Customer service role play scenarios: eight two-sided practice cards

Good customer service role play scenarios give the customer a hidden need, so the rep has to listen and ask before the contact can settle. This kit gives you eight fictional scenarios across phone, chat, counter and email, each with a rep brief and a hidden customer brief, a plain five-step de-escalation sequence, an observer tally and a 75-minute plan for trios. No card asks anyone to play or endure an abusive customer, and a separate table says when to end a contact or hand it over under your organisation’s policy.

75 minutes | 6–18 participants | Online and adaptable in person

Updated 2026-10-10

The outcome

By the end of 75 minutes each person in a trio has handled one customer contact as the rep, played one customer and observed one round, has a tally of what was heard with exact words and the customer’s level at the start and end, and has written their own words for the five steps and for handing a contact over.

Before the session

- For trainers and team leads who run customer service training with adults in phone, chat, front-desk or email roles, with 6–18 people in trios.
- Read “When to end the contact or hand it over”, then find your organisation’s policy on ending a contact and use its words where they differ.
- Pick three cards with “Choose three cards for your group”, plus one for the demonstration. Print rep and customer cards separately, or send each brief by private chat.
- Say in the invitation that the scenarios are fictional and nobody plays an abusive customer. Everyone stays seated, cameras are optional, and anyone may observe or take an email card instead.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- When to end the contact or hand it over
- The de-escalation sequence
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- Scenario cards: rep
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- Scenario cards: customer
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- Observer sheet
- Filled example: observer notes for card 1
- Facilitator section: run of show, reference tables, debrief and adaptations

When to end the contact or hand it over

Read this page first. No card in this kit asks anyone to play, or put up with, an abusive or threatening customer. At work, these situations call for a different step from de-escalation: end the contact, get help, or pass it to the right person.

Follow your own organisation's policy and local law, and use your organisation's words where they differ. This table is a guide for trainers, not legal, HR or safety advice. If someone is in immediate danger, call the emergency services.

Situation	What to do	Words you could use
The customer swears at you, insults you or makes personal remarks	Give one calm warning in your organisation's words. If it goes on, end the contact as your policy allows, record it and tell your team lead.	"I want to help with this. I can't carry on if you swear at me. If it continues, I will end the call."
The customer threatens harm, or you feel unsafe	End the contact or move away, and get help at once. Follow your safety procedure. If anyone is in immediate danger, call the emergency services.	No script. Your safety comes first.
The customer says that they or someone else is at risk	Follow your organisation's safeguarding or emergency route straight away.	"I want to make sure you get the right help. I'm going to …"
The request is above your authority (a refund limit, an exception)	Hand over to the person who can decide, with a short summary, so the customer does not repeat the story. Say when they will hear.	"My team lead can decide this. I'll pass on what you've told me, and they'll call you by 16:00."
A formal complaint, a legal claim or an allegation of discrimination	Log it and pass it to the complaints or legal route. Do not argue the merits.	"I'll log this as a formal complaint now. You'll hear from the complaints team within …"
The customer asks for a manager	Follow your policy. You may say what you can do first, but do not block the request.	"I'll ask my manager. Before I do, can I tell you what I can arrange now?"
You cannot confirm the caller's identity	Do not share account details. Follow your verification procedure.	"For your security I need to check two details before I can look at the account."
You feel unable to continue	Ask a colleague or team lead to take over. That is allowed and needs no reason.	"I'm going to bring in a colleague who can help."

The de-escalation sequence

Five plain steps for an upset customer on any channel. They were written for this kit. They are not a branded or validated model, and they do not promise that every customer will calm down. The steps can repeat.

Step	What you do	Words you could use
1. Let them finish	Hear the whole complaint before you reply. Note the facts: what, when, any reference. In chat and email, read the whole message first.	“Go on.” “Take your time, I’m noting it down.”
2. Acknowledge	Say back the problem and what it meant for the customer, in one sentence. Say sorry for the experience if it fits. Do not explain, argue or blame yet.	“You took the morning off and nobody came or called. That should not have happened.”
3. Check	Ask one or two questions to find the facts and what the customer needs most, and by when. Then summarise.	“What do you need to happen first?” “So it has to arrive by Friday. Is that right?”
4. Offer	Say what you can do, with a time. Give two options where you can. Say once, plainly, what you cannot do and why.	“I can book the last visit tomorrow, after 15:00. I can’t pay for lost earnings, but I can pass on a claim today.”
5. Confirm	Agree the next step: who does what, by when, and how the customer will hear. Give a name or a reference.	“You’ll have the email by 15:00 today. The reference is 4471.”

