**Task 3 HD CLIENTSUPPORT**

# Exercise - Use effective communication skills according to organisational standards

There’s a voice mail message at the Help Desk from the new team leader in Marketing.

She has rung early in the morning and is extremely upset as she hasn’t been able to access the files she needs to prepare for a meeting with a client.

Your task as the Help Desk Operator is to solve this client’s problem, either yourself or by referring it to someone else. You will need to use your communication skills and techniques when you respond to the call.

## Deliverables

Make a list of Do’s and Don’ts for responding to this call and handling this client who is extremely upset.

Before you begin, think about this situation, how you will handle the call and what action you would suggest. Concentrate on your communication skills rather than questioning techniques.

# Preview

Effective communication with your clients is critical to your organisation’s success. There are rules for every mode of communication you might use (phone, video conferencing, email, fax, memo or letter) when you answer requests and enquiries. Communication skills and the rules of business etiquette covered in this topic will help you to understand and service client needs in an IT role.

## Learning outcomes

After completing this topic you will be able to:

* Receive and answer requests and enquiries from clients in a polite, prompt and courteous manner.
* Use verbal and non-verbal communication to respond to the client’s requests and enquiries effectively.

# Reading

The readings here will help you develop your knowledge and skills for using effective communication skills according to organisational standards. This will involve and understanding of:

* How to receive requests and enquiries from clients in a polite and courteous manner
* Verbal and non-verbal communication
* Common documents
* Business etiquette.

# Receiving client requests and enquiries in a polite and courteous manner

Most jobs in the IT industry require you to interact regularly with clients in many ways, such as by:

* attending to customer enquiries, problems and complaints
* determining a client’s needs
* obtaining feedback from a client with regard to an installation, customisation, training or support issue
* providing a client with information or instruction.

Requests and enquiries come by email, phone, fax, letters and personal contact. In all cases you must establish and maintain a polite and courteous manner. To be polite and courteous means to show good manners and to respect the opinions and needs of others.

### Help the desk procedures

Most organisations have a procedural manual for the help desk that includes a section on dealing with client requests and enquiries. This will include treating other staff with respect and using a polite and courteous manner when responding to and recording client requests and enquiries.

# Verbal and non-verbal communication

The way you greet someone for the first time often determines the way that you will communicate with that person in future.

It is vital that we greet clients in a professional manner. Often clients contact you because they are experiencing difficulties with their computer system. They may have been trying to work out the problem themselves or they may fall into the ‘I don’t want to know about these things anyway’ category. In order for you to solve their IT problems, you need to be able to get them to tell you precisely what their problem is.

## Body language

Body language is one of the most important ways of expressing ideas. When you talk to someone face-to-face, about 80% of the message that you send is non-verbal — that is, without words. That means that 80% of the meaning of what you say is in the way that you project the message, and 20% of the message is the actual words that you use. Non-verbal communication is usually referred to as body language.

### How do we learn our body language?

We learn our body language from those around us. For example, in our society, it is a generally accepted rule or norm that it is rude to stare at someone or to point your finger at them.

Another example is: if you like someone, you try to stand closer to them. If they like you, they let you stand close. These are both gestures of body language.

### First impressions

It’s important when dealing with clients, that your body language is appropriate, particularly the first time you meet them.

First impressions are vital to other people’s acceptance of us. If they like ‘the look of us’, then there is a fair chance that they will like us.

## Spoken language

The language you use when communicating with clients is also very important, not just your clarity of expression (the way you speak, which is also physical) but the manner in which you speak.

Some companies, such as fast food companies and call centres, extensively train their employees in the use of standard greeting techniques. They develop scripts for their staff to use when taking requests and enquiries from clients. You have no doubt been on the receiving end of such techniques.

### Technical versus everyday language

People who work as IT professionals have a great deal of technical knowledge, which allows them to do their job well. However, the clients you work with probably won’t share that knowledge; they just want their computers and software to work!

This means that you should be careful about using technical words when talking to clients. Sometimes, if you’re talking to someone who understands the terms then a highly technical explanation is appropriate. However, technical words can often make clients defensive. This can make it harder to identify what’s gone wrong or for them to understand your solution.

# Common documents

Information is largely conveyed by documents. You need to know about the range of documents in workplaces and how to produce them.

## Memos

Memos (short for memorandums) are the means of conveying reminders or simple messages, and often the same message is sent to all staff.

Memos are of less formal in appearance than letters and should have information about only one topic (which also allows them to be filed accurately). The paper form of the memo is becoming rare as organisations increasingly use email for this purpose.

Memos are succinct. They generally have a header section with the date, names of the sender and receiver and the subject of the memo. Memo headings replace greetings — they identify who the writer is and what the memo is about. A memo doesn’t need to be signed by the author. You can see who has sent it from the heading.

