As you learned in Chapter 2, communications and interpersonal skills are very important for help desk and user support agents. Whether they supply help to end users face to face, via telephone, by fax, in e-mail messages, through a Web site, or in a chat session, all successful support staff must be able to listen, understand, communicate with, and work effectively with users to solve end-user problems.

Excellent communications and interpersonal skills are often more challenging for new user support workers to learn than technical skills or business skills. These skills are also more difficult to measure and evaluate. It takes practice to learn how to use communications skills effectively. But experienced user support agents and their managers know that client satisfaction is directly related to how well agents listen to, understand, and communicate with users. Support agents who concentrate solely on finding the correct technical answer may be frustrated and surprised to learn that clients are less than satisfied with their support interactions.

In this chapter, you’ll learn some practical listening, understanding, speaking, and client-relationship skills. User support staff can apply these skills to almost
any support situation to help solve user problems and achieve two goals of every support request: client satisfaction and excellent customer service. Although many of the skills discussed in this chapter apply directly to telephone support, these skills also apply to written communication. In fact, written communication is often trickier than oral communication because the tone and voice intonations are missing. The point is that strong communication and interpersonal skills are essential in any support environment.

COMMUNICATION AND CUSTOMER-SERVICE SKILLS

Communication skills are essential to provide high-quality customer service. Communication is a process that involves both listening and responding. Some communications, notably face to face, telephone, e-mail, and chat sessions, are two-way interactions between a support agent and an end user. Other communications, including a support Web site, are primarily one-way. To listen effectively, user support agents must be able to hear or read and understand a user’s problem or question, and then reflect their understanding of the problem or question by their spoken or written response. Listening, understanding, and responding are essential to solving user problems. A support organization that can solve user problems effectively and efficiently, and does so using good interpersonal skills, creates client satisfaction and demonstrates that the support organization provides excellent client services.

Help desks and user support organizations frequently incorporate a customer-service ethic into their mission statements. A customer-service ethic is an organization-wide philosophy—shared by everyone from top management to operational staff—that client relationships and client satisfaction are the most important aspect of a business. Many organizations aim for a target of 100% client satisfaction 100% of the time. This ethic means that the user support staff aims to satisfy every client in every support incident.

Chapter 7 discusses mission statements in detail.

How important are customer services to organizations? In an article in Harvard Business Review (HBR), Thomas O. Jones and W. Earl Sasser, Jr. discuss “Why Satisfied Customers Defect” (HBR, Nov–Dec, 1995). They describe a study of Xerox company customers in which totally satisfied customers were six times more likely to purchase other Xerox products than customers who were just “satisfied.” The authors conclude: “Merely satisfying customers who have the freedom to make choices is not enough to keep them loyal. The only truly loyal customers are totally satisfied customers.” Another author, Frederick Reichheld, writes in a March 1996 HBR article, “Learning from Customer Defections,” that “On average, the CEOs of U.S. corporations lose half of their customers every five years.”
Today, support organizations place a greater emphasis on customer-service excellence than they did in the past. Why? First, satisfied clients are likely to be repeat clients. A frequent reason that clients leave a hardware or software vendor for another is the poor service they receive. In fact, excellent service may be more important to clients than product features, price, convenience, or any other aspect of a business transaction. Second, it usually takes more support resources to handle incidents from dissatisfied clients than from satisfied ones. A dissatisfied client is more likely to generate:

- Lengthy incidents
- Repeated callbacks or help desk contacts
- Complaints and ill-will among clients (which can translate into poor public relations and lost sales)
- Incidents that need to be rerouted to a higher-level support agent or a user support manager
- Product returns for a refund

Because dissatisfied clients consume more support resources, any of these results reduce support staff productivity and may lead to a reputation for poor support service.

Jeff Davis shares tips on the importance of communications skills for support professionals in his article “Improve Your Communication Skills with these Techniques” at www.techrepublic.com/article.jhtml?id=r00320030107jed01.htm&src=bc.

What are the characteristics of a support organization that is devoted to a customer-service ethic? A customer-service ethic means that, in the pursuit of customer service excellence, support staff members:

- Provide clients with the information, service, or solutions they need, if there is any reasonable way to do so.
- Explain to clients what they can do for them if the clients’ problem cannot be resolved.
- Treat clients and potential clients with respect.
- Communicate to clients how long they are likely to be on hold, how long it will be before they receive a return call or e-mail, and provide time estimates of how long it may take to provide information or solve a problem.
- Return phone calls or e-mails when promised, even if just to report that no progress has yet been made.

Think of each user as a valued client. Always remember that user support is essentially a customer service business and that the goal is to create satisfied clients. If users are not treated as valued clients, they may not remain clients for long. If clients have a choice of vendors, where will they choose to shop? Usually, they will go where customer service is taken
seriously. Even in telephone support, users measure your attitude and react to the way you communicate and handle an incident. Support agents inevitably communicate by their voice or written responses whether they consider an incident interesting or boring and whether they value the user or view the incident as an intrusion on their time.

Treat each incident as an opportunity to build client satisfaction. To create client satisfaction and help attain an organization’s customer service goals, support agents must master the essential communications skills: listening, understanding, and responding.

**LISTEN CAREFULLY**

In any support conversation, learn to listen before you speak. Listen initially to a caller’s description of the question or problem to develop a thorough understanding of it. Interrupting a caller is one indication that you are not listening carefully. In any written communication, read all the text and try to understand the user’s problem before you jump to a response.

In Chapter 4, you’ll learn about a technique called active listening, which is a way to restate and clarify what you heard to reach a common understanding of a user’s problem.

During the problem description, carefully evaluate two other features of the user’s communication.

1. Listen to or observe the *language* the user uses to describe the problem. A user’s language frequently provides important clues as to whether the user is a novice or an experienced user. Support agents can target their language level slightly below the user’s to avoid language that is too complex or too technical for the user to understand.

2. Listen to *how* the user describes the problem, which can provide further insight into the problem and the user. What tone of voice does the user use? Does the user sound angry or frustrated? Does he hesitate or struggle with technical terms? Does she sound distracted or in a hurry? Subtle cues like these can provide valuable information about how to handle an incident.

Although detecting a user’s “tone of voice” is more difficult in written communications, support agents can look for statements that indicate frustration. For example, a user who writes, “This is my third chat session to try to resolve this problem,” is undoubtedly making more than a simple factual statement.

