

The ONE Guide



For the moment someone comes to you and says, “I need help.” Something we can teach our agents, and something we need to use ourselves.

listen first

Let them unload before you go into action mode. They should feel heard. But sometimes listening is only half the battle.

then assess

Can they pull themselves onto the life raft if you throw it? Or do you need to get alongside them and help pull them up? Read their words, tone and body language.

O own this moment

Be fully present. Help them focus on what needs attention right now.

PICK THE STARTING POINT

- Nothing urgent? Give them the choice: “Where do you feel like you can start?”
- Too overwhelmed to choose? “Let’s start with this one.”
- Starting small helps them build momentum for the more complex issue.

WHEN TIME MATTERS

- Calm but firm: “I need you fully focused on this. We can deal with the rest later, but I need you with me.”
- Use “we” and “let’s.” Keep the attention on the issue in front of you. No blame.

N navigate the steps

Review the facts, use the tools, and help them find the path.

GET THE FACTS

- “What exactly is going on?”
- “What information have we confirmed with our system or the customer?”
- Trust the person, and verify the information.
- For a regular, documented issue, the path may already be in your tools and SOPs. Use them.

MATCH THE DIRECTION TO THE PERSON

- Probing: “Now that we’ve reviewed everything, what do you think we should do?”
- Directed: “Ask the customer these questions, then follow up with this department.”
- Provide the steps. They still have room to do their job.

E execute one action at a time

Make sure they know how to begin, and what comes after that.

GIVE THE FIRST STEP

- “Let’s start with this, and then let me know what happens.”
- If the sequence needs to be exact: “Remember: do one, then two, then three.”

CHECK BEFORE THEY GO

- “You know what to do?”
- “Want to go through it again?”

afterward, come back to the person

“You okay?” Review why you took each step so they understand the reasoning for the future. Thank them for bringing it to you.

if it keeps happening

Look beyond the individual case. When there’s no active customer case, break that type of issue down and practice the steps so they can handle it next time.

Listen and validate, but also help them make a plan.

Listening without action can leave someone stuck. Acting without support can miss the human being in front of you. Give them both.

Shmuel Saklad

The Leadership Hub

THELEADERSHIPHUB.ORG/ONE