**Task 12**

**HELP DESK**

**CALL HANDLING SCRIPTS**

**FUTURE TECHNOLOGIES, INC.**

<http://www.auditnet.org/docs/call_handling.pdf>

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**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.

**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.”*

**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 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.”

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.

**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.

**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.”*

**Call Response Steps**

Always keep service levels in mind when assisting customers.

**Sequence of Tasks**

1. Caller identification
2. Obtain profile information
3. Customer name,
4. department,
5. location,
6. telephone number,
7. configuration, etc.
8. Check customer history records for associated tickets
9. Qualify the call
10. Determine the type of service being requested
11. Verify supported customer, hardware, software, etc.
12. Issue identification
13. Open service ticket
14. Document the request clearly when opening the service ticket in the database
15. Call resolution
16. Provide information, answer questions, solve
17. the issue, etc.
18. Update the request with complete details and close the service ticket in the database
19. Routing or escalation
20. Assign to the appropriate individual or support team
21. Update the request with complete details and forward to the appropriate individual or support team
22. Caller Identification
23. 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:

Call Handling

“*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.”*

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.”*

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**

.... 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

**QUESTIONS**

**10 marks per question**

Additional Resources:

HELP DESK CALL HANDLING SCRIPTS

<http://www.google.com.au/search?hl=en&safe=active&q=HELP+DESK+CALL+HANDLING+SCRIPTS+&btnG=Search&aq=f&aqi=&aql=&oq=&gs_rfai>=

VoIP

<http://www.google.com.au/search?hl=en&safe=active&q=VoIP&aq=f&aqi=g10&aql=&oq=&gs_rfai>=

UNESCO Free Software Portal

<http://www.unesco-ci.org/cgi-bin/portals/foss/page.cgi?d=1&g=11>

1. Why use “Call handling scripts”?

To ensure that all calls are consistently answered the same way so that customers know what to expect when the help desk staff answers a call.

1. Give examples of two Call handling scripts to the HELPDESK at Lander Toyota
   * Problem – no wireless keyboard/mouse

**Operator:** “Hello, my name is Lyn, how may I help you?”

**Client:** “Hello, I cannot use my computer because my wireless mouse and keyboard are missing”

**Operator:** “Ok, I just need to ask you a few questions before we can proceed”

Operator asks basic questions such as name, department, computer number, telephone number etc

Operator checks the computer database for the client’s previous issues.

**Operator:** “Ok, can you tell me where your mouse and keyboard are?”

**Client:** “No, when I came to work this morning they were missing”

Operator checks the computer database for similar issues.

**Operator:** “Ok, I will requisition you new wireless keyboard and mouse, you need to speak to the head your department to get them for you. Have a good day”

**Client:** “Thank you; you have a good day too”

* + Problem – antivirus not current

**Operator:** “Hello, my name is Lyn, how may I help you?”

**Client:** “Hello, my virus scanner is not up to date”

**Operator:** “Ok, I just need to ask you a few questions before we can proceed”

Operator asks basic questions such as name, department, computer number, telephone number etc

Operator checks the computer database for the client’s previous issues.

**Operator:** “Ok, what version of the virus scanner do you currently have installed?”

**Client:** “It’s an older version that hasn’t been updated for 3 months”

Operator checks the computer database for similar issues.

**Operator:** “Ok, I will give you instructions on turning on your automatic updates on your virus scanner”

Operator gives the automatic update instructions

**Client:** “Thank you; you have a good day too”

**Operator:** “You too, thank you for calling”

1. Why document all calls for help?

All calls should be documented so that the operator doesn’t have to solve the same issue over and over again. If the same issue has been solved previously then all the operator has to do is look it up on the database. This saves time and money.

1. Give typical problems with the following:
   * Computer screen:
2. Cable unplugged
3. Power cord unplugged
4. Broken
5. Fingerprints on the screen
   * Trackball mouse:
6. Dirt in the ball
7. Not plugged in correctly
8. Driver not the right one or not up to date
9. Batteries low if it’s a wireless mouse
   * Keyboard:
10. Not plugged in correctly
11. Batteries low if it’s a wireless keyboard
12. Configured incorrectly; example – English configuration and not US
    * Workstation hard drive:
13. Low space
14. Cable has come lose or unplugged internally
15. Noise coming from hard drive signalling a head crash
16. Reboots constantly
17. Freezes regularly
18. Give the sequence of tasks for a HelpDesk call and short explanations of each task
19. Greeting – Operator greets client with a simple greeting to make the client feel comfortable.
20. Brief description of problem – Client explains briefly explains the issue to the operator.
21. Identification of client– Operator asks the client a series of questions to establish who they are and if they are entitled to use the help desk.
22. Identification of client’s previous issues – The operator then checks the database to identify what issues the client has had previously.
23. In depth description of problem – Operator then asks the client to give them more details of the issue.
24. You have been asked by the HelpDesk supervisor to put a unique and distinctive ringtone on all helpdesk mobile telephones:
    * Explain the steps in doing this:
      + Download and install the audio editing software Audacity.
      + Download a song that is in the public domain or songs that are royalty free.
      + Open the song in the editing software and choose a 20 to 30 second portion.
      + Loop it to play over and over again.
    * What format would you use:
      + Mp3
      + WAV
    * What are the coyright issues in doing this?
      + There are no copyright issues with this as all the songs are in the public domain and are no longer subject to copyright laws. The songs were either made before 1922 or their owners have given the rights to the public.
    * Create a sample ringtone and put it on your wikispace.
25. A client requires an explanation of VoIP.