To build listening skills, look for courses in small group or interpersonal communications, which often place equal weight on listening and speaking skills. Many vocational-technical training programs and professional development seminars on customer service skills also include opportunities to work on listening and speaking skills. To develop skills with written communications from users, look for opportunities to study e-mail messages from friends or colleagues. Practice analyzing messages to examine the language used and to look for clues about how the sender feels. Ask yourself whether you can accurately restate their message.

**Build Understanding**

Once you have listened to and heard or read a user’s problem description, try to develop an understanding of the user’s situation. Ideally, you will develop some level of empathy with the user. **Empathy** is an understanding of and identification with another person’s situation, thoughts, and feelings. Support agents who can empathize with a user understand the problem or question from the user’s point of view. One measure of empathy is whether you can express a user’s problem in your own words. Another measure of empathy is whether a user agrees with your expression of the problem; in other words, have the two of you reached consensus? Empathy does not mean that you should take complete ownership of and responsibility for a problem, but that you understand and can relate effectively to the user, who does own the problem. Try to understand, for example, why the problem is important to a user, why a user might want to know a piece of information, or why a user is frustrated, upset, or angry. The following are examples of empathetic responses:

“Clearly, we need to get this system running again so you can create the report. Here’s where we’ll start . . .”

“It sounds like you’ve had a very frustrating morning, but I think I can help you with this . . .”

“To help you close your accounting month on time, I can give you a workaround for this problem. Then, when that’s finished, we can diagnose the problem you’re having, so it doesn’t happen again.”

To view an article on empathy and trust in customer relations, visit the Web site [www.businessballs.com/empathy.htm](http://www.businessballs.com/empathy.htm).

As you develop an understanding of the user and the problem, communicate to the user that you view him or her as a person, rather than as a support incident. One technique that experienced support agents use is to visualize the user. Even if you don’t know the user personally, think of someone in your own experience who sounds like or is similar to the user and then communicate with that image rather than with a voice at the other end of the phone line or a chat message on your monitor. A second technique is to use inclusive language, such as “we” rather than “I” and “you.” A telephone technique you can use
effectively is to smile while you are talking with a user. Even though a conversation is audial and not visual, many users can tell if you are smiling.

**RESPOND EFFECTIVELY**

In a support interaction, all aspects of your speech or writing communicate your understanding of a situation, lead to successful incident resolution, and influence the user’s level of satisfaction with the incident. Three important aspects are your greeting, how you use scripts, and your tone and style.

