

SCRIPTS & SCENARIOS

HANDLING THE IRATE CALLER THE FIVE FORBIDDEN PHRASES THE SIX CARDINAL RULES

Scenario #1: Caller has contacted the Help Desk 3 Previous Times with the same issue – and NO ACTION!

Mr. Stewart is calling the Help Desk for the 3rd time in the last two days for the same problem. His computer will randomly crash and reboot itself. He has lost several documents, is extremely frustrated and is just about at the end of his rope.

THE WRONG WAY TO HANDLE THIS SITUATION

HELP DESK: Good Morning. Client Service Help Desk. This is Stacey. May I have your customer ID?

MR. STEWART: This @#*% system has gone down again—this is the 3rd time I've called in two days and the @*@??# problem is still not fixed. I want someone to come up to my desk immediately and get this fixed!

<STOP HERE AND OPEN DISCUSSION>

- What would you say if you received a call such as this?
- What do you need to accomplish with this caller?
- What things must you positively avoid doing or saying with a caller such as this?
- Let's see how our Help Desk analyst responds to this call the **WRONG WAY** and then we'll review what could have been done differently for a more successful result

HELP DESK: Who is this?

MR. STEWART: It doesn't matter who this is. Let me speak to your supervisor.

HELP DESK: No—they're not here today. <SILENCE>

MR. STEWART: I'm going to get you fired. Now connect me to someone that can help me NOW!

HELP DESK: <CLICK> <HANGS UP THE PHONE>

THE RIGHT WAY TO HANDLE THIS SITUATION

HELP DESK: Good Morning. Client Service Help Desk. This is Stacey. May I please have your customer ID ?

MR. STEWART: This @#*% system has gone down again—this is the 3rd time I’ve called in two days and the @*@??# problem is still not fixed. I want someone to come up to my desk immediately and get this fixed!

HELP DESK: Good Morning Mr. Stewart (obtained from Caller ID). I sense your frustration and want to help you with this problem. I see that you called yesterday and opened a ticket for this problem. Let me take just a moment to open that record please . .

MR. STEWART: You don’t understand—I just can’t use this *\$#% computer.

HELP DESK: Again Mr. Stewart, my name is Stacey and let me see how I can help you get this problem solved. I can understand how you annoying this must be Mr. Stewart.

MR. STEWART: You’re darned right. It really makes me mad when I have to keep calling back to get service.

HELP DESK: I couldn’t agree with you more Mr. Stewart....this must be very frustrating for you. I want you to know that I will personally follow up with our Desktop Support group right now to make sure they put this trouble ticket at the top of their list. In the meantime Mr. Stewart, we have several extra computers in our training lab that I can offer you so that you can get your work done—may I reserve one of them in your name this morning—I’d be happy to get your documents transferred over and get you back up in running in no time.

MR. STEWART: Wow—that’s a pleasant surprise. The person I spoke with yesterday acted like they didn’t care about me or my problem. Yes...Id like to take you up on that offer. Can I come down at 9:30am?

HELP DESK: That’s great Mr. Stewart. I’ll reserve a computer for you from 9:30 until noon. Please ask for me when you get to our department which is located on the 3rd floor in Room 320. I’ll make sure to have an update on when your computer problem will be fixed when I see you.

MR. STEWART: Thanks Stacey....you’re a lifesaver!

<STOP HERE FOR DISCUSSION>

- **Why was the Help Desk Agent successful in defusing the caller?**
- **What phrases/techniques did he/she employ?**
- **Are there other ways this call might also have been successfully addressed?**

SUMMARY:

By using **EMPATHY** and taking **RESPONSIBILITY** (without pointing fingers or blaming the other department) Stacey successfully diffuses this client’s anger, offers him an alternative so that he can continue to be productive, and takes ownership and responsibility for following through with the Desktop Support Department to make sure that they get Mr. Stewart’s computer problem addressed and taken care of as soon as possible. Stacey also assumes responsibility for following through and providing Mr. Stewart with a personal update when he arrives at her department. Stacey goes the extra mile by offering her assistance when he comes down to Room 320. Good job Stacey!

Scenario #2: OUT OF SCOPE WORK

Mrs. Patrick is calling the Help Desk to request assistance with a problem she has been experiencing on her home computer...and she wants someone to come out to her house and fix the problem. Mrs. Patrick is a Vice President with the company.

THE WRONG WAY TO HANDLE THIS SITUATION

HELP DESK: Good Afternoon. Client Service Help Desk. This is John. How may I assist you today?

MRS. PATRICK: Hi. This is Danica Patrick. I just got a new computer at home and I can't get any sound out of the speakers at all. Can you help me with that?

HELP DESK: No. We don't handle that.

