

Initial Call Intro:

Thank you for calling the IT Service desk, this is \_\_\_\_\_ speaking. To better assist you, please provide your corporate email address, and a good number to contact you at in case we get disconnected.

\*START TICKET\*

Find out about the issue and fill out your ticket:

I’m going to create a ticket for you in our system so that you will have the ticket number for your reference.

* Listen to the customer and capture detailed notes to input into your ticket. Be sure to capture **ALL** of the listed information below and put it into the ticket during creation.
  + Type of ticket
    - Most tickets that are called in will start as a L1 ticket. If the ticket requires assistance from a L3 tech, we can escalate this later.
  + Category of ticket
    - What does the issue pertain to? (Ex: Networking, Office 365, Onboarding, etc.)
  + Priority
    - How far does this issue reach? How many users is it impacting? Widespread issues that prevent multiple users or offices from working will usually be considered urgent, with less severe tickets ranked lower, but this will very from ticket to ticket. Use your best judgement to determine how quickly this needs to be addressed.
  + Group
    - What company is this ticket for? You can usually get this information from the caller’s email address.
  + Agent
    - Who you are assigning to the ticket.
  + Description
    - What is the issue? Describe, in detail, what problem the user or users are facing. Do not include troubleshooting steps taken in this portion, add that in a separate note in the ticket.
    - Find out when the issue started happening
    - If multiple users are being impacted
    - \*\*Capture any other initial details from the customer in your notes.\*\*
  + Tag
    - TAG YOURSELF ON THE TICKET

I have generated a ticket for you, here is the ticket number for your reference. \_\_\_\_\_\_\_\_\_\_\_

*\*\*note – here you need to create a Private note – and start taking notes on everything you are doing to solve the issue, in the event that we need to escalate to L3 all notes will be there and ready for him.*

Initiating the screen share:

\_\*NAME OF CLIENT\*\_, I would like to start a remote session so we can take a look at the issue and attempt some troubleshooting steps with you today. Please be sure that all private or confidential information is closed as I will be able to see your computer screen, including any extended monitors.

\*Start remote session through VSA/N-able, or Helpdesk using the script below\*-

Please go to Skytek.cloud and click the “Get Assistance” button along the white bar near the bottom of the page.

\*Create HelpDesk connection while instructing the client\*

\*Provide client connection ID\*

A download should be starting now, this will appear along the bottom of your screen or in the downloads folder in the upper righthand corner of your browser’s toolbar. Please open that application and provide it administrator access if requested.

Working on the issue:

* Keep running notes of everything that you are trying to solve the issue, this is critical if we need to escalate this to L3, all Private notes should be in there.
* Try to talk with the customer while you are solving the issue, build rapport and relationship with clients, don’t just work in silence as that makes them uncomfortable.
* If they need access at any time to their system, you can reschedule the call.
* Most important, if you are stuck on the issue, [not making progress] or unsure how to solve, we need you to send a teams message to the core chat, and provide the ticket number, so that an escalation engineer can start reviewing the notes, so that when you bring them into the call they will be up to speed.
* Before bringing in a L3, send a message to the teams L2 chat or Core chat, and see if anyone has seen the issue before. Also check our knowledge base for any insight into the issue.

Bringing in Escalation Engineer:

If you have taken longer than 20- 30min on an issue, you must escalate this to L3 (unless you are confident you can resolve it {think Office 365 installs, and other basic but time consuming issues})

Here is the call script for the escalation process:

Hi \_\_\_\_\_\_, this issue is taking a bit longer than expected, to expedite the resolution for you I’ll be conferencing in one of our L3 engineers to assist us. Can you hold for a minute while I conference in our escalation engineer to assist?

* Place the user on hold.
* Place a message in the Core chat and provide the escalation tech the ticket #. This is why it’s critical that you keep detailed notes on everything you have tried so far on the ticket. Please be sure to update the ticket before bringing in an L3.
* Once a L3 is on, let him connect to your system with teams, then bring the customer back on the line.

Hi \_\_\_\_, thanks for holding, I have \_\_\_\_, one of our Sr. escalation engineers on the line to assist us.

The L3 tech, will then make his introduction and take control of the call. But stay on the call and ensure you let the client know you are also on the call as well.

Ending the call:

\_\_\_\_\_ , we really appreciate your patience on the call today, I hope that we were able to resolve the issue to your satisfaction. Is there anything else that I can assist you with today while we have you on the line?

-No-

Please let us know if we can be of any further assistance. In a few moments we will be sending you a brief customer satisfaction survey to your email, and would appreciate any feedback on the service I have provided to you today.

Thanks again for calling the IT Helpdesk and have a nice rest of your day.

This script should act as a guide to formatting your call, and you should touch on every green section in this script, but this is not all you should be saying. Please be sure to be kind and courteous throughout the call. Remember, if they’re talking to us, they’re probably experiencing an issue that’s frustrating them. Sympathize with the client, and never make a client feel “stupid” for not knowing something basic. “You’re not alone” and ”We see this all the time” are great lines to use for this.

Additionally, try not to leave many long pauses while you’re with a client. Asking how their day is, how their weekend was or if they have plans, are great ways to fill dead spaces in conversation. You can also tell the client what you are doing while you do it to keep them informed.

If you know you are going to take awhile to work on an issue, feel free to place the client on hold. Just be sure to let them know that you will be placing them on hold while you resolve the issue, and do not leave a client on hold for more than 5 minutes without checking on them. You can also let them off the phone and call back when you’re ready, this is especially useful for new computer setups and software installs.