**Use a Sincere Greeting**

If every journey begins with a single step, all support communications begin with a **greeting**, which can affect the course of the entire interaction with the user. The greeting is the icebreaker. Users form their first impressions of the support staff person, the support service, and ultimately the entire organization that provides support based on the greeting. The greeting also sets the tone for the remainder of the incident. A sincere, positive greeting can be the first step toward calming a frustrated user and channeling an incident in a fruitful direction. Most support organizations train their staff members to use a standard greeting, which often includes the agent’s first name and the name of the organization or other identification. A common greeting is:

```
phone: “This is Joel in Computer Support. Thank you very much for your call. How can I help you?”
e-mail: “I’m Leticia at the Help Desk. Thanks very much for contacting us with the problem you encountered. Here is how I understand the problem . . .”
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Practice using a sincere greeting with a tone that communicates interest and enthusiasm and avoids sounding stiff, overly rehearsed, faked, or bored. A sound recorder or colleague can help provide feedback on your telephone greeting style. By the way, the immediate “thank you” in these examples communicates to the user that you appreciate and value the contact. Also, a sincere “thank you” contributes to a positive first impression, even if the user is upset or frustrated. If a user gives his or her name after your telephone greeting, write it down so you can use it during the incident. Many support organizations prefer the use of Mr. or Ms. and a user’s last name in preference to a first name, unless the user specifically invites first name use.

**Use Scripts Appropriately**

Many support organizations supply their agents with a script to help handle routine aspects of an incident. A **script** is a prepared sequence of questions and statements that covers the important parts of an incident. A script can include branches and decision points so that a
support agent follows a path through the script that matches a user’s answers. Scripts can be useful training aids for new support agents as well as tools to handle complex technical problems and difficult users. However, a user should never suspect that you are simply reading a script or any other information unless you make it clear beforehand that you are reading a piece of technical information to ensure accuracy. Furthermore, experienced support agents recognize situations in which they should deviate from the script, such as when the user demonstrates expert knowledge of the problem situation. Scripts are also useful if an incident evolves into an argument or other inappropriate communication. Reverting to a script can help you get an interaction back on track and make sure that the incident is handled according to organizational policy.

Some help desks maintain a database of frequently asked questions (FAQs) and prepared responses to them. When using prepared responses, use them like scripts. Don’t read lengthy responses, unless you make it clear that is what you are doing. Instead, restate the responses in your own words.

As part of a training program, a support agent may be asked to learn or develop model answers to questions. Experienced support staff and supervisors are useful sources of information about what constitutes a “good” response to an FAQ. For an example of an online FAQ database, see the Microsoft Office FAQ at www.microsoft.com/office/faq.htm.

Use Tone and Style Effectively

How you communicate with a user is often more important than the content of the communication. Your tone and style have a direct impact on a user’s satisfaction with a support incident. Which of these user statements best illustrates the desired outcome of a support incident?

“The support agent provided me with adequate information, but I felt through the whole conversation that I was intruding on his time. He spoke rapidly and curtly, and wasn’t very pleasant. I felt like he had ‘been there, done that’, and wasn’t interested in my problem.”

“The support agent couldn’t tell me what I needed to know, but explained why the information wasn’t available yet, when it would be, and invited me to call back. I felt like a valued client and that my call was important to her.”

Note that the first user received the information he sought, but was dissatisfied with the interaction; whereas the second user was fully satisfied even though her question was not answered.

Often, as part of help desk or user support training, support organizations describe in detail the type of communications style they want their agents to use—whether formal or informal, casual or professional, or somewhere in between. They realize that style is
important because it communicates the organization’s image. In reality, support staff members often modify the organization’s desired standard somewhat, depending on their experience, on user feedback, and on their own personalities.

Researcher Albert Mehrabian reports that the specific words people use to communicate account for only 7% of the information other people receive in a communication, as shown in Figure 3-1. Tone, voice inflection, voice pitch, and other aspects of language style account for about 38% of the information received. Nonverbal communication, sometimes called body language, actually accounts for more than half. In telephone, e-mail, and chat session communications, where nonverbal cues are missing, language style takes on even greater significance.

![Figure 3-1](image)

Figure 3-1 Relative importance of elements of communication

Use clear, succinct speech and match your speed to the user’s proficiency level. Many inexperienced support agents have a tendency to speak too fast, which is often a natural reaction to pressure to be productive and job stress. Practice speaking slowly, but not so slowly as to sound condescending. Remember, too, that shorter sentences are easier for a user to follow than long ones. Avoid a rising inflection at the end of sentences, which sounds like you are asking a question or are unsure.
Many of the suggestions about writing for end users in Chapter 12 also apply to verbal user support communications style, including the use of gender-neutral language and avoiding wordiness, long words, overly technical terms, acronyms, and jargon.

Avoid using empty phrases in support incidents. Inexperienced support agents, in particular, sometimes continue to talk just to fill the pauses. Avoid empty phrases, such as “Now let me see . . .,” “I think I’ve seen that problem before . . .,” or “I’m sure I must have that information somewhere here . . . .” These phrases do not convey useful information and do not instill confidence that the agent is on top of the problem, although it appears that communication is occurring. Instead of empty phrases, learn to be comfortable with pauses.

Phrase communications with end users positively, rather than negatively. For example, instead of saying or writing, “The problem with your file occurred because you didn’t follow the procedure described in Chapter 2 of the manual,” use a positive statement, such as “I think the procedure on file handling in Chapter 2 describes a way to avoid the problem you experienced with the file. Let me find the page for you . . . .”

Although technically correct solutions to user problems are critical, they will not by themselves guarantee satisfied clients. Successful support agents use greetings, scripts, and their tone and style to communicate their willingness to help, their regard for the client’s value, and their organization’s concern for the client’s satisfaction. They also use effective listening, reading, speaking, and writing skills as part of an incident management strategy.

An organization that offers Web-based training courses in call center (help desk) customer service and communications skills is SkillSoft. Learn about its courses at [www.skillssoft.com/corporate/curricula/bus_cs.htm](http://www.skillssoft.com/corporate/curricula/bus_cs.htm). Click the Front Line Call Center Skills (0110) link, for example, to see course topics, including Call Center Communication Skills (CUST 0112). Another organization that offers online courses in communications and listening skills aimed at customer support workers is LearnCustomerServiceOnline.com. View a list of available courses at [www.learncustomerserviceonline.com/CustServiceModules.htm](http://www.learncustomerserviceonline.com/CustServiceModules.htm).

The technical support office at Haywood Community College consists of three full-time employees (a network administrator and two network/computer support technicians). My responsibilities range from user support to managing the content and virus filter for the college network. My duties change from day to day and no two days are ever the same.

I have found that to be successful in my position, I have to be patient and have good communications skills. Listening is by far the most essential skill for this position. My job requires active listening and strong note-taking skills so that I have all the information I need to solve an employee’s problem. When a staff or faculty member calls me with a computer problem, I listen closely to the problem description. If possible, I have them walk through a procedure from the beginning to make sure that they are going through every step correctly. I also have them read any error messages they see. If I don’t know the solution to a particular problem, I refer the user to someone who does, or explain that I will need to call him or her back with a solution. I always strive to maintain the client’s confidence that I will solve the problem quickly or have another technician work with the user when it is outside my skill area.

