



2.3 Escalation Procedure for Disrespectful Customers

Policy Purpose and Scope

The purpose of this policy is to streamline the procedure for handling disrespectful customers. This policy also ensures objective review prior to terminating a customer.

Roles and Responsibilities

The Client Support Specialist Team Leads will handle a disrespectful customer as outlined below, and, if necessary, refer the matter to the General Counsel.

Operational Procedures

1. A Clear Verbal and (follow-up) Written Warning is Given after a Customer is Abusive

When a customer is disrespectful to a team member, the team lead should get involved and talk to the customer directly. If after talking with the customer, the team leader feels the customer has crossed the line, he or she should:

- a. Give the customer a cooling-off period of at least 24 hours;
- b. Call the customer and advise them i) that he or she has violated our mutual respect policy and ii) that if the behavior continues the customer will be terminated; the call could be made by a fellow team leader or the same team leader who recently spoke with the customer (whatever seems best);
- c. Follow-up the call with a written warning (per the phone call).

The customer will only receive one warning. The call should be made with the utmost sensitivity, because the nature of the call is very threatening. However, if the customer cannot handle the warning call and is again abusive, the customer should be recommended for termination. In the case where a team leader is unable to get on the call where a team member is abused, the team leader can nonetheless give the warning call and email if he or she feels it is appropriate.

2. Team Leader Determines a Customer Should be Terminated

After a customer has been warned and continues to be abusive, the handling team leader (of the later abuse) should refer the matter to one of the other team leads.

3. Referral of the Matter to Another Team Leader

The other team lead will review the ticket(s) and call the customer. The team lead should hear the customer's point of view and explain that he or she has been recommended for termination. Explain to the customer that you are reviewing the matter to see if there have been any misunderstandings.

4. Referral of the Matter to the General Counsel

If the other team lead believes the customer should be terminated, he or she will refer the matter to legal for a final decision. Barring unusual circumstances, the General Counsel will terminate the customer.

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