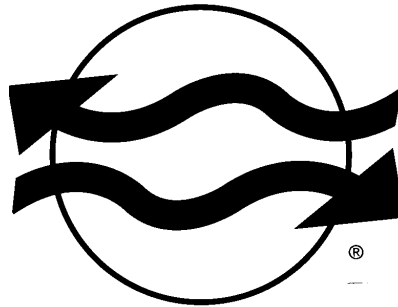


**HELP DESK
CALL HANDLING SCRIPTS**



FUTURE TECHNOLOGIES, INC.
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Call Handling

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Call Handling

Introduction

The help desk is the “heart” of any business. It exists to bring current and future information changes to customers. This information may be as basic as offering printing instructions or as complex as diagnosing and solving a system problem with the customer on the telephone.

Because the help desk team will probably talk with every company employee at one time or another, they are well positioned to take the pulse and temperature of the business on a daily basis. They are the first ones to notice a change or shift in company composure. Thus, the help desk team provides the foundation that keeps the business running smoothly.

However, a common frustration that customers share with us is the lack of consistency they encounter when calling the help desk--“My biggest concern in calling the help desk is that I never know who will answer the call or what type of response I will receive.” Although we may not have control over which analyst answers the telephone, we can take the necessary steps to ensure that the response provided is polite and accurate. Consistent responses and *follow up* establish credibility. Call handling scripts can be used to standardize your operation.

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Personal Greeting Scripts

Customers develop confidence when they know what to expect. Even a standard personal greeting will help to achieve this. Here is an example of what a personal greeting might include:

“Hello, this is Valerie of ABC Corporation. I am in the office, but with another customer at the moment. Please tell me how I can assist you. Leave a message after the tone, including your phone number and the best time to call. If there is research I can do before returning your call, please include details in your message. I will return your call just as soon as possible.”

If you want to give callers an alternative, your greeting might end with an instruction such as this:

“If you would like to speak to someone immediately, dial extension 1234 and a help desk analyst will assist you.”

If you have an after hours number where you can be *dependably* reached, your message should provide this information:

“Hello, this is Valerie of ABC Corporation. Our normal business hours are from 7:30 am to 4:30 pm. If this is an emergency, please page me at _____ or call me at _____.

Otherwise leave a message after the tone, including your phone number and the best time to call. I will return your call just as soon as possible.”

It is not necessary to update your personal greeting every day. However, if you will be out of the office for more than a day, you may want to change your greeting. A message explaining when you will return, and who to contact is probably sufficient:

“Hello, this is Valerie of ABC Corporation. It is Monday, February 1st, and I am on business travel through Wednesday, February 3rd. If your call is urgent and requires an immediate response, please contact the help desk at extension 1234. Otherwise, I will be checking voice mail, so please leave a message, including your phone number and the best time to call. I will return your call just as soon as possible.”

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Help Desk Greeting Scripts

Customer service at the help desk begins with a consistent greeting.

If an analyst picks up the call right away, an example of a standard help desk greeting might be:

“Thank you for calling the ABC help desk. This is Valerie, how can I help you?”

If the analyst is not available, an automated greeting might be:

“Thank you for calling the ABC help desk. If your request is urgent, please stay on the line to talk to an analyst. Your request is important to us and we want to assist you.

If you are not able to hold, you may press ___ at this time to leave a detailed voice message and a help desk analyst will contact you. Voice messages are checked every ___ minutes.

*You may also send an email message to **Error! Bookmark not defined.** Email messages are checked every ___ minutes. Please provide us with as much information as needed to assist you efficiently.*

Thank you again for calling the ABC help desk.”

It's important to say *thank you* for calling. Customers must feel comfortable with calling the help desk for assistance. If your customers do not call the help desk, that means they are going elsewhere for assistance.

Sometimes it may be necessary to alter the greeting, such as when you are providing a status update due to system outages, special events, etc. Special scripts are usually created for these situations.

For example, in the event that a file server is down, callers might initially hear this automated status message:

“We are currently experiencing problems with server1, which affects _____ (give a list of location(s) affected.) The estimated downtime is currently unknown...(or the estimated time for resolution is approximately ___ minutes). If you need further assistance, please stay on the line.”

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As a general rule, it is best to:

- Avoid phrases like “not able to answer”, or “I am not available”.
- Keep messages brief, less than 15 seconds.
- Maintain a professional profile. Humor has its place, but not in your voice message.

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Telephone Techniques

The help desk is the first point of contact for most customers. Good telephone techniques are critical. The following guidelines are recommended for enhancing customer relationships.

- *Smile*. It can alter your voice.
- Sit up and take a *deep breath*. It is relaxing and will take the tension out of your voice.
- Be *conscious* of all background noise.
- Respond as *quickly* as possible, without interrupting the customer.
- *Speak clearly*.
- Be *courteous*. Treat callers as you would like to be treated.
- *Listen carefully*. It is the best way to clearly understand a customer's needs.
- *Evaluate* the urgency of the customer's issue by asking questions. Find out the implications.
- *Do not* draw a conclusion until all of the information has been presented.
- If you believe that additional time is needed to research the issue, discuss *options* with the customer.
- Once the issue is resolved, be *certain* that the customer is *satisfied* with the resolution.
- *Fully document* all of the details in the database.
- *Do not* place a customer on hold unless it is absolutely necessary. If you need to place a customer on hold, then explain how long you expect to be away from the telephone. Obtain permission for putting them on hold. Always check back with the caller if you are longer than expected. Ask if they would prefer you to call them back by a certain time. Always thank the caller for holding.

A customer should not have to call the help desk to find out the status of an open service ticket. Status updates should be provided when service times exceed the service level agreement.

