frustrating"
- LEAP is the macro structure; 5 A's — Acknowledge, Apologize, Amplify, Ask, Act — are the precision tools
- HEARD recovery check: Hear, Empathize, Apologize, Resolve, Diagnose
- Inflammatory language: policy, deflection, minimizing, and "calm down"
- Calming language: personal ownership, accountability, specific validation
- Never use escalation mainly to escape an uncomfortable conversation



### INFLAMMATORY LANGUAGE

- policy
- deflection
- minimizing
- "calm down"

vs.



### CALMING LANGUAGE

- personal ownership
- accountability
- specific validation



# Protecting Agents: Boundaries, Abuse, and Duty of Care



- Define unacceptable behavior; state the boundary once, respectfully



- Channel-specific scripts: phone, live chat, social DM, in person



- End the interaction after threats, slurs, or continued profanity



- Document every incident: channel, time, what was said, outcome



- Managers must review incidents and follow up with the agent



- Emotional airlock between tough calls; keep a wins file

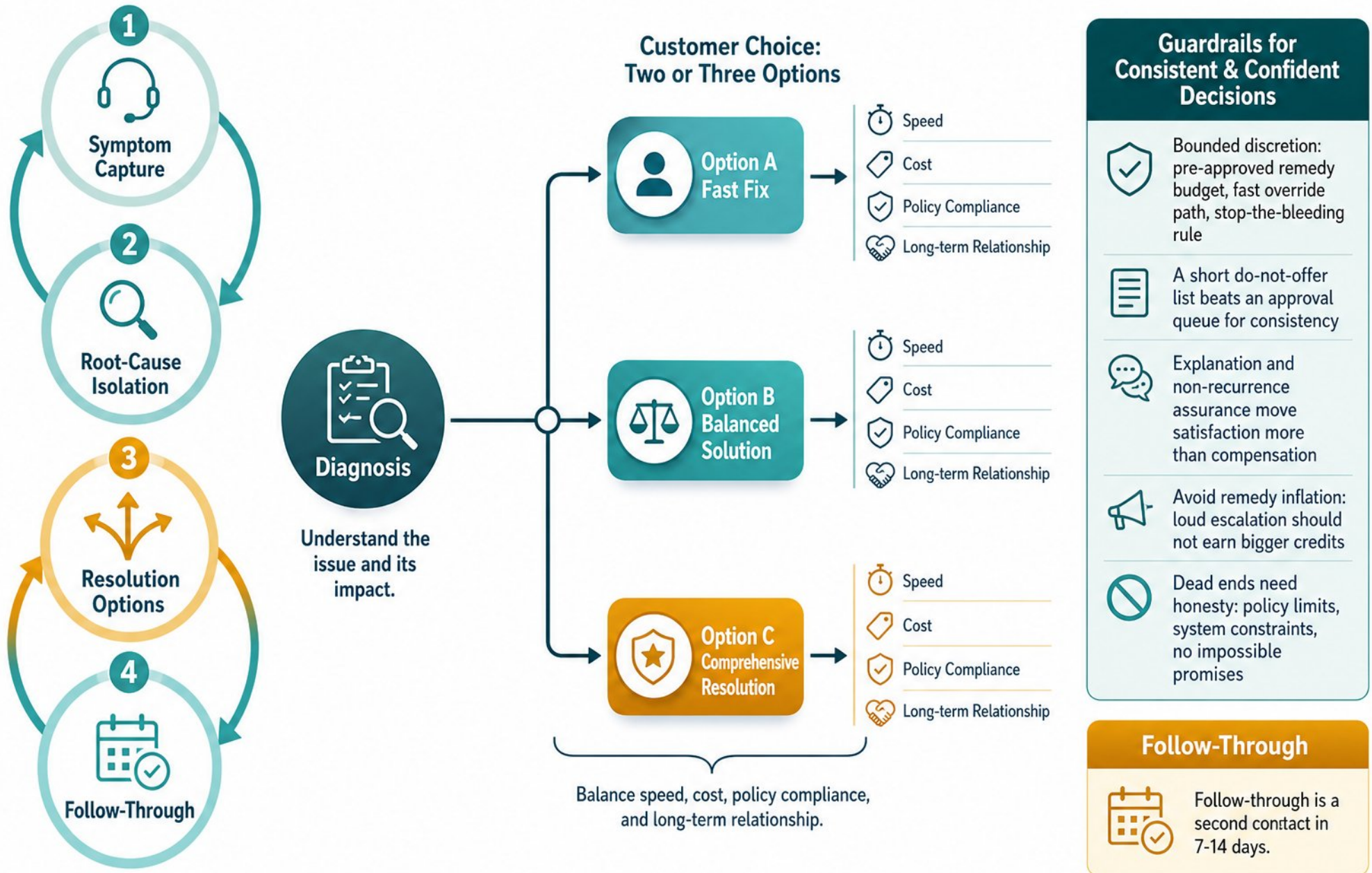


- About 80% forgive after very good recovery; 15% after poor

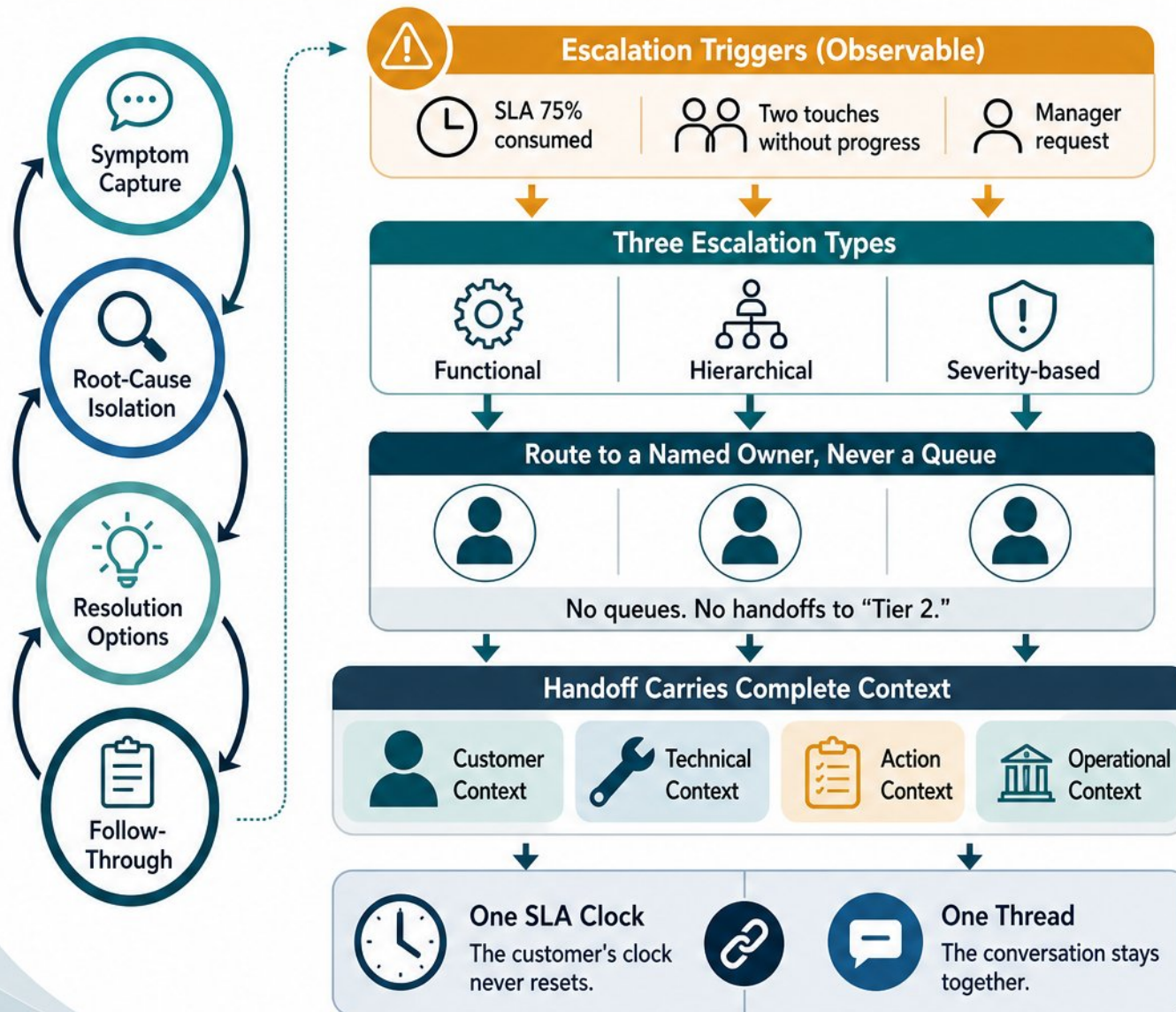


- Fix repeat failures instead of asking agents to absorb them

# Resolution Design: Options, Trade-offs, and Follow-Through



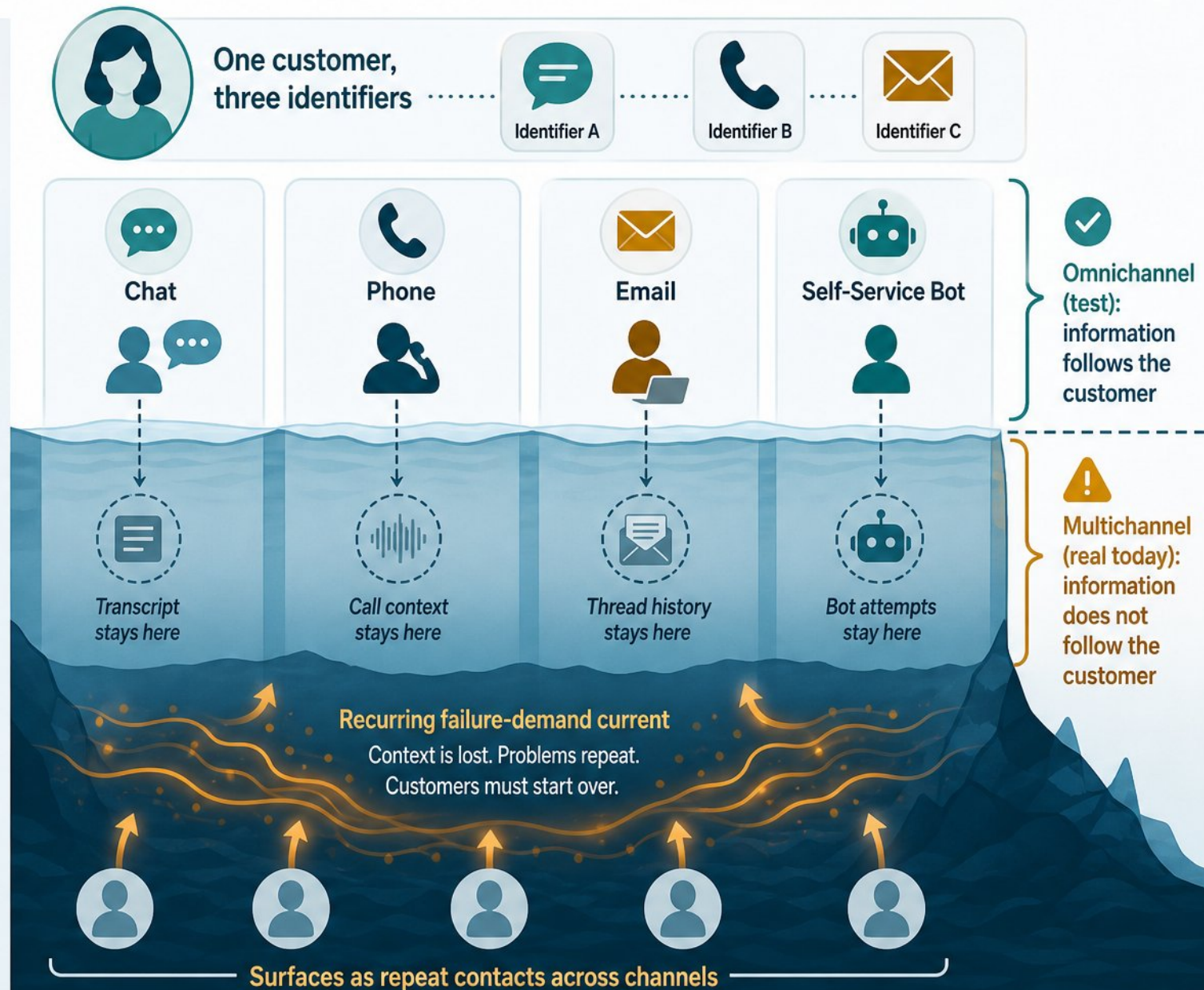
# When to Escalate and How to Hand Off Without Losing the Customer