My phrase bank

Fill this in at the end of the session, in the words you would use at your own workplace. Keep it private, or share one line with the group.

Step	My words
1. Let them finish	
2. Acknowledge	
3. Check	
4. Offer	
5. Confirm	
Handing a contact over	
Ending a contact, in my organisation’s words	

Scenario cards: rep

Give this page to the rep only, or cut it into eight cards. All eight situations and organisations are fictional. The rep starts the contact, except on email cards, where the customer's email is on the card.

Card	What you both know	Your brief: only the rep reads this
1. The double payment **Phone**	A customer phones a leisure centre's membership line. Their bank app shows two monthly membership payments of the same amount, one yesterday and one today. The rep's screen shows one completed payment and one marked "pending".	The pending payment is a failed attempt. The bank releases it within five working days. You cannot cancel or refund a pending payment yourself. You can email a written confirmation, with a reference number, within the hour. Do not promise a date that the bank controls.
2. The missed repair visit **Phone**	A customer phones a home repair service. An engineer was booked to fix their washing machine between 08:00 and 12:00 today. Nobody came and nobody called. It is now 12:40.	Your screen shows that the engineer's van broke down at 09:30. The visit was marked "to rebook", but nobody told the customer. Free slots: tomorrow 13:00–17:00 or Monday 08:00–12:00. You can make it the last visit of tomorrow's slot (after 15:00) and ask the engineer to call 30 minutes before arriving. You can waive the call-out fee. You cannot pay for lost earnings; you can pass a written claim to the complaints team, who reply within ten working days.
3. The jacket for Saturday **Chat**	A customer writes in an online outdoor shop's chat. They ordered a waterproof jacket in size M. It arrived yesterday and it is too small. They want size L instead.	Standard route: a free return, and the exchange is sent when the return arrives, after five to seven days. Size L is in stock. You can also place a new order for size L with next-day delivery if ordered before 20:00, and waive the express fee once for an urgent exchange. Size M then comes back for a refund. Keep each message to two or three lines.
4. Locked out before the deadline **Chat**	A customer writes in the chat of a city council's parking permit portal. Their resident permit runs out at midnight tonight. They entered the wrong password three times and are now locked out.	You cannot unlock an account without checking identity. The usual route is a reset link to the registered email. If the customer cannot use that address, check three details instead: permit number, postcode and the month of the last payment. Then change the email and send a new link. A note that the customer tried to renew before the deadline gives 48 hours' grace from parking fines.
5. The cancelled evening class **Counter**	A customer arrives at the front desk of an adult education centre at 18:50 for a 19:00 pottery class. The class was cancelled this morning because the tutor is ill. A notice is on the classroom door.	The centre sent a text this morning to the mobile number on the booking. You can see that the number has a digit missing. You can offer a place in Thursday's class at the same time (two places left) or a refund for tonight's session. You can correct the phone number now. You cannot refund travel costs. You can offer a hot drink from the café while you sort it out.

Card	What you both know	Your brief: only the rep reads this
6. The room that is not ready **Counter**	A guest arrives at a hotel reception at 15:40. Check-in is from 15:00. Their room is still being cleaned.	Housekeeping says the room will be ready at about 16:20. You can store the luggage, offer the lounge, or book the small meeting room off the lobby free until 17:00; it has wifi, sockets and a door. You can text the guest when the room is ready. Only the duty manager can offer an upgrade, and they are busy until 17:00.
7. The refund that came back **Email**	A customer emails a theatre box office for the second time. Their show was cancelled 21 days ago, and the cancellation email promised a refund within 14 days. The second email says: “This is my second email. I was promised a refund within 14 days. It has been three weeks and nobody has replied. I want my money this week or I will make a formal complaint.”	Finance says the refund went to the booking card on day 9, but the card had expired and the money came back. The first email is still unanswered in a queue. You can arrange a bank transfer within three working days once the customer enters bank details in the secure online form, never by email. You can give your name and a direct address. The show has a new date in February; ticket holders can book first until 30 November. Reply in under 120 words.
8. The price promised on the phone **Email**	A customer emails an internet provider. On a call last month an agent promised them a lower monthly price for staying another year. The new bill shows the old price.	The account has no note of the offer, and you cannot apply a price that is not on record. You can ask for the call recording to be checked, which takes five working days. If the offer is confirmed, the bill is corrected back to the first month. Meanwhile you can apply the published loyalty price, lower than the bill but higher than the promised price. Reply in under 120 words.