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Call Ownership

Once an analyst picks up the telephone, they generally own the call and it is their responsibility until:

- The caller's request for information is fulfilled.
- The issue or problem is resolved.
- The ticket is routed or escalated to another support team.

The front-line help desk analysts should document 100% of all customer requests in a database.

The front-line help desk analysts are usually responsible for the service ticket throughout the ticket's life cycle. If for some reason the request is not resolved quickly and additional research is necessary to complete the service, it is the responsibility of the front-line staff to provide the customer with periodic updates. If the problem is of a *critical nature*, follow up should be required. For example:

"We are still analyzing the situation, and have not yet identified a solution to the problem. At this time we are unable to provide an estimated time for repair. I know you don't want to hear this, and I am sorry this happened. We will fix the problem as quickly as possible."

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Call Response Steps

Always keep service levels in mind when assisting customers.

Sequence of Tasks	Action	Details
Caller identification	Obtain profile information	Customer name, department, location, telephone number, configuration, etc. Check customer history records for associated tickets
Qualify the call	Determine the type of service being requested	Verify supported customer, hardware, software, etc.
Issue identification	Open service ticket	Document the request clearly when opening the service ticket in the database
Call resolution	Provide information, answer questions, solve the issue, etc.	Update the request with complete details and close the service ticket in the database
Routing or escalation	Assign to the appropriate individual or support team	Update the request with complete details and forward to the appropriate individual or support team

Caller Identification

Verify the customer's profile information. (Note: Certain communication technologies will allow you to pre-populate your service management system with the customer's profile information.)

"May I have the spelling of your last name please? Is your first name _____?"

If yes, proceed with verifying information such as *location* and *telephone number*.

If the contact name or customer name *is not* found in the database, include:

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“May I have the spelling of your first name? I would like to ask you a few basic questions, so that we can help you more efficiently the next time you call the ABC help desk.”

Add this customer information to the database, then proceed.

Qualify the Call

When you know what to do:

“Yes, XYZ is a standard, supported product, and we will install the software for you. I can easily create a service ticket to have the software installed. The response time for new software installations is within _____. Is this an acceptable time frame for you?”

If not, determine an appropriate time frame. Your script will vary, depending on your methods for software installations. However, if the service requires a field support technician to visit the customer’s site, you may want to schedule the visit.

“Would you like to schedule an installation date and time that accommodates your schedule?”

When you don’t know what to do:

It’s OK not to know the answer. What is unacceptable is to mislead the customer into thinking that you know, or to *guess*.

If it’s necessary to perform some research or specific tasks to address the request, avoid dead air space. This can lead to customer anxiety or frustration. Let the customer know what steps you are taking to assist them, and use this time to build a positive relationship. Consider the following:

“I do not have an immediate answer to your request. XYZ is not on our standard, supported software list. What I’d like to do is consult with one of my colleagues. Let me first be absolutely certain that I understand your situation, so that I can provide accurate information to the team. I will call you as soon as I have an answer.”

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Issue Identification

The type and variety of requests your help desk receives will vary considerably. Through experience and a better understanding of your customer needs, the process of identification will become easier.

For critical situations, consider asking these questions:

- Is this a recurring problem for you? (If the answer is yes, review the *call history*.)
- Is one person affected or an entire department?
- If one person, how critical is the problem to your immediate activity?
- Is there a work-around (e.g., printing to another printer)?
- Are external customers involved?

If the request is straight-forward or a *how-to* question, consider this response:

“Let me search our knowledge base. I’m typing some information into the system. Now I’m waiting for an answer to come up on the screen. It should be just a few seconds...”

For recurring complaints that have involved failure to diagnose a problem correctly, do not make excuses or denigrate the product--address the problem. Focus on the objective, which is to get the customer up and running. Consider a response like:

“In reviewing your call history I can see that we have sent a technician to look at this problem several times. I am sorry the service call is taking more than one occurrence to resolve your problem. In most cases, we are equipped to handle diagnosis and repair on our first visit to your workstation. However this situation does require that I dispatch another technician to look at your computer. I am going to send a senior technician on our staff. This is our standard procedure for situations like this.”

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Call Resolution

In many companies, the front-line help desk analysts try to resolve as many issues as possible at the time of the initial call. If the telephone call begins to exceed 5-10 minutes and the issue is complex, or if the help desk analyst lacks the knowledge to resolve the issue, the call may be routed or escalated to another support team.

For straightforward requests, the response is simple:

“I can help you with that.”

“Thank you for calling the ABC help desk.”

Using polite closings (e.g., “Have a nice day”) will make customers feel relaxed and pleased with the help desk.

Call Routing or Escalation

If the request is redirected to another person or team, the responding support person should further document the situation and provide status updates to the front-line staff. If service tickets extend beyond the service level agreement response and resolution time, follow up with the customer should be considered. Communication is everything.

“Your request will be given to a technical specialist on the _____ team immediately, and _____ will get back to you within _____. If we do not have a complete answer, I will let you know what I have learned. When would be a good time for me to follow up with you?”

It is very important to *not* make the customer repeat information when they are being transferred to another team. Fully brief your colleagues and document the information in the database. Internal tracking and communication practices should be common knowledge.

Conclusion

Although future technologies will continue to shape call handling processes, there will always be a need for human intervention. Scripts and other telephone techniques in use today should not be designed to take away people's individuality, but to enhance their job performance.

Business is and always has been driven by customer desires. Consistent call handling procedures will develop a bond between the help desk and its customers--proven practicality.

For more information on call handling scripts, see Michael Ramundo's book, *Complete Book of Ready-to-Use Customer Service Scripts* in our book list on the FutureStorming page **Error! Bookmark not defined.** under Amazon.