



Counter Intelligence*

Sharpening Skills for Customer Service

Just came from a local bank where I withdrew some funds and clearly asked for a specific amount. When I went to sign the withdrawal slip, the amount was wrong so I kindly pointed the discrepancy out to the teller. It was then the teller said, “Oh, that was the amount you told me” and went on to give the reason why I must have made the mistake. I thought, “of course it’s my fault.”

Brian Reagan, the comedian, has a clip on YouTube called “Hotel Problems” which gives his hilarious response to the hotel clerk when it was implied the reservation they couldn’t find was Brian’s fault. It is a must-see for anyone who trains in customer service.

Counter Intelligence is exactly what is needed when working with clients, customers or patients either at the counter, over the phone or in the waiting room.

This skill set separates the boys from the men and the girls from the ladies. You have to be truly comfortable in your own skin to keep your game face on when working with the public, especially the crabby ones.



When we speak of Counter Intelligence a couple of basic facts should be known up front. First, the customer needs to have three expectations addressed immediately:

1. They want to feel heard
2. They hope to be understood
3. They want to be taken seriously

“The first step in the communication process should be that those engaging with clients should be listening to what their ‘customers’ believe they need... not the other

*Title credit: Tom Humphrey, Director of Community Development and City Planner, Central Point OR

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way around. Until we focus entirely on those we serve, we will continue to lose relevance, regardless of how well we communicate our ‘message.’” Michael Petrenko

The businesses that strive to achieve good first impressions continue to set the table for a positive experience all the way around.

All of us have been on the side of the counter when the worker has barely looked up, didn’t smile or just blandly directed us to do what we needed to do. We were left feeling this was simply a business deal as we took a number.

Secondly, when the experience is less than satisfactory for the customer, it has been proven that although the customer may not say anything at that moment, they could later tell 10-16 other family members and friends about the poor quality of the experience at that particular business.

An author and professional with years of service working with the public in local government stated, “Those of us who are engaged with the community are now finding themselves interacting with a smarter, more sophisticated, and sometimes hostile public.”

“People like this new emphasis in other companies on service and expect the same from local government. Unfortunately, for this reason some planning programs have lost their credibility.” Ray Quay

It’s true: other cutting-edge organizations have stepped up to the challenge of improving client/customer relationships. Without even trying they have given a bad name to other businesses or industries who are not keeping pace with the need for excellent Counter Intelligence.

I have an acquaintance in the insurance claims industry who deals with angry customers frequently regarding their accidents or dissatisfying payment from the insurance company for their injury claim. She shared by learning some specific techniques and scripts, she hasn’t had to raise her voice or react negatively in over a year.



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She also stated some great ideas in moving a frustrated client to a place of understanding:

Counter Intelligence with Frustrated Clients

1. Allow them an opportunity to talk with little to no interruption. Try not to interject and calmly listen.
2. Let them know up front that you are trying to help them and that you will find an answer for their concern. She went on to say “People don’t want to be out of control if you are trying to help them.”
3. Identify with their frustration and validate their concerns, especially if you have had a similar one. I was talking with an agent of a TV satellite company whose finance department kept over billing me. The associate was so kind and understanding and went on to explain that she had been in that exact situation and shared how it worked out.
4. Make sure you repeat back their concern or recap what was just stated.
5. If the customer is starting to get worked up or be unreasonably rude, put them on hold to clear your mind and hopefully give them time to calm down. Scripts such as “I don’t have to continue to engage in a disrespectful conversation or raise my tone” can be helpful to calm a tense situation.

A Few Benefits to Counter Intelligence

In addition to sharpening customer service skills just for professional courtesy’s sake, research proves that clients and customers keep coming back for services when they are satisfied with how they have been treated. “Profitability, market share, and other measures of success increase thanks to satisfied and loyal customers. Successful businesses have more resources to reinvest

in the organization, which leads to greater employee satisfaction and retention.” (Paul Bernthal, Ph.D, and James H.S. David, Development Dimensions International).

This, my friends, is a no-brainer. As a result of Counter Intelligence a rewarding cycle repeats itself:

- ▶ Profitability increases
- ▶ There are more resources to reinvest back into the company
- ▶ Higher employee satisfaction and retention is achieved
- ▶ Word-of-mouth sharing from loyal customers spreads
- ▶ Both workers and customers are generally happier
- ▶ A trust develops with the organization which can lead to longtime customer-business relationships.

In having a discussion with a group of city planners and building officials it was interesting to me that the upbeat participants, which seemed to have energy for their work and enjoyed their role, all said their workplace culture encouraged good customer service training frequently.

Counter Intelligence Tools

1. Greet the customer in a friendly way with a good attitude. This gets both of you off the launch pad to a good start instantly.
2. With their permission, use their first name throughout the discussion as it adds a personal touch which is usually appreciated.
3. If the interaction is in person, eye contact is essential. Friendliness can be detected instantly through the eyes.
4. Don’t show any facial expressions or heave deep sighs indicating they are an intrusion or an interruption in your day.

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5. Convey to them that immediate action will be taken to help resolve their issue.
6. Admit when a mistake has possibly been made and do not blame the other departments.
7. You are the professional, so don't get hooked in emotionally to their frustration. Instead, let them know they have identified a problem that you agree needs to be resolved.

In conclusion, the most basic rule in developing Counter Intelligence is to treat those on the other side of the counter the same way you would want to be treated if you were in their shoes.

Recently I had been given the run-around regarding a problem with our daughter's car that no one seemed to have an answer for, or if they did, it was the wrong one. I finally found a busy mechanic who took extra time with me to explore the different possibilities of what was going on with the car.

He spelled out the different scenarios and costs associated with them. He was patient and obviously knowledgeable. I found myself within a few minutes going from exasperation to confidence in what he was able to do. All of a sudden the cost wasn't as much of a concern with me. I knew I was dealing with a professional and had no problem leaving my exhausting situation in his hands.

He fixed the problem that other mechanics told me was unfixable. I'm not going anywhere else when I need an honest and good mechanic because of his expertise and skills with Counter Intelligence!

See Track #21 on the website for our newest training on Counter Intelligence.



Bill Gallagher has been counseling and working with professionals since 1980. His emphasis in the workplace is to help develop both relational skills and professional standards among administration and staff. He has worked in multiple organizational settings and of recent has spent most of his time addressing workplace issues in healthcare and city government.

Bill formed TeamWorks in 2001 to help organizations achieve their goals for establishing high morale and client satisfaction. TeamWorks currently specializes in offering one-on-one surveys and evaluations for management and staff to assess the current culture's needs and recommended trainings going forward.

In addition to conducting a variety of workshops and in-services on workplace issues, Bill mediates conflict among partnerships and staff relationships, speaks at conventions, facilitates management retreats, and offers personal consultation and counseling for staff.

Bill's strengths are in public speaking, mediation, and understanding the complexities of relational dynamics in the workplace. He lives in Medford, Oregon, with his wife Jenny, and enjoys spending time with their five children and five granddaughters.