

Hard Conversations

De-escalation plays for software support agents and the leads who train them

Free sample: 3 complete plays. From Draft First. Written by a customer success and support lead.

This sample has three complete plays from the book, each with its role-play card: one for an angry opener, one for when you don't have answers yet, and one for the instant manager demand. Every play in the full book follows the same layout: the move, a decision rule, words to say, the line not to say, the traps, a check before you send, and an agent prompt for written replies.

The examples use made-up companies and people. Nothing here is legal, HR or crisis advice. Where a situation touches those areas, the book tells you to follow your company's policy.

The full book also has the stuck map for choosing a play from the ticket record, a decision boundary worksheet with starting defaults, an escalation route card, a phrase swap sheet, four longer agent prompts and a role-play hour scorecard.

Let them finish, then play it back

Interrupting a long, angry story, even to help, can tell the customer it's happening again. Letting them finish costs a minute; proving you heard it buys you the rest of the call.

SITUATION	A customer opens a call or chat with anger and a long, tangled story. Several problems, some history, maybe some blame.
TRIGGER	The first message or the first minute of a call is mostly story and feeling, and you can't yet see one clear question.

The move

1. Don't interrupt. On a call, use small sounds ("mm", "okay") so they know you're there. In chat, don't reply mid-story; wait for a pause.
2. Write down their words for the key facts as they talk: what broke, when, what it cost them, what they've already tried.
3. Play it back in two or three sentences, using their words, and end with "Did I get that right?"
4. If they correct you, thank them and play back the corrected version. Only then start on the fix.

Decision rule. Use this whenever the opener is longer than one paragraph or one minute. If they open with a single clear question, skip the playback and answer it.

Say it like this

"Let me make sure I have the whole picture. Your payroll export failed on Friday, you had to run it by hand for 40 people, and when you wrote in Saturday nobody answered until today. Did I get that right?"

"Is there anything I missed before I start digging in?"

Don't say

"Okay, so what exactly is the problem?"
 "Let me stop you there."

Watch for

- Playing back in your words ("so there's a sync issue") instead of theirs. Their words prove you listened.
- Jumping to the fix the moment you recognize the problem. They aren't ready to hear it yet.

If it still goes badly: If they reject the playback twice, ask them to give you the single most important thing to fix first, and start there.

Agent draft prompt

Here is a long customer message: [paste]. Write a playback of 2 to 3 sentences in plain words that uses the customer's own phrases for what went wrong, when, and what it cost them. End with "Did I get that right?" Don't add explanations, apologies or promises. Draft only.

Check before you send: Could the customer confirm that every fact in your playback came from their own words?

Four lines when you don't know yet

Under pressure, people fill silence with guesses, and guesses become promises. Four lines they can forward, with a name against every unknown, give the customer something true to brief their team with.

SITUATION The customer wants certainty you don't have: cause, fix time, whether data is affected.

TRIGGER You're being pushed for an answer and the honest answer is "not yet".

The move

1. Say what you know, in plain facts.
2. Say what you don't know yet, and who is finding out (a team or a person). An unknown with no owner is the stuck ticket of next week.
3. Say what you're doing next, and who is doing it.
4. Say what you can't do, if they've asked for it (you can't give a fix date, you can't bypass engineering).
5. Finish with a real time for the next contact, one you control.

Decision rule. Use this whenever you're tempted to say "probably" or "should". If any of the four lines is empty, say so ("there's nothing I can't do here").

Say it like this

"Here's where we are. What I know: reports for your workspace stopped generating at 9:40 this morning, and other customers are affected too. What I don't know yet: the cause, or when it'll be fixed; the engineers on the reporting team are finding out. What I'm doing: I've linked your ticket to the incident and I'm watching it. What I can't do is give you a fix time I'd be making up. I'll update you by 1pm your time either way."

Don't say

"It's probably a quick fix."

"Should be sorted by end of day."

Watch for

- Filling "don't know" with a hopeful guess. That's the whole trap.
- Giving the next contact time and then missing it. Set a time you can keep, with a reminder.

If it still goes badly: If they insist on a fix time anyway, repeat the next update time once, and offer to flag their deadline to the incident owner.

Agent draft prompt

From these notes: [paste what I know], draft a customer update in four short parts: what we know, what we don't know yet (and who is finding out), what we're doing, and what we can't do. Then add the next update time: [time and time zone]. No guesses, no "probably" or "should". Draft only.

Check before you send: Is every unknown paired with who is finding out, and are "probably" and "should" gone?

"Get me your manager"

Treat an instant manager demand as a question of trust, not an insult. Blocking it makes it worse; one genuine offer, then a warm transfer, respects the customer and protects you.

SITUATION	The customer asks for a manager in the first minute, or after one exchange.
TRIGGER	"Get me your manager", "I want to speak to someone senior", "put me through to your boss".