Chat and email reply sheet

For chat cards in a room: one short message per box, then pass the sheet. For email cards: the rep writes the reply on the back, and the customer answers in one line below.

Who	Message
Rep	
Customer	
Rep	
Customer	

Scenario cards: customer

Give this page to the customer only, or cut it into eight cards. All eight situations are fictional. Share your hidden need when the rep's questions or words make room for it. Never use insults, swearing, threats or personal remarks.

Card	Your brief: only the customer reads this	What calms you, and what raises your level
1. The double payment **Phone** **Start at level 2**	You are worried more than angry. What the rep does not know: your rent leaves your account on Friday, and the second payment leaves you short. You need something in writing to show your bank, and a clear time frame. You do not need a refund if you can be sure the money comes back.	Calms: A plain account of what happened. Something in writing today. Being told before you are put on hold. Raises: "It's only pending, nothing to worry about." Being put on hold without warning. Being told to call your bank first.
2. The missed repair visit **Phone** **Start at level 3**	You start upset and firm: you took the morning off without pay. What the rep does not know: tomorrow you can be at home only from 15:00, and you cannot take another morning off. You need a visit after 15:00 tomorrow and a call before the engineer arrives. You may ask for a manager once.	Calms: Hearing early that nobody told you, and that this was wrong. A time window that fits your day. A call before the engineer arrives. Raises: Reasons before any apology. "The engineer was running late." Being offered Monday morning as the only choice.
3. The jacket for Saturday **Chat** **Start at level 1**	You are polite and in a hurry, typing on your phone at work. What the rep does not know: you leave for a walking trip on Saturday at 07:00. You would gladly pay for size L now and get the refund later, if it will arrive by Friday. You only need to know whether it will arrive in time.	Calms: A short answer to your real question: will it arrive by Friday? Being asked when you need it. Raises: A long block of policy text. A link to the returns page and nothing else. More than a minute with no message.
4. Locked out before the deadline **Chat** **Start at level 2**	You are frustrated and short. What the rep does not know: the registered email is an old work address that you can no longer open. You know the permit number (it is on the permit in your windscreen) and your postcode. You last paid a year ago, in October. Ask what happens if you are fined tonight.	Calms: Being asked whether you can still use that email before you are sent a link. Hearing that you will not be fined tonight. Raises: "Just click 'Forgot password'." Being asked for the same detail twice.
5. The cancelled evening class **Counter** **Start at level 2**	You are tired and annoyed. What the rep does not know: you travelled 50 minutes on two buses straight from work. Thursday suits you. What you need most is for someone to accept that your evening was wasted, and to know it will not happen again.	Calms: Being heard about the journey before any solution. Someone checking the phone number with you. Raises: "We did send a text." Hearing the rule about travel costs before you have asked about it.
6. The room that is not ready **Counter** **Start at level 2**	You are tired after a long journey. What the rep does not know: you have a video job interview at 16:30. You need a quiet place with wifi and a socket from 16:15. The room itself can wait.	Calms: A real time, not "shortly". Being asked what you need in the next hour. Raises: "Check-in is from 15:00, it can be later." Being offered the lounge, which is noisy, as the only choice.

Card	Your brief: only the customer reads this	What calms you, and what raises your level
7. The refund that came back **Email** **Start at level 3**	You are firm and upset. What the rep does not know: the tickets were a birthday present for your mother, and the show was the present. You need a reply that answers you in the first two lines, a date for the money and a named person. You will accept a bank transfer. You would like to know if the show has a new date.	Calms: Your question answered in the first two lines. A date and a named person. Not having to explain again. Raises: “Thank you for reaching out.” A reply that reads like a template. Being asked for booking details that were in both emails.
8. The price promised on the phone **Email** **Start at level 2**	You are annoyed but calm. What the rep does not know: you wrote down the agent’s first name and the date and time of the call, and you would gladly send them. You need to be believed enough for someone to check, and to know you will not lose money while they do.	Calms: Being asked for the details you kept. Hearing that the bill will be put right back to the first month if the offer is confirmed. Raises: “There is no record of this offer” as the first line. Any hint that you are not telling the truth.

