

Thank you for calling. Now what?

Tips for Running a Friendly and Efficient Help Desk

If your company provides a help desk, you know that attitude matters. In many cases, a rotten customer service experience is the #1 reason customers jump ship or—maybe worse—give you a terrible review in cyberspace. If you want to create a better experience for your customers and make the help desk a more pleasant place work, read on.

- **Set clients up to succeed.** Provide helpful information (such as tip sheets, user guides, and a knowledge base) to clients when service begins. Preparing your clients beforehand will nip problems in the bud—and halt panicked callers before they pick up the phone.
- **Have a plan.** Know who represents the first line of defense, the first escalation, and the manager who can help resolve tricky questions when everyone else is stumped.
- **Define company success.** Is your #1 goal short wait times? Quick resolution? Or the lack of multiple callbacks? Decide what “great customer service” means to your company, how you will provide it to your customers, and how best to train your support staff to strive for it.
- **Don’t create Jacks and Janes of All Trades.** Technologies are more complex than ever. Instead of expecting all your support personnel to be excellent in every category of support, encourage staff to focus on areas in which they excel and be known to their team for their subject matter expertise. Divert tickets to those best equipped to handle them.
- **Document, document, document.** File tickets, even for a seemingly simple problem, and track all communication with clients. This attention to detail ensures a reliable paper trail for this incident, but can also serve as an historical document and training tool for future events.
- **Know your limits.** Are you a full-service help-desk or a pay-to-play concierge service? Ensure your representatives know the level of service to provide or you may end up overserving customers with lower level service agreements.
- **Ask for feedback.** Conduct client surveys to keep a finger on the pulse of how your service is perceived. Send surveys immediately after issue resolution (when you’re likely to get the most honest feedback) and at regular intervals (to ensure your clients know you’re thinking of them and are available when you are needed). This is also a good way to collect positive feedback about specific employees who either may need additional training or who can serve as experts—and can be called out for recognition later.
- **Measure and revise.** Remember all those surveys you’ve been collecting and tickets you’ve tracked? Analyze them and use the metrics to assess staffing, identify new SMEs, and find gaps in your customer-facing documents and resources.
- **Support your support staff.** Help desk reps must combine advanced technical knowledge with friendly, patient customer service, all in the face of stressed out callers. If they are overworked, understaffed, or ill-prepared, their service will suffer. Meet with them regularly to ensure they have the resources and training they need to be at the top of their game.
- **Celebrate successes.** Providing support can seem like a race with no end, especially when service is ongoing rather than project-based. Identify (or create!) milestones at which you can celebrate your team’s progress or good work. When a client praises your team, send email

internally sharing the comments. Provide small awards, thank you notes, or gifts to recognize superior work both for your team and for exceptional individual performance.