The move

1. Don't take it personally, and don't refuse.
2. Make one ownership offer: name something concrete you can do right now.
3. If they still want a manager, say yes. Tell them what happens next and how long it'll take, honestly.
4. Brief the manager (or lead, or escalation queue) with a summary so the customer doesn't repeat themselves.
5. Tell the customer you've briefed them.

Decision rule. One offer, then yes. Never make the customer ask three times. If no manager is available, say when one will be and how they'll reach the customer.

Say it like this

"I can get my lead. Before I do, I can see the failed payment on your account right now and retry it while we're talking. Would you like me to try that first, or would you rather go straight to my lead?"

"Of course. I'll brief her on everything so you don't have to repeat it. She's on another call; she'll call you back within the hour. [CONFIRM the real wait.]"

Don't say

"There's no manager available."

"My manager will tell you the same thing."

Watch for

- Making them wait on hold as a punishment for asking.
- A cold transfer with no summary. That's how one bad call becomes two.

If it still goes badly: If no lead is free and they won't wait, book the callback anyway, give the time, and put it in the ticket.

Agent draft prompt

Summarize this conversation for my team lead in 5 lines: the customer, the problem, what I've tried, what the customer wants, and their mood in plain words. Then draft a one-line message telling the customer I've briefed my lead and when they'll hear back: [time]. Draft only.

Check before you send: Did you make at most one offer, then say yes with a real wait time and a briefing sent?

Practice them: the role-play cards

Each play in the book has a card like these. A lead plays the customer from the brief; the agent sees only the goal; feedback covers the one behavior the coach watches.

Card 1. Let them finish, then play it back

CUSTOMER BRIEF	You run finance ops at Coldwater Logistics. The payroll export failed Friday; you ran it by hand for 40 staff and stayed late. You wrote in Saturday and heard nothing until Monday. Tell the whole story in one go, with some repetition. If interrupted, start again from the top, louder.
AGENT GOAL	Get the full story, play it back accurately, and have the customer confirm it before you discuss any fix.
WHAT GOOD LOOKS LIKE	No interruptions. A playback that uses "ran it by hand", "40 people" and "nobody answered", ending with a check question.
COACH WATCHES	Did the agent use the customer's words in the playback, or their own?

Card 6. Four lines when you don't know yet

CUSTOMER BRIEF	You're ops director at Saltmarsh Freight. Reports stopped generating this morning; your board meeting is at 4pm. Push hard: "Just tell me if it'll be fixed by 3." If the agent guesses, say "So you're promising 3pm?"
AGENT GOAL	Give the four parts honestly and a next update time, without guessing a fix time.
WHAT GOOD LOOKS LIKE	All four lines, with an owner for each unknown; next update at a set time; offers help with a workaround for the board meeting if one exists.
COACH WATCHES	Did the agent guess at a fix time, even softly?

Card 14. "Get me your manager"

CUSTOMER BRIEF	You're a practice manager at Elmstead Vets. A payment failed and your account is locked. Your first words: "I want your manager. Now." If the agent makes one good offer, you may accept it. If they argue or stall, insist harder.
AGENT GOAL	Make one concrete ownership offer, then transfer warmly with a summary if they still want it.
WHAT GOOD LOOKS LIKE	One specific offer; immediate yes if declined; an honest wait time; a briefing so the customer doesn't repeat themselves.
COACH WATCHES	Did the agent say yes after at most one offer?

Want the rest?

The full Hard Conversations playbook has all 24 plays, 24 role-play cards, the stuck map, the decision boundary worksheet with starting defaults, worked judgement calls, a measure-it sheet, the escalation route card, the phrase swap sheet and the agent prompts. It's a PDF you can print or keep open next to your queue. All sales are final, so this sample is here to help you decide.

Questions: hello@draftfirstcs.com

The full playbook has 24 plays

Chapter 1. Anger	1. Let them finish, then play it back; 2. Skip "I understand"; 3. All caps in chat; 4. They're right; 5. They're wrong, and angry
Chapter 2. Uncertainty and waiting	6. Four lines when you don't know yet; 7. "When will it be fixed?"; 8. Third contact on the same problem; 9. Waiting on another team
Chapter 3. Saying no	10. No to a policy exception; 11. The feature you'll never build; 12. No to a discount demand; 13. Out of scope
Chapter 4. Pressure and boundaries	14. "Get me your manager"; 15. "I'll post about this"; 16. Abusive language; 17. Legal threat; 18. The VIP who skips the queue
Chapter 5. Tricky situations	19. Customer in distress; 20. Two people at one customer disagree; 21. The customer who wants it in writing; 22. Language barrier
Chapter 6. For leads: make it stick	23. Write the decision boundaries; 24. The role-play hour