Customer levels

For the customer player. Start at the level on your card. Go down one level when you hear something on your “calms” list. Go up one level, never above 3, when you hear something on your “raises” list. Tell the observer your level at the start, your highest level and your level at the end.

Level	How it sounds	For example
Level 1: annoyed	Polite, a little short. Explains once.	“I ordered the wrong size and I need to swap it.”
Level 2: frustrated	Short answers. Repeats the main point. Sighs, or uses capitals in chat.	“I’ve already said that. I need it by FRIDAY.”
Level 3: upset	Firm, louder voice. Asks for a manager or says they will complain.	“This is the second time. I want to speak to a manager.”
Never, at any level	No insults, swearing, threats or personal remarks. No accents or voices that mimic a group of people.	If you are unsure, stay at level 2.

Observer sheet

One sheet per round. Make a mark each time you hear the rep do one of these six things, and write exact words where you can. This is a count of what you heard, not a score of the person. A higher count is not always better.

Card: _____ Rep: _____ Customer: _____ Round: 1 / 2 / 3

What to listen for	Marks	Exact words
Acknowledged the problem and its effect		
Asked a question about facts or needs		
Summarised what the customer said		
Offered a specific option		
Said a limit plainly, with a reason		
Confirmed the next step with a time		

Customer level: start ____ highest ____ end ____. Words that raised the level:

_____

Did the hidden need come out? Which question or sentence made room for it?

_____

The next step: who does what, by when, and how the customer will hear

_____

One thing to keep and one thing to try

_____

Filled example: observer notes for card 1

A fictional round of card 1, “The double payment”, on the phone. Times heard: 10 in the round. All six behaviours were heard at least once (6 of 6). Customer level: start 2, highest 3, end 1, a change of 1 from start to end.

What to listen for	Marks	Exact words and notes
Acknowledged the problem and its effect	2	“Two payments a few days before your rent. I can see why you’re worried.”
Asked a question about facts or needs	3	“What do you need from us to sort it with your bank?” “When does your rent go out?”
Summarised what the customer said	1	“So the main thing is proof in writing before Friday. Is that right?”
Offered a specific option	2	“I can email you a confirmation with the reference within the hour.”
Said a limit plainly, with a reason	1	“I can’t cancel the pending payment myself. The bank releases it within five working days.”
Confirmed the next step with a time	1	“You’ll have the email by 15:00 today, from the membership desk. The reference is 4471.”
Customer level	–	Start 2, highest 3, end 1. Up to 3 after “It’s only pending, nothing to worry about.” Down after the acknowledgement, and down again after the offer of a written confirmation.
Hidden need came out	Yes	After the question “When does your rent go out?” The customer then said they needed proof for the bank, not a refund.
Next step with a time	Yes	The rep emails a confirmation with reference 4471 by 15:00 today. The customer forwards it to the bank. The customer calls back with the reference if the payment is still there after five working days.
Words that raised the level	–	“It’s only pending, nothing to worry about.” It came before any acknowledgement.
One thing to keep, one to try	–	Keep: “When does your rent go out?” It found the real need. Try: start with the acknowledgement, and give the facts after it.

Facilitator run of show

1 Open, and set the limits | 7 minutes

Two minutes: explain the purpose. Say: “We will handle eight invented customer contacts. Each customer has a hidden brief, and the rep has the rules of the organisation. The contact settles when the rep finds out what the customer needs.” Three minutes: show the table “When to end the contact or hand it over” and let people read it. Say: “If a customer is abusive or threatening, the skill is to end the contact or get help, as your policy says. We do not practise putting up with it, and nobody here plays that customer.” If you train an internal team, add one line on your own policy. Two minutes: agree the rules. The scenarios are fictional. Customer players stay at level 3 or below, with no insults, swearing or threats. Anyone can say “pause” or pass. Observers count words, not people.