Over the past few years, I have helped implement an online support request system at the college that enables our department to track requests by the users. I have found that this system helps to keep up with the requests of the hundreds of employees. The online request system is also beneficial because it requires our users to verbalize the problem, which helps them better understand what is happening. Writing about a problem is also an advantage of e-mail messages, which is another major communications channel in technical support. Although most of us are very comfortable with writing messages to our friends in the traditional, informal e-mail style, when you communicate with users via any medium, you should always keep the tone professional and courteous.

There are times when I have to handle difficult users. Older employees occasionally have negative attitudes about problems with computer technology but respond eagerly when they understand how easy it is to fix a problem. As a technical support employee, it is always important for me to remember that there was a time when I knew less than the people I am trying to help now. Remaining calm and logical will help the user better than matching their frustration with hostility. Let clients know you are there to help them and that you enjoy solving problems. If they feel you don’t have time or don’t want to bother with them, they will not ask for help again.
DEVELOP AN INCIDENT MANAGEMENT STRATEGY

Support agents who provide telephone, e-mail, or chat session support often have many incidents waiting in their queue. At the same time that they provide correct technical answers and excellent customer service, they must also handle incidents efficiently. An incident management strategy is a collection of tools, techniques, and strategies that successful support agents use to move through an incident effectively and efficiently, from the initial greeting to the end of the incident. The four goals of incident management are to:

1. Provide the user with the information he or she needs.
2. Manage stress levels for both the user and the support agent.
3. Ensure that the incident progresses from start to finish in an effective and efficient way.
4. Make the user more self-reliant.

All support agents develop and refine their own incident management strategy. However, you do not have to invent an incident management strategy from scratch. Resources you can build on and incorporate in your personal strategy include:

- Organizational policies on incident management philosophy and expectations
- Incident management strategies covered in support agent training programs
- Observation and imitation of respected senior support agents
- Your personal communications experience and style
- Feedback from users, peers, and supervisors on your incident management strengths and areas for improvement

An incident management strategy begins with knowledge of the support organization’s philosophy and policies, an understanding of the operation of automated help desk and user support tools such as the telephone and e-mail systems and help desk software package (described in Chapter 6), and guidelines that experienced support agents have found useful. Figure 3–2 lists some examples of incident management guidelines.

Ask Goal-Directed Diagnostic Questions. Each diagnostic question should be designed to move an incident toward a successful resolution. Diagnostic questions can be embedded in a script or they can be based on a support agent’s experience. Chapter 4 suggests several critical questions to ask in a troubleshooting situation.

Be Honest. It is better to be honest and forthcoming with users about product features, limitations, known bugs, and future product releases than to try to hide or cover up product problems and limitations. However, you must also abide by organizational policy on what information you are authorized to provide to users. For example, some vendors, as a matter of organizational policy, will not disclose future product features or availability dates. So you may encounter situations in which you have the information a user requests, but cannot
divulge it yet because your employer asks you not to. Many organizations also have a policy that discourages communicating negative comments about a competitor’s products, even though you may have an honest opinion about them.

**Say “I Don’t Know” When You Don’t.** It is often more productive to admit that you don’t know an answer than to waste both your time and the user’s time trying to suggest possibilities you aren’t sure of. A user rarely expects a support agent to know everything. However, never use a tone that conveys, “I don’t know, and therefore your question is stupid,” “I don’t know, and I don’t think anybody else does,” or “I don’t know, and I don’t care.” If you honestly don’t know an answer, refer the user to another person or information source where she or he can get the needed information. You can also promise to research the question and get back to the user with the needed information.

**Apologize.** An apology to a user who feels that they have been done an injustice is never a sign of weakness. One way to defuse a potentially difficult situation is to empathize with a user’s situation and offer a sincere apology for the perceived injustice, whether a user has spent a long time on hold, been the victim of a runaround (however unintentional), or purchased a product ill-suited for his or her needs.

**Say Thank You.** Thank the user for contacting the user support group at both the beginning and end of the support incident. “Thanks for contacting the Support Center” is a simple but effective way to communicate that the user and the contact are important. A “thank you” ends the incident on a positive note, even if the problem has been a difficult one.

**Use Incident Management, Not User Management.** Be sure to distinguish between incident management and user management: manage the incident, not the user. Do not attempt to manipulate users by judging how well they communicate their needs, how they organize their files, or how well they use their computers. The relationship between a
support agent and a user is not a boss-to-worker relationship, and should not be based on different levels of power. Although you can recommend that a user read a particular chapter in a manual or reorganize the files on his or her hard disk, you should not make it a condition for helping the user. Do not communicate that you are upset or be defensive if a user chooses not to take your advice. Users who feel that a support agent is trying to manage them or their work habits will rightfully feel resentful or manipulated and are more likely to be dissatisfied with a support incident.

**Teach Self-Reliance.** An immediate goal of each support incident is to provide information or to solve a user’s problem. A secondary, longer-term goal is to make each user more self-reliant. To create self-reliance, support agents explain solutions so that a user understands the reasons they encountered a problem and how to fix it. Agents also help create self-reliance when they refer to relevant printed or online documentation where users can locate additional information about problems or questions. User support has a built-in contradiction: the support staff would like every user to call back (because their jobs depend on support incidents), but the staff hopes to resolve each user’s problem so that he or she does not have to call back.

In reality, users will never become completely self-reliant. As computer use becomes even more widespread and systems become increasingly complex, both new and experienced users will continue to need an increased array of support services. Even power users and computer gurus occasionally need assistance. In addition, some users don’t want to become self-reliant; they feel that it is the support staff’s job to solve their problems. Recognize that you cannot force users to change their behavior. However, assume that a user is interested in understanding a problem and your solution to it until the user indicates clearly that they are not interested. Though complete user self-reliance may never be achieved, it is an important long-term goal for a support staff.

Successful incident management is rarely a skill or ability that comes easily to support agents. It takes practice to develop your own incident management strategy, and even then, some incidents still go awry. As you will see in the next section, even the best incident management approach can sometimes be derailed by the personalities or work styles of the participants.

**CUSTOMER SERVICE AND PERSONALITY TYPES**

A personality test commonly used in business and industry is the Myers–Briggs Type Indicator (MBTI). The test results determine where a test taker falls on four basic personality dimensions. The four dimensions of personality measured by the MBTI are:

- **Where do you direct your energy? Introversion (I) versus Extroversion (E)**
  This dimension measures whether you direct your energy to the external world of activity and words (Extroversion) or to the inner world of thoughts and emotions (Introversion). An Extrovert is more social and expressive, whereas an Introvert is more private and quiet.