#### Example

|  |  |
| --- | --- |
| **To:** Kim Jones |  |
| **CC:** Wendy Brown | ‘**CC**’ stands for Carbon Copy. It comes from when a carbon layer under the note would impress a copy on a duplicate form. In this case, the main person you are sending the memo to is Kim, but you are also sending Wendy a copy. |
| **From:** Robyn Perkins |  |
| **Date:** 5/8/01 |  |
| **Re:** Leave application | **Re** is short for ‘in regard to’ and means the same as ‘Subject’— what the memo is all about. |

The body of the memo then has the main idea, secondary ideas and action.

The main idea of a memo should be the first sentence or paragraph. It might identify a problem or issue, or provides information about organisational policies. Action is usually the final paragraph, with details of what to do about the problem/issue and who to contact.

## Faxes

It’s hard to imagine a business without a facsimile (fax) machine. Fax documents look somewhat like memos. However, while memos are never sent outside an organisation, faxes are.

A fax is structured in a similar way to memos, while the header should include the number of pages being sent.

### The body of the fax

The main idea is usually in the first sentence or paragraph and usually states the purpose. The secondary idea then provides more detail about the purpose, and the final paragraph is the ‘Action’, which details of what to do about the problem and who to contact.

## Letters

Letters are still the most formal way to express our ideas.

The layout for letters and the accepted standards for punctuation have changed a lot in the last 30 years. Electronic keyboards, word processors and spell checkers have changed the way we present our letters.

Each organisation will have its own standard layout for a letter and this will usually be kept as a template. Whenever you start work at a new place, find out what their standard letter layout is.

## Email

The most recent form of widely used electronic communication is email. Like a letter, it’s in writing (which is important!). Yet, it’s faster to send than a letter and it’s not as formal (it’s structured rather like a memo).

There is one disadvantage to email. You don’t control the format (the software program does this). However, you can personalise your email to some extent by adding features like your own signature at the end. Many organisations have a standard format for email signatures. These often include contact details for the person sending the email.

The structure for workplace emails is usually the same as for memos and faxes, with a main idea, a secondary idea and action to be taken.

Which email program have you used? You should have a program such as Eudora, Microsoft Outlook or Entourage. The screen below is the New Mail Message screen from Microsoft Outlook.

Make sure you know where to put:

* who the email is for
* who the email is from
* other people who need to receive the email
* the subject of the email (often your application will prompt you if you haven’t).

The ‘Cc’ line in an email works the same as for a memo, and the people who receive the email know who else has received a copy. The ‘Bcc’ line is for people who might receive a copy without a list of other recipients.

The body of the email, as with other short documents includes the main idea, secondary ideas, and any action required. Larger documents or files can be sent as attachments (note that organisational policies might restrict the type and size of attachments that can be sent).

# Business etiquette

Business etiquette refers to the unspoken rules that guide the way we communicate and behave. When we communicate on the telephone, by email or any other form of communication, we should follow standard etiquette.

## Telephone manners

When answering the telephone, you should speak clearly and:

1 Use a positive tone and say ‘Good morning’ or ‘Good afternoon’.

2 State the name of the organisation you are working for.

3 Introduce yourself.

4 Ask the person how you might help them.

## Email manners

Email also requires etiquette. You may find the email etiquette that your organisation expects you to follow is a part of the IT policy. Otherwise, there are general rules:

* Always include a short subject line.
* Use one subject per email.
* Monitor any confidential content.
* Check spelling (keeping an eye for word forms a computer spell checker might miss, such as ‘form’ for ‘from’).
* Keep formatting to a minimum including the use of backgrounds.

It is important to remember that when you communicate by email, the non-verbal communication is not coming through along with the written message. If you are concerned that anything may be misinterpreted, it is a good idea to explain it, or just keep it simple. It should also be noted that in many workplaces, email is a formal method of communication and can be kept as evidence of your actions as with any other forms of documentation.

# Summary

This reading has given you an outline of skills, etiquette and standards applied to basic modes and formats of communication in business and work settings. The workplace in which these modes or documents are used will often have organisation procedures and templates for you to follow.

# Research

## Business potential

At this website you can find some interesting articles and examples of verbal and non-verbal communication in the workplace: <http://www.businesspotential.com/>

## Non-verbal communication

Use the key words ‘nonverbal communication’ to search this website where Albert Mehrabian explains the results of his research into non-verbal communication: [www1.chapman.edu/](http://www1.chapman.edu/comm/comm/faculty/thobbs/com401/nonverb.html)

## Email etiquette

See the email etiquette guidelines for Griffith University at: [http://www.cit.gu.edu.au/](http://www.cit.gu.edu.au/%7Edavidt/email_etiquette.htm)

## Australian Business

Australian Business has a good article on telephone manners at: [http://www.australianbusiness.com.au/](http://www.australianbusiness.com.au/abl/bustips.nsf/0/9BCA713EBD028AAD4A256E7E000B47FA?OpenDocument)

# Terms

Business etiquette

unspoken rules that guide the way we communicate and behave in business and work settings

Email etiquette

general rules for the use of email within an organisation

Memo

short for memorandum; short notes and messages or reminders, often circulated to all staff

Non-verbal communication

communication without (or in addition to) using words, commonly referred to as body language

Script

prepared responses provided by some companies to help their staff communicate more effectively with clients, such as in greeting, taking requests, handling enquiries and answering the telephone

## Activity 1: Write a fax

Assume you have to send a fax to a hardware supplier to order some new printer cartridges for the colour and inkjet printers.