2 Show the sequence and the customer levels | 10 minutes

Three minutes: walk through the five steps: let them finish, acknowledge, check, offer, confirm. Two minutes: show the customer levels. Say: “As the customer, start at the level on your card. Go down one level when you hear something on your ‘calms’ list, and up one when you hear something on your ‘raises’ list, never above 3.” Four minutes: demonstrate with a card you will not use in the rounds, such as card 6, with a volunteer as the guest. Open badly on purpose: “Check-in is from 15:00, it can be later. Take a seat in the lounge.” Stop after 30 seconds and ask which words raised the level. Open again: “You’ve had a long trip and your room isn’t ready. What do you need in the next hour?” One minute: explain how chat and email cards run: messages on the reply sheet or in a private chat, and an email reply written in four minutes.

3 Round 1 | 14 minutes

Form trios: rep, customer and observer. Three minutes: the rep reads the rep card, the customer reads the customer card and notes the start level, and the observer reads both cards and the observer sheet. Six minutes: the contact. On a phone card, the rep and the customer turn their chairs or look at their cards, not at each other. On a chat card, they write short messages on the reply sheet and pass it, or type in a private chat. On an email card, the rep writes the reply in four minutes; the customer reads it in two, marks the line that changed their level and writes a one-line answer. Five minutes: the observer reads out the tally and exact words (two minutes), the customer gives their start, highest and end level and what moved it (one minute), the rep says what they would keep or change (one minute), and the trio writes one useful phrase down (one minute).

4 Round 2 | 14 minutes

Rotate the roles: the rep becomes the observer, the customer becomes the rep and the observer becomes the customer. Use the second card and the same timing. Say: “This time, do not offer anything until you have checked what the customer needs most.” In a group of four, one observer keeps the tally and the other notes the customer’s level and the exact words that raised or lowered it.

5 Round 3 | 14 minutes

Rotate again so that each person in a trio has held each role once. Use the third card and the same timing. Say: “End with the next step: who does what, by when, and how the customer will hear.” Walk between the groups and listen for times and names. If a level 3 card is in this round, remind customer players of the rule: firm and upset, never abusive.

6 Group debrief | 9 minutes

Six minutes: bring the trios together and ask for words, not people. “Which words brought the customer’s level down?” “Which words pushed it up?” “Which question found the hidden need?” Collect the phrases on a shared list or in the chat. Three minutes: ask, “In your own job, when would you end a contact or hand it over, and who is the next person?” Connect the answers to the table from the opening, and point people to their own policy rather than the kit’s wording.

7 Write your phrase bank and close | 7 minutes

Four minutes of private writing on the phrase bank. Each person writes their own words for each of the five steps and one sentence for handing a contact over, in the language of their own workplace. Three minutes: each person reads out one phrase they will use this week, writes it in the chat, or passes.

Reference tables

What the observer counts

The observer makes one mark each time the rep does one of these. The count guides the notes. It is not a score of the person.

Behaviour	What counts	Example words
Acknowledged the problem and its effect	A sentence that names what went wrong and what it meant for the customer, before any explanation.	“Two payments a few days before your rent. I can see why you’re worried.”
Asked a question about facts or needs	A question that starts with what, when, how or which, and that the rep did not answer for the customer.	“What do you need from us to sort it with your bank?”
Summarised what the customer said	The customer’s point in the rep’s words, with a check.	“So the main thing is proof in writing before Friday. Is that right?”
Offered a specific option	Something the rep can do, within the brief, with a time.	“I can email you a confirmation within the hour.”
Said a limit plainly, with a reason	What the rep cannot do, said once, with the reason, and without blaming a colleague.	“I can’t cancel a pending payment myself. The bank releases it.”
Confirmed the next step with a time	Who does what, by when, and how the customer will hear.	“You’ll have the email by 15:00 today. The reference is 4471.”

Choose three cards for your group

Start with a level 1 or 2 card and keep level 3 cards for round 2 or 3. Keep a fourth card for the demonstration; card 6 works well.

If your group works…	Use cards	Why
A first session, or a mixed group	3, 5 and 1	Chat, counter and phone. Levels 1, 2 and 2, so the group warms up before a harder card.
A contact centre (phone and chat)	3, 4 and 2	Two chat cards, then the level 3 phone card in round 3.
A front desk, shop or reception team	6, 5 and 2	Two counter cards, then the level 3 phone card in round 3.
A written support team (chat and email)	3, 8 and 7	Chat, then two email cards. The level 3 email comes last.
A group that wants to practise handing over	4, 8 and 2	Each card has a limit the rep cannot cross and a route to someone else.