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- **How do you process information? Sensing (S) versus Intuition (N)**
  Sensing (S) people work more with facts and experiences they obtain through their senses, whereas Intuitive (N) people tend to emphasize personal insight and the future. A Sensing person tends to prefer direct communication, while an Intuitive person seeks creative or novel ways to communicate with others.

- **How do you make decisions? Thinking (T) versus Feeling (F)**
  Thinking (T) people base decisions on logic, analysis, principles, and objective factors, whereas Feeling (F) people base decisions on personal values and subjective factors.

- **How do you organize your life? Judging (J) versus Perceiving (P)**
  Judging (J) people prefer a structured lifestyle in which they are well-organized and make structured decisions. Perceiving (P) people prefer to be open, flexible, and explore their options. Judging people like to be in control, whereas Perceiving people like spontaneity.

Each person is not a pure type of any of these, but falls on a continuum of the four dimensions. Furthermore, these basic personality types can be combined into any of 16 combinations. For example, one personality type is an ISTJ, while another is an ENFP. There is obviously no one, correct personality type. Most people are a mixture of these types.

One use of the Myers–Briggs personality types is to help people understand how users and coworkers—either as individuals or in workgroups—view the work world differently. This understanding can help work groups avoid conflicts and help support agents understand different approaches taken by end users.

For a thumbnail sketch of any of these types, visit www.knowyourtype.com and click one of the 16 types listed at the bottom of the page. To learn more about the MBTI personality test and the 16 personality types it measures, consult one of these resources:


Some communication difficulties that arise between a support agent and an end user may be traced to differences in basic personality type. For example, imagine the differences in communication style that may arise when a support agent, George, works on a problem with an end user, Hamida.
George, a support agent, is an ISTJ personality type on the MBTI scale. He is a very quiet, private person who prefers to work on problems independently by collecting data, and he often bases decisions on evidence he has carefully evaluated and analyzed. George prefers e-mail communications with users so that he has a written record of each incident.

Hamida, an internal end user, is an EHFP personality type. She is a warm, outgoing person who enjoys a collaborative, teamwork approach to problems. Hamida prefers to work on problems face to face so she can see a help desk agent’s facial expression and read his or her body language. She likes the challenge of problem solving by trial and error and is often willing to make guesses and take risks to try to find a solution.

George thinks Hamida is overly aggressive and disorganized. Her approach to problems seems illogical. He finds working on a problem using her hit-and-miss approach to be stressful and a waste of time. Hamida thinks George fits the stereotype of a typical computer nerd who can’t see over his pencil protector. She is frustrated that he seems unwilling to engage in give-and-take about a problem. She doesn’t understand why he isn’t willing to work on a problem together, but instead prefers short meetings and then quickly returns to his office to work.

As a support professional, George works hard to accommodate Hamida’s work style. He understands that personality type differences can help explain communication problems between himself and Hamida, but are not an excuse for a lack of cooperation or communications that aren’t civil.

Although George and Hamida are very different personality types based on the Myers-Briggs classification scheme, even small differences in basic personality can affect work and communication styles. Apart from differences in basic personality types, other barriers to effective communication between user support and end users occur because of difficult situations with which support agents must learn to deal.

### Strategies for Difficult Clients and Incidents

Although most users are rational and polite when they contact a support service, support agents may encounter several kinds of difficult users. A difficult client is one who requires special handling strategies because the user is angry, not communicative, rude, or exhibits a variety of other hard-to-handle attitudes or behaviors. The challenge for a support agent is to transform a difficult situation into a successful one. You will never be able to change a user’s personality. Instead, focus on the specific problem, on getting the user the needed
information, on providing excellent customer service in a respectful manner, and on moving to the next incident. To deal with difficult situations that might interfere with these goals, consider the strategies that experienced agents use.

**Users Who Complain**

Instead of simply describing a problem, some users want to complain about an organization’s products or services. Complaint handling and management is often an important function of a help desk staff. Give users ample opportunity to voice their complaints or concerns. Don’t switch into problem-solving mode too early in an incident when a user wants to complain. Instead, use empathy:

> “I understand why someone who has experienced this problem would be upset . . .”

Many support organizations treat complaints as a valuable source of feedback and suggestions for future product and service offerings. Try to understand that most complaints are not directed at you personally, and learn (it takes practice) not to be defensive about complaints.

**Contacts by “Power Users”**

In this context, power users are those who are technically very knowledgeable (or think they are) or who believe they warrant special attention or treatment because they have personal connections with significant people in an organization. These users often describe their powerful position early in an incident in an attempt to establish how important they are and occasionally to mask their actual lack of knowledge about their computer system. They may, for example, try to impress a support agent to direct attention away from what they don’t know. One strategy for handling these users is to use inclusive language that makes them feel like a member of a team. Use pronouns like “we” to refer to the problem-solving process, such as:

> “I think we can solve this problem if we work on it together. . . .”

Use an authoritative tone or speaking style because important, knowledgeable users like to communicate with important, knowledgeable agents. Remember that your role is not to diminish their sense of self-importance but to solve the problem they contacted you about.
Incidents That Get Off Track

Occasionally in the course of resolving an incident it becomes apparent that the process has taken a wrong turn and needs to get back on track. For example, a user might make a statement that contradicts an earlier statement. Or perhaps repeated attempts to isolate a problem have not succeeded. An incident during which a user becomes confused or that results in some unfruitful approaches indicates the process is off track. When this happens, try to refocus the process. Apologize to the user for the lack of a prompt resolution, summarize the basic incident information, and offer to continue to work toward a solution. Express confidence that, together, you will find a solution to the problem if you continue to work on it and that perhaps a different approach will achieve the results you both want.

Users Who Are Upset or Angry

Angry users are the most common kind of difficult incident. Angry users may be upset because of the way they have been treated. They may have been on hold too long, sent or received too many e-mails, worked with too many support agents, or explained the problem too many times. Or, they may be upset because of real or perceived inadequacies in a product. They may also be angry due to circumstances that are totally unrelated to the problem at hand, such as a negative encounter with a coworker or family member.

The first principle for handling angry users is to let them vent their anger. Say little during this period, and especially don’t offer an explanation or switch to problem solving too early. Explanations to an angry person sound like an invitation to argue. The second principle is to reassure angry users that the problem is an important one, and that you are willing to work with them resolve it. The third principle to remember is that angry users may continue to vent several times before they work through their anger. A polite question that refocuses the angry user may be effective, such as:

“What would you like me to do to help at this point?”
“How can we resolve this situation to your satisfaction?”

Remember to avoid defensiveness and don’t sound patronizing. An angry user is rarely upset with you personally. As with all incidents, continue to follow up on promises made to an angry user to build trust and confidence.

Users Who Are Abusive

Abusive users are rude, use inappropriate language, or make personal attacks on a support agent. A support agent’s first goal is to transform an incident with an abusive user into an incident with a user who is just angry, and ultimately into an incident with a satisfied user.