- ✓ Triggers must be observable, never subjective: SLA 75% consumed, two touches without progress, manager request
- ✓ Plan three escalation types: functional, hierarchical, severity-based
- ✓ Route to a named owner, never a queue; "Tier 2" belongs to nobody
- ✓ Handoff carries customer, technical, action, and operational context
- ✓ Keep one SLA clock and one thread; the customer's clock never resets
- ✓ Cadence updates hold even when the news is "no update yet"

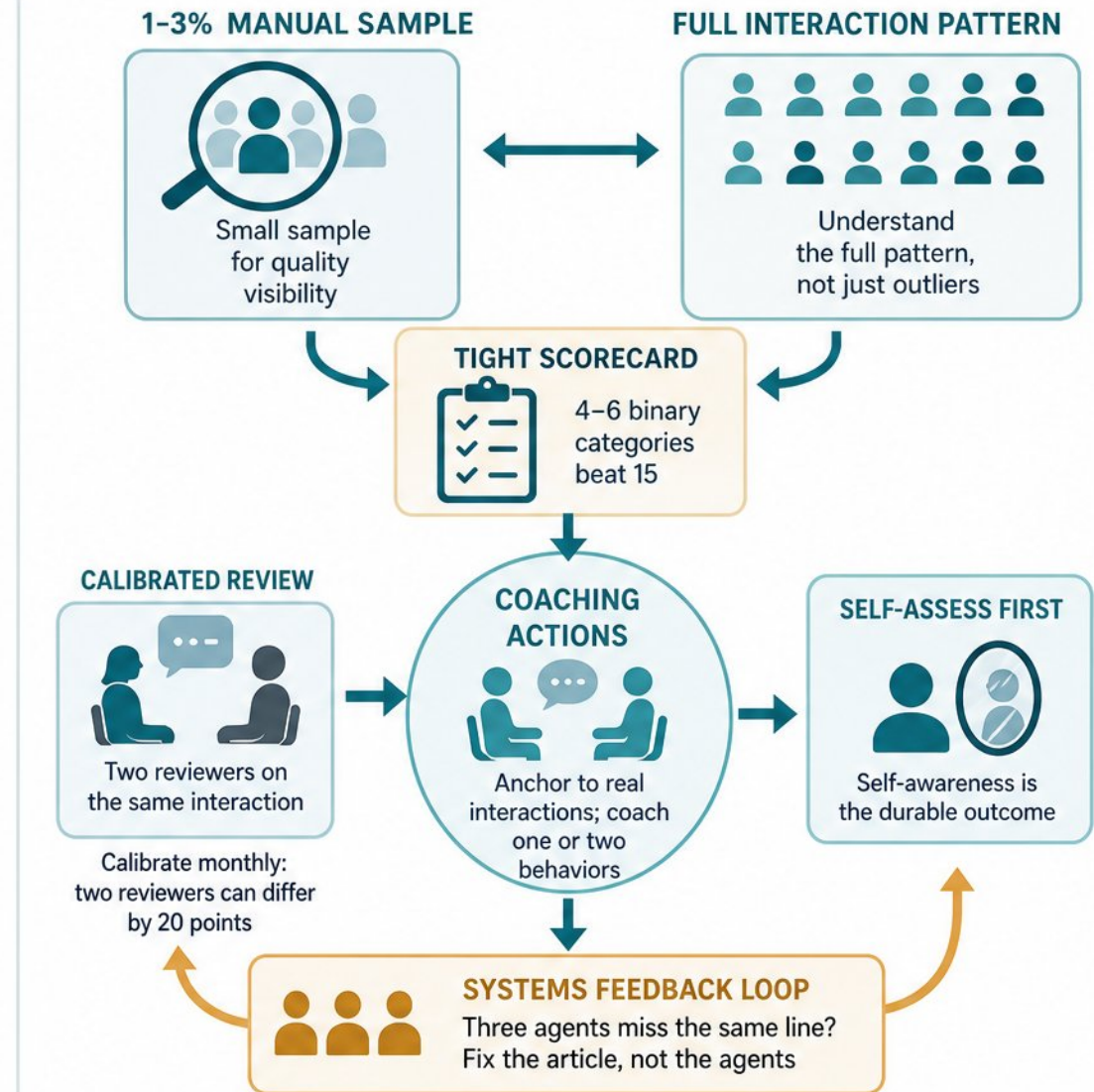
# Channel and Tooling Problems: Phone, Chat, Email, and Self-Service