Debrief and next steps

Questions for reflection

- Which exact words brought the customer’s level down, and which pushed it up?
- Which question found the hidden need, and what had the rep assumed before they heard it?

- How did the rep say what they could not do, and how did it land with the customer?
- In your own job, when would you end a contact or hand it over, and who is the next person?

Adapt the session

- For 3 to 5 people, run one trio, a trio and a pair, or a group of four with two observers. A pair works without an observer: after the contact, the customer fills in the observer sheet and they compare notes.
- For a 45-minute version, keep the opening (7 minutes) and the sequence with the demonstration (10), run two rounds (28) and skip the group debrief, asking each trio to note one phrase in the last minute of round 2. Do not shorten the opening. With two rounds, each person holds two of the three roles.
- Online, use breakout rooms of three and send each brief by private chat before the rooms open. Phone cards run with cameras off. Chat cards run in the private chat. Email cards run in a shared document. Paste the round timing in each room.
- For people who prefer not to speak in a role-play, offer the observer role in every round, or an email card in their turn as rep. Passing is always allowed and needs no reason. Send the cards as plain text a day early to anyone who asks, and let screen-reader users take the email cards in a document.
- To write cards for your own organisation, keep them fictional and give the customer one need the rep does not know. Give the rep one real limit and one thing they can offer. Start at level 1 or 2, and keep level 3 to firm and upset. Do not base a card on a real customer or a real complaint, and do not write an abusive customer.

After the session

Send the five steps and the table “When to end the contact or hand it over” to the group within one working day, with your organisation’s policy on ending a contact. Ask each person to use one phrase from their phrase bank in a real contact within a week, and to note afterwards which step they used and what happened next. At a team meeting two weeks later, spend ten minutes on the phrases that worked, without customer names or details. If someone describes a contact where they felt unsafe, do not coach it as a skills problem; make sure it was reported and that they know the route.

Questions people ask

What are good customer service role play scenarios for training?

Ordinary contacts where the customer has a need that the rep can only find by listening and asking: a double payment before rent day, a missed repair visit, a jacket needed by Saturday, a locked account before a deadline, a cancelled class, a hotel room that is not ready, a refund that came back, and a price promised on the phone. This kit gives each one a rep brief with real limits and a hidden customer brief, two cards for each of phone, chat, counter and email.

What is the de-escalation sequence, and is it a recognised model?

Five plain steps written for this kit: let them finish, acknowledge, check, offer and confirm. It is not a branded, licensed or validated model, and it does not promise that every customer calms down. If your organisation already teaches a model, use its names for the steps and keep the cards and the observer tally.

Do any scenarios include abusive or threatening customers?

No. The highest level a customer player can use is firm and upset, with no insults, swearing, threats or personal remarks. The kit has a separate table on when to end a contact or hand it over: abuse, threats, someone at risk, a request above your authority, a formal complaint, a request for a manager, an unconfirmed identity and a rep who cannot continue. Follow your own organisation’s policy and local law; the table is not legal, HR or safety advice.

How is this different from the communication skills activities and the conflict resolution activities?

The communication role-play cards practise six everyday moves between colleagues, such as explaining a change or saying no. The conflict resolution activities are disagreements between two colleagues of equal standing. Here one person is a customer with a hidden need and a level that rises or falls with the rep's words, the rep has the organisation's limits, and the cards cover phone, chat, counter and email. The active listening exercises are a useful warm-up for steps 1 and 3.

How many people do I need, and can I run it online or with chat and email teams?

Six to eighteen people in trios: rep, customer and observer. When the number does not divide by three, make one or two groups of four with a second observer, or use a pair for 3 to 5 people. Online, use breakout rooms of three with the briefs sent by private chat. Chat cards run as short typed messages, and email cards as a reply written in four minutes, so written support teams practise their own channel.

What is included in the free and editable files?

The open PDF has the table of when to end or hand over, the de-escalation sequence, the customer levels, the rep and customer cards, the observer sheet, the chat and email reply sheet, the phrase bank, a filled example and the 75-minute facilitator plan. Subscribers also receive the editable Word file, an Excel workbook with the session plan, the cards, a card plan that checks channels and levels, an observer tally that adds up each round and the change in the customer's level, a trio planner and a phrase bank, and a CSV of the session plan.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.