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This goal is not always achievable. Some support centers have support staff who have special training and skills to handle abusive users; these workers pride themselves on their ability to defuse difficult situations. In general, handle abusive users according to the support organization’s policies and procedures for this type of user. For example, some support organizations instruct their agents to terminate an incident when abusive language is used. In other organizations, the support agents are trained to invite the user to use more appropriate and professional language:

“We would like to work with you on this problem. But we need to communicate about it in an appropriate and professional way. Is that agreeable with you?”

Users Who Are Reluctant to Respond

Users who will not answer questions or are reluctant to provide information are often confused, lack confidence, or don’t understand the questions. They may be inexperienced computer users. To obtain the information you need from these users, use very simple language and avoid technical jargon. Try different kinds of questions. For example, if open-ended questions fail to initiate a fruitful conversation, switch to questions that can be answered with yes or no, and begin with very simple questions, such as “Is there a Start button in the lower-left corner of the screen?” Or, switch to discussing the problem-solving process, such as “I’ll ask you some questions about what you see on the screen and you answer them if you can. Any information you can give me will help us solve the problem.” Also give positive feedback when a reluctant user does provide useful information, such as “I think that information will be helpful.” Finally, if a user continues to be reluctant to respond, suggest exchanging information in another mode (e-mail, chat session, telephone, or face to face) as a way to facilitate the problem-solving process.

Users Who Won’t Stop Responding

Some users have a hard time letting go of a problem. Even after a problem is solved, they may continue to explain how bad it was or how similar it was to another problem they encountered. To deal with excessive communicators, use behavior that indicates the contact is over. For example, briefly summarize the incident and describe the conclusion. Thank the user for contacting the support group. Express your conviction that the problem is solved. Use very short answers that don’t provide the user with lead-ins to additional responses.

Handling difficult users is never an easy task, but over time you can improve your skills with practice and patience. Inexperienced help desk and support staff can learn a great deal about difficult users from experienced support agents. Veteran agents are a good resource for organization-approved and time-tested techniques for dealing with difficult situations. Training sessions for new help desk and support agents often cover organizational guidelines for dealing with these situations.

**Client-friendly Web Sites**

Unlike face-to-face contacts, telephone calls, e-mail, and chat sessions, which are interactive, two-way forms of communication between clients and support agents, a support Web site is primarily a one-way method of communication. User support Web sites are a cost-effective way to communicate with end users, whether internal or external. Users like support Web sites because they can get answers to common questions quickly, at any time, and from anywhere there is Internet access. Because support Web sites are cost-effective and popular with end users, these sites are increasingly used to augment other modes of user support. However, customer service concerns and a customer-service ethic also apply to the design and construction of support Web sites. You have probably visited Web sites that were well-organized and simple-to-use with information you could find easily. And you’ve probably visited some that failed the ease-of-use test. If an organization is going to spend the resources to build a support Web site, it should build a client-friendly one. An organization’s support Web site is as much an extension of the business or agency as the other forms of contact with clients.

Simple support Web sites can be built and maintained with popular word processors as well as with more powerful Web Page development tools such as Microsoft FrontPage, Macromedia Contribute, or Adobe GoLive. Although knowledge of Hypertext Markup Language (HTML) is useful, it is not a requirement with today’s Web development tools.

Because a support Web site is usually limited to one-way communication, a user support specialist who has a responsibility to maintain a support site needs a heightened awareness of
customer service concerns, and additional job skills to implement a successful site. The first issue in support Web site design is the purpose of the site. Common purposes of support Web sites include:

- Provide product information
- Take sale orders
- Contact technical support
- Provide software updates and downloads
- Communicate with end users

Four general criteria apply to written communications with end users, including Web site design. These four criteria are content, organization, format, and mechanics. A support Web site implementer uses these criteria as tools to evaluate how a Web site measures up to the customer-service ethic.

**Content**

Keep the product, support, and contact information accurate and up-to-date. Present a smaller amount of information that can be maintained and kept current rather than a larger amount of information that is out-of-date. Make the content relevant to what users need to know.

**Organization**

The design of a support home page is critical. An effective home page is eye appealing and well-organized, but avoids information overload and too many special graphic effects. Extensive graphics can affect download time for users with slower Internet connections. Some sites offer a text-only option to accommodate users with slow connections. The best support Web sites have menus, icons, and information “teasers” (summaries) on the home page, with links to more detailed information if a user desires.

Support Web sites can be organized by product, by function, or in other ways. Sites organized by product should include search capabilities in case a user cannot find a specific product by model number. Sites organized by function may include separate pages for product features and information, an FAQ knowledge base, software downloads, a shopping cart, support contact information, a site map, and a site feedback mechanism.

**Format**

Information should be formatted into small units. A document that takes more than two or three PgUp or PgDn keystrokes to access it can be broken into multiple pages or easy-to-find sections.

Navigation aids expand the usability of a Web site. A well-formatted Web site includes multiple ways of accessing information, including navigation aids (to return to the top of a
long page, to jump to the next or the previous page, or to return to the home page), a search engine to help locate specific information, and menu icons to access main topics. The pages, navigation aids, and menu bars should be consistent across the site. Fonts and format features should maintain a consistent style and feel.

**Mechanics**

Check spelling and grammar on all Web documents as well as FAQ databases. Use a briefer writing style with a fairly low readability index for most Web site information.

Chapter 12 discusses these four criteria—content, organization, format, and mechanics—in more detail.

A good example of a Web site that illustrates many of these design elements is Dell Computer's site at support.dell.com. Another good example is Gateway's site at support.gateway.com. What Web sites have you discovered that you think are easy to use and contain support information useful to you?

A Web site devoted to user support is useless unless users know about and visit it. A support site can be registered with popular search engines so that Web surfers who enter relevant keywords will locate the site. A support Web site can be prominently displayed in user manuals and in online documentation (for example, a link on the toolbar of a software product). The Web site reference can be included in product literature, organizational newsletters and brochures, as well as business cards. Pointers to a support Web site can also be included in support phone calls, e-mails, and chat sessions.

To learn more about the features of Web sites that increase their usability for clients, visit www.usabilityfirst.com/index.txt.

Many colleges and professional-technical schools offer coursework in Web site design, implementation, and maintenance. These courses are a good way to add value to a user support resume.

**COMPREHENSIVE CLIENT SERVICES**

Whether client services are two-way (as in face-to-face contacts, telephone calls, e-mail, or chat sessions) or one-way (as in a support Web site), communication and interpersonal skills are essential to provide excellent client services. Yet a comprehensive approach to excellent client service is also based on specific organizational values, attitudes, and actions.

First, client services start when each employee, from high-level managers to the newest support agent, recognizes that its clients are the primary reason for the organization's
existence. Each employee’s job depends directly on client satisfaction. Most support organizations’ mission statements express the commitment that each end user’s enhanced productivity is a primary objective of the support staff. In a user support environment, client productivity and satisfaction are directly related to the extent to which each user is treated as a valued client at all levels.