- Channel failure points: voice routing, chat drop-offs, email threading, bot dead ends
- Omnichannel test: can phone agents instantly see chat transcript and bot attempts?
- Identity resolution is the usual root cause: one customer, three identifiers
- Tooling failures often masquerade as human service problems
- Feed self-service content gaps back to knowledge owners
- Track metrics per customer: cross-channel resolution rate, CES by journey



# Coaching and Quality: Turning Troubleshooting Data into Skill Growth

-  - Manual QA sees 1-3% of interactions: coach outliers, not patterns
-  - Tight scorecard: 4-6 binary categories beat 15; review quarterly
-  - Calibrate monthly: two reviewers can differ by 20 points
-  - Anchor sessions to real interactions; coach one or two behaviors
-  - Let agents self-assess first: self-awareness is the durable outcome
-  - Cadence by segment: weekly new, bi-weekly developing, monthly strong
-  - Three agents miss the same line? Fix the article, not the agents
-  - Track results: post-coaching QA, repeat defect rate, sentiment, repeat contacts



FCR



REPEAT  
CONTACT

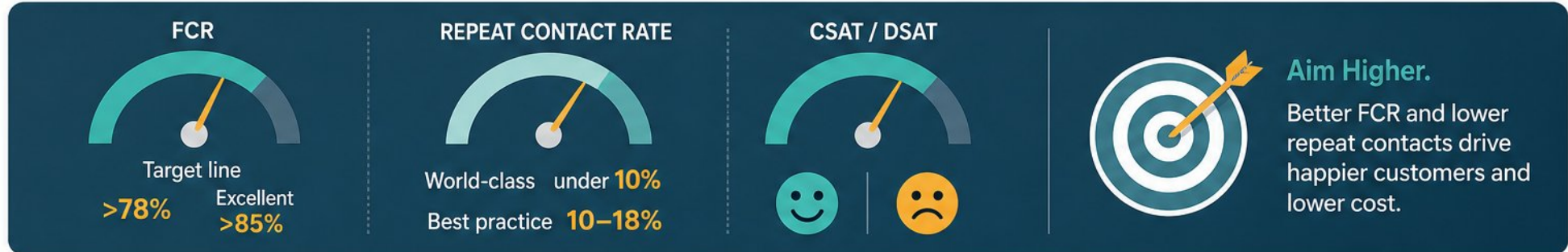


CSAT

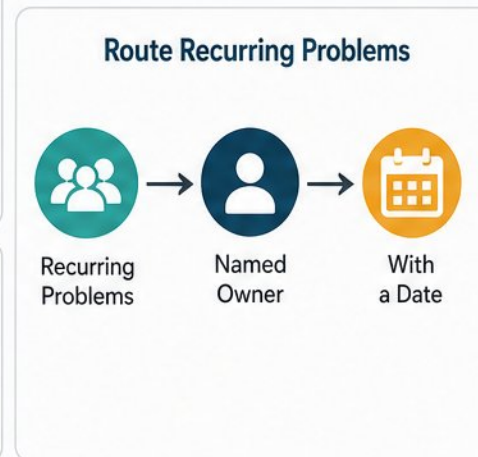
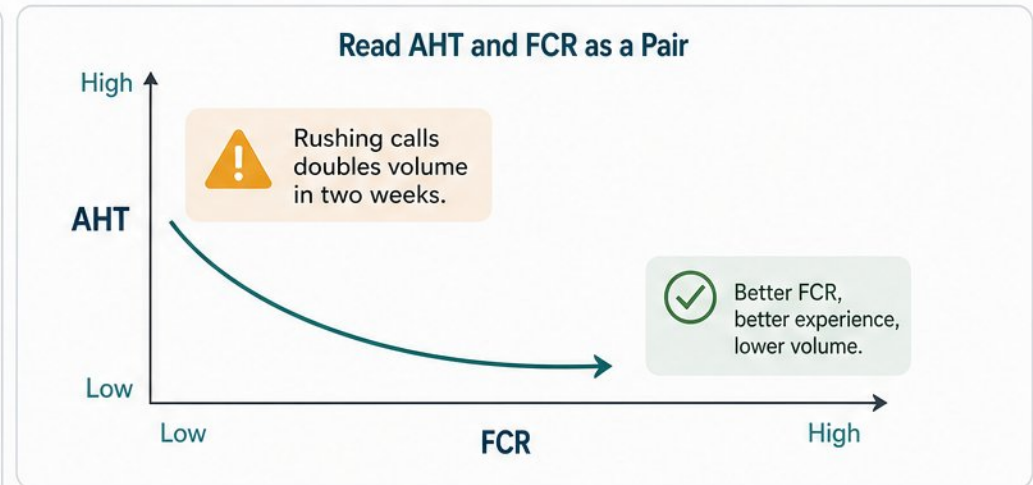


SENTIMENT

# Measuring Impact and Preventing Recurrence



- ✓ Core metrics: FCR, repeat contact rate, escalation rate, CSAT/DSAT, reopen rate
- ✓ Global FCR average ~72%; good >78%, excellent >85%
- ✓ World-class repeat contact rate under 10%; best practice 10-18%