**What content items (in general) would you include in a fax order?**

|  |  |
| --- | --- |
| **Company Name:** Help Desk Support Inc. | |
| **To:** Acme Computer Hardware Company | **Phone:** 8970 0456 |
| **Date:** 4/8/2010 | **Fax:** 8970 0456 |
| **Re:** Printer cartridges | **Pages:** 1 |
| **Attention:** Maria | **Comment:** |

|  |
| --- |
| **Urgent ⬜ For Review ⬜ Please Comment ⬜ Please Reply ⬜ Please Recycle ⬜** |

To Maria;   
please order cartridges for the following printer:

**Name:** Canon   
**Type:** inkjet printer  
 **Model number:** 20044  
**Colour:** 10 of all colours  
**Black:** 20 black

Thank you  
Lyn

## Activity 2: Answer the telephone

Imagine you are working for an IT company that provides support services to large organisations. Write a script for answering the telephone that includes:

* a greeting
* standard information to give out
* a sample conversation
* closing.

**Write your script here.**

**Me:** Good morning. My name is Lyn. How may I help you?  
**Customer:** Good morning. I have an issue with my computer.  
**Me:** Ok, I need to start with some standard questions?   
What company are you with?   
What department?   
What is the identification number of your computer?  
What is your name?  
What is the issue that you are experiencing?  
**Customer:** answers questions.  
**Me:** Ok. I will forward this to a technician and they will prioritise your issue and contact you within 4 hours. Have a good day.  
**Customer:** Thank you. Have a good day.

## Check your understanding

### Communicating effectively

Give a brief explanation of each of the following three terms used in relation to effective communication skills:

**Body language**

It is non verbal communication used to communicate with or without using words to show interest in what the speaker is saying.

It is conveyed by the listener’s posture, eye contact, facial movements etc.

**Script**

A script is used to ensure that an operator is answering customer enquiries in a standard manner.

It will have a standard greeting; it may also include a set of questions to help a help desk technician understand the issue thoroughly. It will also include a standard way of closing the conversation.

There could also be more than one script used depending upon the scenario. One script could be used for a help desk enquiry; another could be used for a general customer issues.

**Business etiquette**

Business etiquette is a way that people behave in a business situation. It may be unwritten but should be obvious from the behaviour of others in the work place.

It governs the way that people speak, the way they act and the way the treat others. Also it governs what is the correct response in certain situations. It also relates to manners, sexism and racism etc.

**What is a courteous manner?**

|  |  |
| --- | --- |
|  | Being respectful |
|  | Friendliness |
|  | Assisting the client as much as possible |
|  | **All of the above** |

**Which approach is appropriate when you are speaking to a client?**

|  |  |
| --- | --- |
|  | Under no circumstances should I use technical jargon. |
|  | **I’ll use technical jargon if it is useful and the client can understand it.** |
|  | It doesn’t matter if I use technical jargon or not. |
|  | All of the above |

### Documents used in business communications

Top of Form

**What are the most common modes used to communicate with clients today?**

|  |  |
| --- | --- |
|  | Letters |
|  | Email |
|  | Fax |
|  | **All of the above** |

**Check the items that should be included in an email:**

Top of Form

**signature**

encryption

**who the email is for**

**information and/or required action**

emoticon

**who the email is from**

**a subject line**

Summary - Complete the following:

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit** | **Element** | **Question:** | **Answer:** |
| Provide one-to-one instruction | Determine client need | If the client is dissatisfied with the promptness of service from a Help Desk how would you review the situation? | Ask the supervisor to review the issue. If that doesn’t solve the problem then escalate it to the department manager. |
| Assist with policy development for client support procedures | Determine support issues | How could you gather feedback from Help Desk staff detailing problems with current methods? | Provide anonymous feedback forms. |
| Provide first-level remote help desk support | Determine the user support issue | Construct questions using, technical language that is understandable by the client, to gain an understanding of the slow Help Desk problem. | Did the help desk support staff answer your query in a timely fashion?  How long were you kept waiting before you were answered by a consultant?  Did they use language that you could understand? (To determine if that the reason that the call took so long to complete)  Were they courteous to you?  Did they convey the impression they were competent?  Did they seem like they knew what they were doing? |
| Communicate in the workplace | Establish contact with clients | How can you accommodate cultural differences with clients of the Help Desk? | Be sensitive to different clients needs. Provide interpreter services to clients whose technical understanding may be minimal. |
| Relate to clients on a business level | Understand organizational environment | Advise how you could provide a translation service at the Help Desk and any changes to the service-level agreements that may be required. | By employing people who speak more than two languages.  You would need to alter the SLA to ensure that the priority order and response time of interpreted calls was taken into consideration.  It would specify the type of interpreter services that are provided.  The hours of operation of the interpreters would also need to be included.  How the SLA is written concerning the interpreting services would depend upon if the interpreters were employed by the company or outsourced. |