Second, customer service excellence is based on whether a support staff is willing to take extra steps to make sure clients are satisfied. For example, an excellent support organization keeps its clients apprised of the progress or lack of progress toward a problem solution. It actively promotes win-win outcomes for each incident. It seeks agreement that problems have been adequately addressed, and then conducts follow-up client surveys to measure the extent of client satisfaction and identify areas where client relationships can be improved.

Third, excellent customer service depends on adequate support resources. Customer service excellence rarely happens by accident, but is based on advanced planning, adequate staffing, and a sufficient budget for help desk tools and information resources that encourage excellence. A sufficient support budget is not always easy to achieve because support expenses are sometimes difficult to justify, as you will learn in Chapter 7.

Excellent customer service does not necessarily mean that the client is always right. Sometimes requests by even the most valued clients cannot be met for a variety of sound business reasons. In those situations, stress what you can do for a user, and look for alternate ways to meet user needs.

A comprehensive client service orientation among a support staff must apply not only to every staff member in an organization, but also to every mode of communication with users. Although most of this book covers technical problem solving and operational details associated with the day-to-day operation of a help desk or support center, this chapter on communication and customer service is the most important one in the book. Why? Because you can perform all the technical and operational duties of a support job adequately and still fail if you don’t provide excellent service to your clients.

**CHAPTER SUMMARY**

- Communication and interpersonal relationships are the foundations of excellent customer services, which is a goal expressed in many support organizations’ mission statements. Communication is a process that involves listening and reading, understanding, and speaking and writing skills.

- The most important communications skill for help desk and user support staff is the ability to listen to or read information provided by clients. In addition to a description of a user’s problem, help desk staff need to evaluate a user’s language level so the staff can pitch their responses to a similar level. Help desk staff need to listen or read for cues that indicate whether a user is frustrated, confused, or angry.
Understanding a client involves being able to restate a problem, but it also means an ability to empathize with the user’s situation and feelings and to understand why the problem is an important one for the client.

The ability to respond effectively includes skill with a greeting, the use of scripts as aids, and the ability to use a tone and style that helps rather than hinders. An appropriate tone is often more important than the content of a communication with a user.

Support agents should develop a personal incident management strategy. Goal-directed diagnostic questions, honesty, as well as an ability to say “I don’t know,” to apologize, to create user self-reliance, and to thank a user for contacting a support group are all components of a personal incident management strategy.

Some barriers in communication between a user support agent and an end user may be related to differences in basic personality types and work styles based on the Myers-Briggs classification scheme.

Difficult support incidents include user complaints, incidents with power users, incidents that get off track, incidents from angry or abusive users, and incidents from users who are either reluctant to respond or who won’t stop responding. Skilled support agents develop specific strategies to channel difficult users into satisfied ones.

A user support Web site is a cost-effective way to communicate with users. Web site developers need additional skills to manage information content, site organization, a client-friendly format, and writing mechanics to build a support Web site that meets the goals of a customer-service ethic.

A comprehensive approach to client services includes not only communications skills but also an organization-wide recognition of the importance of each client, a willingness to take extra measures to satisfy users, and adequate support resources to provide client satisfaction. Comprehensive customer service applies equally to telephone, face-to-face, and written interactions with users.

**Key Terms**

- **customer-service ethic** — An organization-wide philosophy—shared by everyone from top management to operational staff—that client relations and client satisfaction are the most important aspects of a business.
- **difficult client** — A user who requires special handling strategies because he or she is angry, not communicative, rude, or exhibits other hard-to-handle behaviors. The challenge for a support agent is to transform a difficult client into a satisfied one.
- **empathy** — An understanding of and identification with a user’s problem situation, thoughts, and feelings; a support agent who can empathize with a user understands the problem or question from the client’s perspective and why it is important to the client.
- **greeting** — The first few sentences in a support incident that introduce the agent, form the basis for the first impression of the support service by the user, and get the incident started with a positive approach.
incident management strategy — A collection of tools, techniques, and strategies that support agents use during an incident to move effectively and efficiently from the initial greeting to the conclusion of the incident.

power user — A user who is technically knowledgeable (or believes that he or she is), or who may have a relationship with an organization that he or she feels warrants special attention to his or her incident.

script — A prepared sequence of questions and statements that support agents can use to handle parts of an incident; may include decision points and branches to handle different situations.

self-reliance — A goal of support service providers that seeks to increase user self-sufficiency and reduce a user’s dependence on support services.

support Web site — A Web site devoted to provide clients with product information, software downloads, support staff contacts, and a sales channel; support Web sites are a cost-effective method to communicate with users, but should be designed to be client-friendly.

CHECK YOUR UNDERSTANDING

1. True or False? Communications skills are often more difficult for a new help desk agent to learn than technical skills or business skills.

2. A(n) _____________ is a choice each support agent makes about how professional or casual, how respectful or condescending, how formal or informal, or how terse or verbose they will be in their interactions with users.

3. A user’s first impression of a support agent usually comes from the ___________.
   a. incident greeting
   b. solution to the problem
   c. incident script used
   d. agent’s tone and style

4. True or False? Empathy means a user support agent takes ownership and responsibility for a user’s problem.

5. A support agent should make liberal use of the word _____________.
   a. I
   b. you
   c. we
   d. they

6. One measure of whether a support agent understands a user’s problem is that they can express the problem in _____________.
   a. the user’s actual words
b. the support agent’s own words  
c. industry standard vocabulary  
d. the wording of the script for the problem  

7. About ____________ percent of the meaning in a communication is based on the actual words used.

8. True or False? Of the three essential communications skills, listening or reading comes before understanding and responding.

9. True or False? Scripts designed to guide a user support agent through an incident should be memorized or read verbatim to a user to be effective.

10. True or False? One of the goals of incident management is to help users be more self-reliant.

11. Which of the following is not a primary strategy for a support organization that aims for customer service excellence?  
a. Treat clients with respect.  
b. Explain to clients what you can do for them.  
c. Agree to any demand a client makes.  
d. Return calls to clients when promised.

12. Which of the following is not a recommended incident management strategy for support agents?  
a. Ask goal-directed diagnostic questions.  
b. Say thanks.  
c. Teach the user self-reliance.  
d. Never admit that you don’t know.

13. True or False? A customer-service ethic is an organization-wide philosophy that the client is always right.


**Discussion Questions**

1. Why are communications skills often more challenging for inexperienced support agents to learn than technical or business skills?

2. Should a support agent ever just hang up on a caller who is rude or uses abusive language? Describe some pros and cons to this approach, and explain your position.

3. Are providing excellent user support and teaching user self-reliance contradictory strategies? Explain why or why not.

4. Will different work styles and communication differences among workers who have different MBTI personality types inevitably lead to conflict? Explain your position.
HANDS-ON PROJECTS

Project 3-1