Put your explanation in a short report suitable for general use by all departments of Lander Toyota.

* Voip is the acronym for voice over internet protocol.
* It is the protocol of making phone calls using broadband internet instead of using the telephone network.
* Voip can reduce the cost of calls because it is either free or relatively inexpensive. This is an especially important consideration for long distance and international phone calls.
* The statistics have shown that a minimum saving of 50% of calls plus the cost of line rental.

1. A department would like to use VoIP to reduce its call charges.

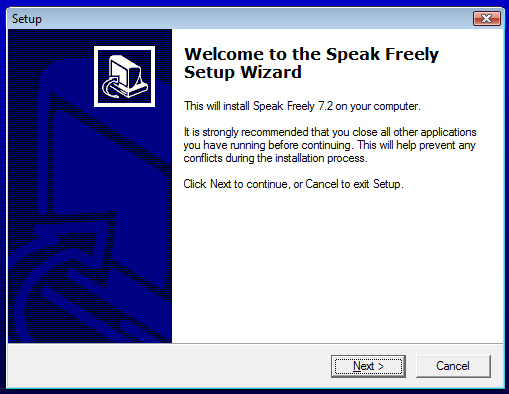
Explain the steps in doing this:

1. Choose a company for your VOIP such as Engin - <http://www.engin.com.au/>
2. Choose a appropriate plan.
3. Order and install required hardware and software.
4. A. Recommend VoIP software for use in a remote (outsourced) HelpDesk:
   * + Axon is a VOIP software designed to manage phone calls in business or call centre environment. It works the same as a fully functioned telephone switch - http://www.nch.com.au/pbx/index.html

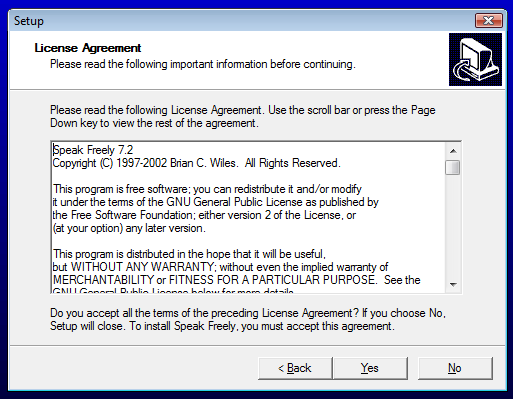
B. What are the likely savings and Quality of Service (QoS) issues:

1. The statistics have shown that a minimum saving of 50% of calls plus saving the cost of line rental.
2. QoS issues relating to VOIP can be the bandwidth; this can cause a problem with drop outs and loss of data being transferred (called packets) and delays in the delivery of packets.
3. Research the VOIP service provider to ensure they are providing adequate quality of service.
4. The QoS will also depend on the hardware used so use good quality current hardware such as routers and switches.
5. Another consideration of the QoS of VOIP is the infrastructure of the network once the packets leave your premises so for example if the cables are not maintained there could be a loss in quality
6. The final consideration is the backup method if the VOIP network connection goes down. This could be a mobile telephone or a minimal telephone line rental.
7. Create an instruction manual for installing VoIP that includes screen captures.
   * + Choose and download the software that suits your needs.
     + I have chosen Speak Freely for Windows

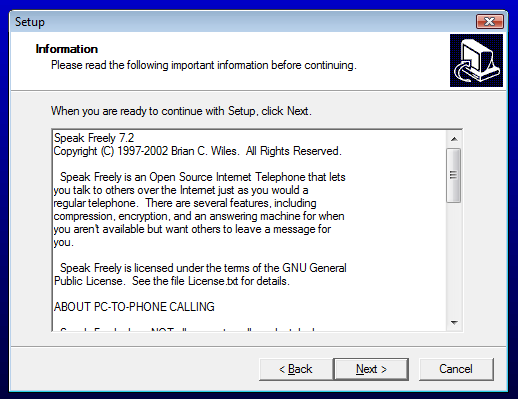
<http://www.speakfreely.org/>



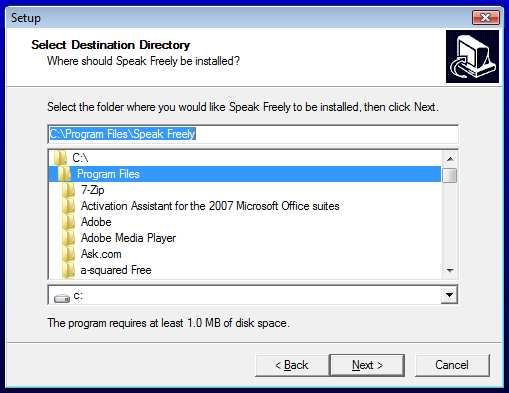
* + - Click next
    - Accept the license agreement.