<SILENCE>

MRS. PATRICK: I thought the Help Desk was supposed to "HELP" with any computer problem. Can't you just send someone out to my house to fix this?

HELP DESK: No. It's against our policy.

MRS. PATRICK: Don't you know who I am?

HELP DESK: Yeah – I know who you are but the answer is still NO.

MRS. PATRICK: <Hangs up in utter frustration>

<STOP HERE AND OPEN DISCUSSION>

- What would you say if you received a call such as this?
- What do you need to accomplish with this caller?
- What things must you positively avoid doing or saying with a caller such as this?
- Let's see how our Help Desk analyst responds to this call the WRONG WAY and then we'll review what could have been done differently for a more successful result

THE RIGHT WAY TO HANDLE THIS SITUATION:

HELP DESK: Good Afternoon. Client Service Help Desk. This is John. How may I assist you today?

MRS. PATRICK: Hi. This is Danica Patrick. I just got a new computer at home and I can't get any sound out of the speakers at all. Can you help me with that?

HELP DESK: I'm sorry you're having that problem Mrs. Patrick. It can be very frustrating to have a new computer and not have it work properly.

MRS. PATRICK: Yes it is. I've been trying to listen to some training CDs and without the speakers working, I can't get through this training program. Is there any way that you can send someone out to my house today to help me with this? I'm working from home this week.

HELP DESK: Although I'd like to be able to send one of our Deskside Technicians to your home Mrs. Patrick, our Support Agreement only covers the computers here at the company. Are you in front of your computer right now Mrs. Patrick? <WAIT FOR ANSWER>

MRS. PATRICK: Yes, as a matter of fact I am.

HELP DESK: I'd like to give you several suggestions of things to try to get your speakers working. Do you have a few moments to work with me?

MRS. PATRICK: I do.

HELP DESK: I know it may sound obvious, but let's make sure that your speakers are turned on. There is generally a ON/OFF button or knob on the front of the right speaker. Can you tell me if you see a green light? <WAIT FOR AN ANSWER>

MRS. PATRICK: Yes, the speakers are turned on and I do see the green light, but I still can't get any sound from them.

HELP DESK: Ok—I have one more suggestion for you to try—can you make sure they are securely plugged into the back of your computer.....

MRS. PATRICK: Yes, they are.

HELP DESK: Hmmmmm---well we've checked all the obvious things. May I suggest that you contact the store where you purchased the computer? They frequently have on-site support available for new computers. I'm sure they would be happy to make a house call and get things squared away for you.

MRS. PATRICK: Thanks John. I didn't think of that. I'll give them a call right now.

<STOP HERE FOR DISCUSSION>

- **Why was the Help Desk Agent successful in defusing the caller?**
- **What phrases/techniques did he/she employ?**
- **Are there other ways this call might also have been successfully addressed?**

Scenario #3: HARDWARE PROBLEM – HIGH PRIORITY – OFFER LOANER

Joan Smith, the Executive Assistant to the Company President cannot get her computer to boot up this morning. She has a 10am deadline to get an Agenda prepared for her bosses upcoming meeting and out of town trip. She is nearly panic stricken thinking that her deadline will certainly be missed.

HELP DESK: Good Morning. Client Service Help Desk. This is Jason. How may I help you ?

JOAN: Oh....I'm glad you're there this early. You've got to help me now.

HELP DESK: Can you hang on a second?

<SILENCE>

JOAN: Is anyone there?

<SILENCE>

HELP DESK: Ok I'm back. Now what is your problem?

JOAN: This is Joan Smith. My computer is not powering up, I have a 10am deadline and I've got to get a working computer up here now.

HELP DESK: No one is here to help you.....they don't come in for an hour.

JOAN: Oh, lovely....just lovely. Now what am I going to do?

HELP DESK: I don't know.

<STOP HERE AND OPEN DISCUSSION>

- What would you say if you received a call such as this?
- What do you need to accomplish with this caller?
- What things must you positively avoid doing or saying with a caller such as this?
- Let's see how our Help Desk analyst responds to this call the **WRONG WAY** and then we'll review what could have been done differently for a more successful result

THE RIGHT WAY TO HANDLE THIS SITUATION:

HELP DESK: Good Morning. Client Service Help Desk. This is Jason. How may I help you ?

JOAN: Oh....I'm glad you're there this early. You've got to help me now. My computer won't power up this morning and I'm trying to meet a 10am deadline to get an agenda put together for Mr. Abrams.

HELP DESK: Well let's see how I can help you with this problem Joan so you can meet your deadline.

JOAN: Great. Can you get a loaner computer up here right away?

HELP DESK: That's a good question Joan. I'm glad you asked that—getting a loaner is the perfect solution to your problem right now. Unfortunately I am the only one here manning the phones and our Desktop Support group doesn't get in for an hour.

