

Round Table Notes from the HDI Central Florida Chapter Meeting 6/12/19

These notes and topics on the following slides can be used for on-going productive discussions

1. How to build good relationships with customers

- Recognize that customers are on our Team
- Efficiently establish a personal connection and convey commitment to helping the customer
- Confirm the customer name, contact telephone number, and e-mail
- Follow security protocols, but be supportive of personnel supporting your customers
- Document all important customer-provided information within the ticket so that if it gets elevated or escalated, whomever is handling it does not need to ask the customer for the same information

2. How to improve effective listening

- Use active listening to hear more than the customer's words
- Show the customer that you understand how they feel
- Friendly language and tone eases communication and collaboration
- Allow customer venting, use pauses to reassure them, and demonstrate your commitment to helping them. Offer two options to a difficult customer in order to facilitate cooperation, if necessary (e.g. "If you let me have 5 minutes, I can probably identify the cause and probably resolve this ticket or I can elevate this to Desktop Support, but due to the SLA, it will probably take longer for your ticket to get resolved")
- Capture knowledge in the customer's language
- Respectfully validate the customer's point and question until you understand the incident: trust, but verify
- Do not allow scripting to get in the way

3. How to improve engagement and morale

- Ensure support personnel understand the critical nature of their roles to patients and the organization, and share examples of impact due to tickets not being resolved in a timely manner
- Take a Team approach to fulfilling objectives, but have individual accountability
- Encourage personnel initiative regarding stagnant tickets and repeated requests for support
- Build trust, review process, and do not react negatively upon a first ticket mishandling
- When willingness to improve is high, and competence is high, a non-punitive approach to addressing a mistake facilitates coaching, learning, and development. If competence in a role is low, training, reassignment based upon strengths, and counseling are options.
- Position personnel in roles that leverage their strengths
- Learn the career goals and desires for each of your staff, so that you can identify training and development opportunities, optimal current positions, and future positions for them

Suggested Round Table Topics of Interest

1. Turnaround and knowledge deficit
2. Correct ticket assignment
3. Selecting the appropriate level of support
4. Utilizing all resources and asking questions before ticket assignment
5. Dealing with high complexity: technical, work flow, etc.
6. Dealing with irate and non-cooperative customers, including those who push back regarding sharing information or following instructions
7. How to set up a public facing knowledge base
8. How to create a user friendly service catalogue and market it
9. Remediating single point of failure
10. How to build good relationships with customers
11. How to improve effective listening
12. How to improve engagement and morale