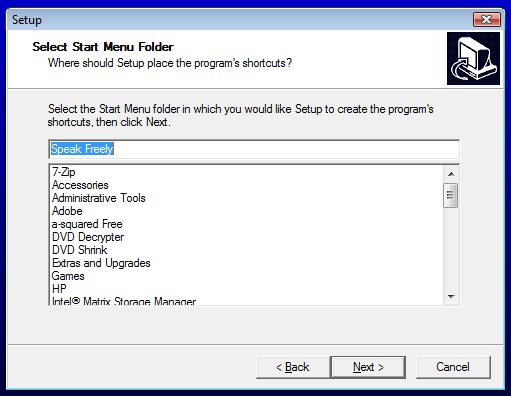
* + - Read the important information before continuing.



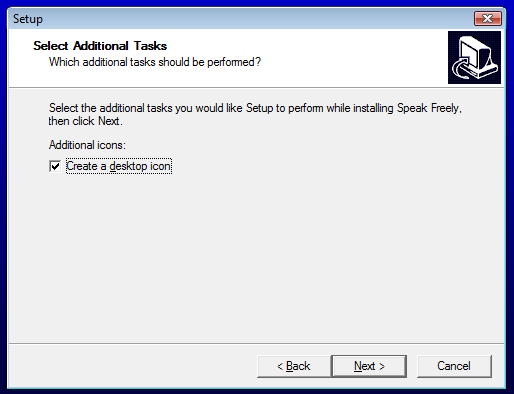
* + - Choose a destination folder.



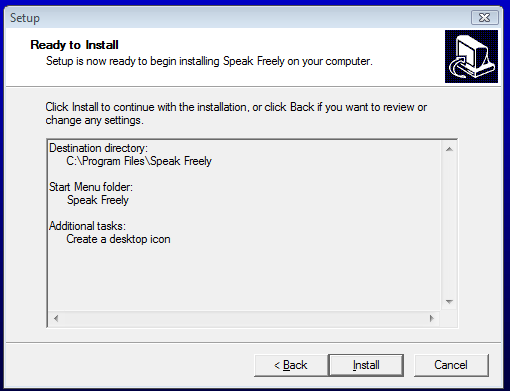
* + - Select start menu folder



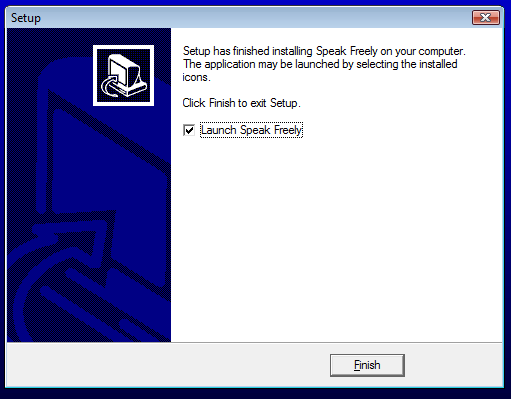
* + - Select additional tasks.



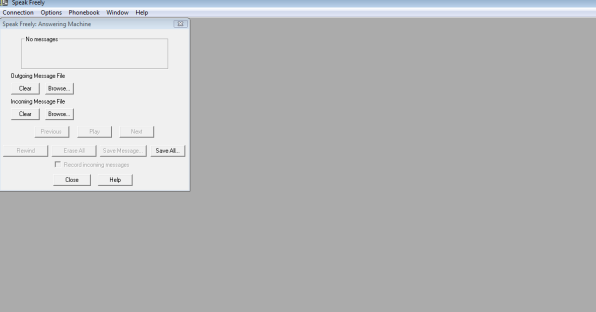
* + - Ready to install, click install.



* + - Setup, click finish.



* + - Now you can adjust the VOIP to your specifications.



References

Trackball mouse issues/keyboard issues: <http://www.smartcomputing.com/Editorial/article.asp?article=articles/WebOnly/TechSupport/433w10/33w01.asp&guid>=

VOIP: <http://voipstuff.net.au/>  
<http://www.nch.com.au/pbx/index.html>  
http://www.speakfreely.org/