JOAN: Lovely, just lovely.

HELP DESK: But here's what I can do for you.....I have my personal laptop with me today and it has Microsoft Word on it--you were using Word, correct?

JOAN: Yes.

HELP DESK: I would be happy to lend you my laptop so that you can meet your deadline this morning, and in the meantime, I will open a trouble ticket and assign it to our Desktop Support Group. I'll alert them as soon as they come in this morning that you are having trouble with your machine and to make a visit to you their first priority. Would you be able to come down to Room 100? I will have my laptop ready for you to take back up to your office.

JOAN: Thank you sooooo much.

HELP DESK: My pleasure Joan....you are most welcome!

<STOP HERE FOR DISCUSSION>

- **Why was the Help Desk Agent successful in defusing the caller?**
- **What phrases/techniques did he/she employ?**
- **Are there other ways this call might also have been successfully addressed?**

Scenario #4: IMACs – SAME DAY PROJECTOR SET UP – NEW EMPLOYEE

Bob Jones calls the Help Desk with an URGENT request to set up a laptop computer and overhead projector in the SOUTH conference room for a 1pm meeting today. Bob is demanding because he hasn't taken the time to plan ahead for this meeting. He reaches Lakisha at the Help Desk who is a new agent—in fact, it is her first week on the phones.

HELP DESK: Good Morning. Client Service Help Desk. This is Lakisha. May I please have your customer ID ?

BOB: I don't have an ID. I need someone to come to the South Conference Room and set up a laptop and projector for me. I have a presentation that starts in an hour. Can you get someone up here?

HELP DESK: I'm new here Bob and frankly I don't know if that can be done.

<SILENCE>

BOB: Well can you find out?

HELP DESK: I don't know---I really don't know who to ask---they didn't cover that in our training.

BOB: \$#!!% it! I need someone up here right away. You people are so useless in a crisis.

HELP DESK: <CLICK> Lakisha hangs up the phone!

<STOP HERE AND OPEN DISCUSSION>

- **What would you say if you received a call such as this?**
- **What do you need to accomplish with this caller?**
- **What things must you positively avoid doing or saying with a caller such as this?**
- **Let's see how our Help Desk analyst responds to this call the WRONG WAY and then we'll review what could have been done differently for a more successful result**

THE RIGHT WAY TO HANDLE THIS SITUATION:

HELP DESK: Good Morning. Client Service Help Desk. This is Lakisha. May I please have your customer ID ?

BOB: I don't have an ID. I need someone to come to the South Conference Room and set up a laptop and projector for me. I have a presentation that starts in an hour. Can you get someone up here?

HELP DESK: Hi—This is Lakisha. To whom am I speaking?

BOB: Bob—Bob Jones up in Engineering.

HELP DESK: Good Morning Bob. I understand how you feel. It's a lot of pressure to get ready for a presentation and make sure all details are taken care of. You need a laptop and projector set up in the South Conference Room for a meeting in one hour, correct?

BOB: Yes, that is correct. Can that be done?

HELP DESK: Well Bob, that's a good question. If I can place you on hold for a moment, I will call our Desktop Support Group and get an answer for you. May I place you on hold?

HELP DESK: <Calls Desktop Support and makes arrangements for the laptop and projector to be set up in the South Conference Room within the next 10 minutes>

HELP DESK: Thanks for holding Bob. I have an answer to your question that will make you very happy! I have someone from our Desktop Services Group on their way to the South Conference Room right now to get that laptop and projector set up for you. Are you able to meet them down there?

BOB: Great news. Thanks for your help!

HELP DESK: You're Welcome. Glad I could be of assistance. Good luck on your presentation and have a wonderful day!

<STOP HERE FOR DISCUSSION>

- **Why was the Help Desk Agent successful in defusing the caller?**
- **What phrases/techniques did he/she employ?**
- **Are there other ways this call might also have been successfully addressed?**

Scenario #5: CHRONIC MACHINE PROBLEM – CALL NEEDS TO BE ESCALATED TO TIER 2

Mr. Jordan has become a ‘frequent flyer’ at the Help Desk, calling at least once a week or so to report a problem with his computer. The Help Desk has numerous tickets opened for the same or similar problem, has tried troubleshooting through remote access; has escalated the problem to the Desktop Support Group who has made many visits to his deskside to fix this problem—only to have it crop up again several days later. Mr. Jordan is obviously frustrated and is asking to have his computer replaced.

HELP DESK: Good Morning. Client Service Help Desk. This is Gena. What you need?

MR. JORDAN: What do I need? I need my computer fixed. That’s what I need.

HELP DESK: Well, don’t attack me. I didn’t cause your problem.

MR. JORDAN: We’re getting no where fast. Connect me to someone else will ya?