Update a mission statement. A mission statement is a list of guiding principles that communicates support goals and objectives to staff, users, and management. Modify the following mission statement to include a greater emphasis on excellent communication and customer service. (For more information on mission statements, see Chapter 7.)

User Support Group Mission Statement

The mission of the user support group is to: (1) maximize operational efficiency among users in an organization by providing timely resolution to technology use questions, and (2) effectively manage problems to continuously improve the:

- Quality of support services provided to users
- Usability of information systems
- Effectiveness of documentation and training
- Users’ satisfaction with support services

Project 3-2

Differentiate difficult users. This chapter described several kinds of difficult users, including two that are not always easy to differentiate: users who complain and users who are angry. Sometimes few differences exist between the two. Assemble a team of three classmates or coworkers and compare your personal experiences with users who want to complain and those who are angry. List at least three characteristics of complainers and at least three characteristics of angry users that would help support agents distinguish between the two user types.

Project 3-3

Develop an incident management strategy. Based on the ideas in this chapter and on your personal experience (or on the experiences of a team of your classmates or coworkers), write a list of at least eight incident management do’s and don’ts that could be covered in a training session for inexperienced help desk agents.

Project 3-4

Interview a support agent about difficult users. Invite a help desk agent in your school or company to talk with you and your classmates. Ask the agent to describe any experiences with difficult users and the techniques he or she uses to handle them. In addition to those described in this chapter, what kinds of incidents does the support agent find difficult to
handle? What is the most common kind of difficult incident in his or her experience? Write a brief report that summarizes the main points of the interview.

**Project 3-5**

**Explore ways to improve client service.** Read an article about customer service available on the Internet at techupdate.zdnet.com/techupdate/stories/main/0,14179,2804684,00.html (“Improve Customer Service—And Cut Costs” by George Lawton). Write a short abstract of the article that lists the title, author, and source of the article (URL), and then answers the following questions:

1. Who should read this article (intended audience)?
2. What recent trends in customer service does the author describe?
3. What will readers of this article learn (list the main points)?

**Project 3-6**

**Encourage client self-reliance.** Voiceboard Corporation is an organization that develops and sells hardware and software products for PCs, including network and processor components, boards, and software drivers. The Voiceboard Web site, at www.voiceboard.com/support1.htm, includes several guidelines for its clients on the company’s support policies and procedures. First, read Voiceboard’s support guidelines. Then prepare a list of at least three ways that Voiceboard tries to make its clients more self-reliant.

**Project 3-7**


1. List the three worst mistakes that were made in the incident described in the report.
2. For each mistake you listed, describe the customer service principles and guidelines in this chapter that were violated.
3. Write a recommendation from you to the help desk manager that summarizes how she or he should deal with future incidents like the one described in the report.

**Project 3-8**

Read an article on effective Web site design elements by Jennifer Stewart on her Write101.com Web site at: www.write101.com/101web.htm. Make a list of five suggestions for support Web site developers that are different from those described in the chapter.
CASE PROJECTS

1. An E-mail Reply for Bug-Free Software Limited

You are a support agent for Bug-Free Software Limited, which develops customized software for businesses on a contract basis. You receive the following e-mail message from a large client:

We received the custom Visual Basic programs from your new programmer and installed them on our system last week. It was obvious from the first time we ran the programs that the programmer was new to your organization. It was not clear if the programmer had much prior experience with programming or with Visual Basic. The new programs we received converted the information from our old COBOL programs to our report formatter fairly well, according to the specifications we provided her. But we discovered that she built the specific data conversion instructions into the Visual Basic programs. The programs lack the flexibility we need to handle all of the different data formats we have to convert. The programs should have been written with the conversion information in tables that are easily modified. The way they were written means we have to modify the programs every time we run them.

Write a reply to this e-mail that shows empathy for the problem and a good customer-service ethic.

2. A Script for Scott Shipping Corporation

You have been working as an internal user support agent at Scott Shipping for six months and have been chosen by your manager to help coach a new user support employee, Gene Rosso. Like many organizations, Scott Shipping records selected support conversations for training purposes. To give you some training and mentoring experience, your manager has asked you to examine this transcript of one of Gene’s support interactions and write Gene a memo with suggestions about how he can improve his communications skills and demonstrate an improved customer service orientation. Suggest alternate responses for Gene that improve the quality of the customer service interaction.

Gene: This is the problem hotline. What's your problem please?
User: This is Wes in Accounting.
Gene: Oh, yes, I remember you. I've talked with you several times before. What's the problem now?
User: I'm having trouble printing a report this morning.
Gene: What kind of trouble?
User: I've clicked on Print three times and gone down the hall to get the printout, but each time there is just a stack of about 50 sheets in the printer with a line or two of junk characters on each one. But my report is not there.
Gene: Oh, we’ve been hoping whoever was wasting those reams of paper would call.
User: I’m sorry, but I’ve never had this problem before. What am I doing wrong?
Gene: What are you trying to print?
User: The report is in a file named REPORT2004.EXE.
Gene: Didn’t the training course you took cover printing .EXE files? .EXE files are programs, not reports. You can’t print an .EXE file, you can only run them.
User: Oh, I see. I guess I forgot about that. I feel like an idiot.
Gene: Yes, well, see if you can find a file on your hard drive named REPORT2004 with a different extension and call me back.

3. User Support Personality Types

Based on your understanding of the 16 personality types in the Myers-Briggs classification and on your knowledge of help desk communications and customer service skills described in this chapter, work with a team of three classmates or coworkers to identify which of the 16 MBTI types you think is best suited to provide a strong customer service orientation. Would more than one of the 16 types be effective?

If you have never taken the Myers-Briggs test or have not taken it recently, you may be able to take the test at your school’s Counseling department or at your organization’s Human Resources Office. If you would like to take a shorter, online version, go to The Keirsey Temperament Sorter II Web site at www.advisorteam.com/user/kts.asp.

If the results indicate that your personality type is not as well suited for help desk or user support work as other personality types, understand that the 16 MBTI personality types are not absolutes. Each person is actually a mixture of the eight pure categories in the test. The MBTI test simply measures tendencies. Most people are more adaptive than the test often indicates.

Write a summary of your research into the MBTI personality types and customer service orientation among help desk staff.
4. A Complaint Handling Script for Re-Nu-Cartridge

For background information about Re-Nu-Cartridge, see Case 4 in previous chapters.

Molly Jeavsey, who works in the administrative group at Re-Nu-Cartridge, is the person to whom complaints about company products are directed. Molly has kept a tally of which products generate the most complaints. She periodically passes the complaint tallies to the product design engineers in the manufacturing division as feedback on problems end users or retail stores encounter with Re-Nu’s cartridges.

Recently the engineers became aware of a large volume of complaints about a particular cartridge for a new model of printer. They have asked Molly to collect more information from users and retailers about the problems with the new cartridges. One engineer suggested that Molly collect more information from complaints about any Re-Nu cartridge than a simple count.

Help Molly by writing a draft of a script she could use to collect basic information about the problems users and retailers are encountering with Re-Nu’s cartridges. The script you write should respond to two goals: (1) to collect basic product information that would be useful to Re-Nu-Cartridge’s engineers, and (2) to exhibit a diplomatic way of asking for information that reflects an excellent customer-service ethic.

Compare your script with that of others in your class or workgroup to look for ideas on how to improve your script.