- ✓ Read AHT and FCR as a pair: rushing calls doubles volume in two weeks
- ✓ Route recurring problems to a named owner with a date
- ✓ Prevention loops: policy updates, knowledge content, product fixes, training
- ✓ Highest-trust message: "You told us X in March; we changed Y in April"
- ✓ Read the before-and-after scorecard at 90 days, not 30



# Practice Lab: Applied Troubleshooting Scenarios and 30-Day Action Plan



## Scenario 1

high-value customer,  
recurring issue,  
threatened renewal



## Scenario 2

cohort billing failure,  
frontline absorbing  
failure demand



## Scenario 3

channel handoff  
breakdown, customer  
repeats everything



### TAXONOMY AXES

- Who is impacted?
- What type of issue?
- Where does it occur?
- When does it occur?
- Why does it happen?
- How is it handled?

- **Guided practice:** four-layer model, taxonomy axes, escalation triggers
- **Debrief:** what worked, what was missed, what changes next time
- **30-day plan:** one metric, one coaching habit, one prevention loop
- **Team commitments:** what managers, leads, and quality teams change
- **Follow-up checkpoint:** date set, evidence each of us brings back

## 30-DAY ACTION PLAN



### One Metric

Choose the metric that  
reflects our impact.



### One Coaching Habit

Practice the habit that  
builds capability.



### One Prevention Loop

Embed the loop that  
prevents recurrence.



### Follow-Up Checkpoint

Set the date and agree on the  
evidence we each bring back.

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