



IT Help Desk Concierge Best Practices Workshop

Course ISI-1521 Three Days Hands-on, Instructor-led

Introduction

This three-day, instructor-led course will provide you with the knowledge to improve your service management and support capabilities. This course is appropriate for technical support professionals who provide in-person support to internal employees, remote workers or external customers and require skills specific to this form of customer contact

Student Materials

The student kit includes a comprehensive workbook and other necessary materials for this class.

Course Objectives

- Techniques for improving customer interaction
- Understanding and communicating with customers
- Strategies for managing difficult customers
- Time management and problem-solving skills
- Measurement, Prioritization, Documentation and Knowledge Sharing

Course Outline

Day 1: Providing Exceptional Concierge Service

- Initial Thoughts on Concierge Client Service
 - Definitions
 - Challenges
 - Importance
 - Your Role
 - Group discussions: Your best tips and tricks
- Managing Client Expectations
 - The “One IT” Concept
 - Moments of Truth
 - Future job aid: Client Expectation Worksheet
 - How, When and Why to Say “No”
 - Scenario usage: Practice saying no
 - Importance of Controlling the Discussion
 - DANCE Expectation Management Framework

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- “D” - Define the issue
 - “A” - Agree on what needs to be done
 - “N” - Negotiate the final outcome
 - “C” - Complete the task
 - “E” - Ensure the client is satisfied
 - Scenario usage: Practicing the DANCE
- Influencing Client Behavior
 - Emotional Response Inhibits Control (ERIC)
 - Action/Reaction Influencers
 - 15 Ways to Maximize Your Workplace Influence
 - Vent, Acknowledge, Solve, Educate (VASE)
 - Group discussions: Influence techniques you like best
- User Experience
 - Products
 - Services
 - Documentation and training
 - Multi-channel accessibility
 - IT thought leadership
 - And yes, You
 - Group brainstorm: What set of products, services, etc. would be best?
- Internal Client Service Concepts
 - Understanding Your Clients' Characteristics
 - Showing Service Ownership
 - Communicating with Your Client Leadership
 - Group discussions: What are your current client service challenges?
 - Group brainstorm: Solutions to your current client service challenges
- Managing Client Satisfaction
 - Dissatisfaction vs. Satisfaction vs. Delight
 - Client Wants
 - Promise, Action, Information, or Resolution (PAIR)
 - Future job aid: PAIR Checklist Worksheet
- Day 2 Idea Log Review

Day 2: Understanding and Communicating with Clients

- Group discussion: Your definition of Concierge Service
- Understanding the Client
 - Look Beyond Your Specific Role
 - Concept
 - Usage in Concierge Level Support
 - Widened Thinking in Motion
 - Knowledge Gathered
 - Insights Gained
 - Actionable Items
 - Group discussion: What can you learn through observation?

- Emotional Intelligence
 - Definition
 - Value in a Client Service Role
 - One-on-one conversation: One thing you know about yourself
 - One-on-one conversation: One thing you know about a user
- Merrill & Reid Social Styles
 - Driver
 - Expressive
 - Analytical
 - Amiable
 - Assessment: Your default social style
 - Concept usage: Working with other social styles
- Communicating with the Client
 - Question Usages/Purposes
 - Accuracy
 - Clarification
 - Completeness Check
 - Relevance
 - Conversation Control
 - Descriptive
 - Leading
 - Examples
 - Scenario usage: Uses purposeful questions during support calls
 - Active Listening
 - Assessment: Are you a good listener
 - Formal Topology
 - Ears, Eyes and Heart
 - Ears: Beyond the Words
 - Eyes: Body Language and Social Cues
 - Heart: Empathy and Understanding
 - One-on-one role plays: Listening using your ears, eyes and heart
 - Listening Styles
 - Action-Oriented
 - Comprehensive
 - Discriminative
 - Informational
 - Group Exercise: Name that Style
- Connecting with the Client
 - Visual, Auditory, and Kinesthetic
 - Visual
 - Auditory
 - Kinesthetic
 - Group Exercise: Name that Style
 - Problem Solving Listening Framework
 - Person

- Topic
- Delivery Type
- Setting
- Group discussions: Maximizing your conversational environment
- Day 2 Idea Log Review

Day 3: Measurement, Prioritization, Documentation and Knowledge Sharing

- Measurement
 - Group discussions: What measurements are currently in place?
 - Group discussions: How are these measurements used?
 - Future job aid: Measurement Worksheet
 - Group brainstorm: What measurements should be used?
 - Importance of Proper Measurement
 - Measurement Processes
 - Repeated Request vs. Silence
 - Surveys
 - Follow-Up Call Backs
 - Leadership Debrief
 - Walking the Halls
 - Net Promoter Score
 - Definition
 - Implications
 - Uber Model of Provider/User Evaluation
- Prioritization Techniques
 - Individual Techniques
 - TASK
 - Future job aid: TASK To-Do Worksheet
 - 18 Minutes
 - Eisenhower's Principle
 - Future job aid: Eisenhower's Principle Worksheet
 - Pareto Analysis (80/20 rule)
 - Negative Selection Reduction
 - Organizational Techniques
 - Predefined Priority Process
 - Weighted Prioritization
 - Group brainstorm: How can these techniques can used to your advantage?
- Documentation
 - Closing the Ticket
 - Group discussions: Best practices and information needed?
 - Describing the Technical Issue using IAR
 - I: Issue
 - A: Action

- R: Result
 - Scenario usage: IAR documentation examples
 - Future job aid: Issue Action Result (IAR) Worksheet
- Describing the Client
 - Importance of Respectful Evaluation
 - User Support Preferences
 - Group brainstorm: What information should be collected on each user?
- Client Type Classifications
 - Target User
 - Evangelist
 - Panic-Button Pusher
 - Rejectionist
 - Talker
 - Tech Savvy
 - Tinkerer
 - Group discussions: Best practices dealing with each classification type
- Expectations of Future Assistance Interactions
 - From User Perspective
 - From Tech Group's Perspective
 - Future job aid: Client Expectation Worksheet (revisited)
- Knowledge Sharing
 - Building a Best Practices Library
 - Importance
 - Value to Others
 - Value to You
 - Group brainstorm: What types of information should be included?
 - Group brainstorm: What tools should be used to collect and store information?
 - Group brainstorm: What incentives should exist to foster contributions?
- Day 3 Idea Log Review
- Your Next Steps