

DONNA KNAPP, ITSM ACADEMY

Q: What should be included in a monitoring checklist?

A: A monitoring checklist should describe the specific criteria supervisors or team leaders are using to measure the quality of a call. Criteria may include:

Sample Monitoring Checklist¹

- Use Standard Greeting
 - Service Desk, this is Lizette. How may I help you?
- Listen Actively
 - Respond to the customer (e.g., uh-huh, I see, I understand)
 - Ask questions
 - Verify understanding (state back, paraphrase)
 - Listen to what is being said and how it is being said
- Demonstrate a *Can Do* Attitude
 - Positive, Caring
 - Avoid negatives (i.e., I can't, We don't, etc.)
- Build Rapport
 - Use the customer's name (including titles when appropriate (e.g., Dr., Professor, etc.))
- Ask skill assessing questions (when appropriate)
- Collect required information (i.e., to log the call)
 - In the same order every time
- If the Incident must be escalated:
 - Determine the priority
 - Recap next steps
 - Provide an Incident #
 - Provide a Workaround (if possible)
- If a solution can be provided:
 - Deliver the solution at the customer's skill level
 - Provide a little something extra (when possible)
- Verify customer satisfaction
- Use Standard Closing
 - Ask if there is anything else we can do
 - Thank the customer for calling
 - Let the customer hang up first

¹ Excerpted from A Guide to Customer Service Skills for the Service Desk Professional

Q: What should I do if I sense that a customer is becoming angry?

A: When a customer is particularly upset, even angry, it's important that you address their question or concern during the first of three stages of anger.

- During **Stage 1**, the customer is describing the inconvenience of their Incident or concern.

"I've had to wait 20 minutes to get through. Why can't you people learn to pick up the telephone?"

"This is the third time I've called about this printer this week. Why can't you get someone out here that will fix it right?"

- During **Stage 2**, the customer is starting to be angry with you as he or she perceives that you are not acknowledging and/or addressing his or her concern.

"I don't seem to be getting anywhere with you. Let me talk to your Supervisor."

- During **Stage 3**, the customer is doing something about it.

He is calling your bosses boss, she is writing a letter, they are telling 20 other people how bad the service is at the Service Desk.

To handle a difficult customer situation...²

- Let the customer vent
 - Make sure you are listening... *actively*
 - Don't take it personally; picture yourself and the customer against the problem
 - Acknowledge the customer's emotional state; empathize
 - Restate the situation and gain agreement that you understand
 - Begin active problem solving
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² Excerpted from A Guide to Customer Service Skills for the Service Desk Professional

Q: How can I become a better listener?

A: Here are some listening do's and don'ts that are particularly useful when interacting with customers. Many of these represent excellent life skills.

Listening Tip Sheet³

☞ **Listening Do's...** ☞

- Let others talk first
- Concentrate (pay attention)
- Listen for main ideas
- Take notes
- Assess the customer's emotional state and level of expertise
- Acknowledge the customer's emotional state; Apologize or empathize
- Stifle your own emotions
- Seek understanding; Ask questions; Restate

☞ **Listening Don'ts...** ☞

- Interrupt
- Finish the customer's sentence
- Assume

If you want people to listen to you... listen to them.

We've all seen the movies where a Sergeant shouts in the face of a wet behind the ears soldier "I CAN'T HEAR YOU." Remember, when you are on the telephone, customers can't hear you nodding your head, or taking notes.

Effective ways to convey that you are listening include:

- "I agree (understand)."
- "Could you expand on that?"
- "I see what you mean."
- "Uh-huh."
- "Could I jump back to something you said?"
- "I'm sorry, you started to say..."
- Echo or paraphrase: Repeat or restate the last few words spoken by the customer

Q: (A question for you from ITSM Academy) If during the webinar you thought to yourself... "we're doing a lot of what Donna talked about," ask yourself this... "how well are we doing and how can we improve?" There is always room for improvement and National Customer Service Week is a great opportunity to introduce new and innovative ways of working; with a little fun thrown in for good measure.

Thank you for being our customers
Have a great week!

³ Excerpted from [Customer Service Excellence for the Service Desk Professional](#)