HELP DESK: I can’t do that. You’re stuck talking to me.

MR. JORDAN: I’m not stuck doing anything. I’ll take this up with your supervisor honey.

HELP DESK: You do that! I’ll tell them how mean you were to me too!

<STOP HERE AND OPEN DISCUSSION>

- **What would you say if you received a call such as this?**
- **What do you need to accomplish with this caller?**
- **What things must you positively avoid doing or saying with a caller such as this?**
- **Let’s see how our Help Desk analyst responds to this call the WRONG WAY and then we’ll review what could have been done differently for a more successful result**

THE RIGHT WAY TO HANDLE THIS SITUATION:

HELP DESK: Good Afternoon. Client Service Help Desk. This is Gena. How may I assist you today?

MR. JORDON: Hi Gena. I’ve been having a lot of problems with my computer over the last several weeks and it seems to be getting worse.

HELP DESK: I’m sorry you’re having so many problems Mr. Jordan. I know how frustrating that must be for you.

MR. JORDAN: I think it’s time we looked at just replacing my computer. Can you do that?

HELP DESK: That’s a good question Mr. Jordan. Let me take a look at your call history here for a moment so I can understand what’s been happening. <PAUSE> Yes, I see that you have been calling us

quite a bit over the last few weeks, and again, I apologize for these problems. Let's see what we can do to get a loaner computer in place for you today.

MR. JORDAN: Finally....a positive response. Thanks for your help.

HELP DESK: You're welcome.

<STOP HERE FOR DISCUSSION>

- **Why was the Help Desk Agent successful in defusing the caller?**
- **What phrases/techniques did he/she employ?**
- **Are there other ways this call might also have been successfully addressed?**

Scenario #6: PRINTER PROBLEM – PRINTERS ARE OUTSOURCED TO ANOTHER COMPANY

Mary Wilkerson is calling the Help Desk because her printer keeps jamming. The Help Desk does not handle printer problems and immediately escalates those calls to the outsourced group that does printer repair.

HELP DESK: Good Morning. Client Service Help Desk. This is Stacey. How may I assist you?

MARY: My printer keeps on jamming. I have a lot of printing to do and need this problem fixed.

HELP DESK: We don't handle those calls. You need to call the Printer group for that.

MARY: Oh really? I never had to call the Printer Group before. Why can't you just fix it?

HELP DESK: Like I said Mary—we don't service printers. Another company handles that.

<STOP HERE AND OPEN DISCUSSION>

- **What would you say if you received a call such as this?**
- **What do you need to accomplish with this caller?**
- **What things must you positively avoid doing or saying with a caller such as this?**
- **Let's see how our Help Desk analyst responds to this call the WRONG WAY and then we'll review what could have been done differently for a more successful result**

THE RIGHT WAY TO HANDLE THIS SITUATION:

HELP DESK: Good Morning. Client Service Help Desk. This is Stacey. How may I assist you?

MARY: My printer keeps on jamming. I have a lot of printing to do and need this problem fixed.

HELP DESK: I know how frustrating that must be for you. Printers seem to sense when you need them the most.

MARY: Isn't that the truth! Can you get someone up here to fix this thing for me?

HELP DESK: As much as I'd like to come up there right now and fix your printer problem Mary, in an effort to provide more cost effective service, printer repairs have been outsourced to the MultiMax Group. I would be happy to transfer your call directly to them so they can assist you. In the event we should become disconnected Mary, MultiMax's direct dial number is 555-1212. I'm going to transfer you now.

HELP DESK: <Dialing MultiMax> <MultiMax Rep answers> Hello Dawn---this is Stacey at the Client Services Help Desk. I have Mary Wilkerson on the line. Mary has been experiencing a lot of jamming with her printer the last several days and needs someone to come out and take a look. She also said she has a lot of printing to do today.

HELP DESK: <Patching Mary into the call> Mary, I have Dawn from MultiMax on the line right now. She will help you with your printer problem from here.

MARY: Thanks!

<STOP HERE FOR DISCUSSION>

- **Why was the Help Desk Agent successful in defusing the caller?**
- **What phrases/techniques did he/she employ?**
- **Are there other ways this call might also have been successfully addressed?**

QUICK REFERENCE & SUMMARY

REMEMBER THE FIVE POINT SYSTEM FOR HANDLING THE IRATE CALLER

1. It's Nothing Personal.
2. The ASAP Technique – Apologize, Sympathize/Empathize, Accept Responsibility, Prepare to Help
3. You can satisfy most of the people most of the time.
4. Use the Swear Stopper.
5. Don't Make Excuses!

THE FIVE FORBIDDEN PHRASES

1. I don't know.
2. I/we can't do that.
3. You'll have to . . .
4. Hang on a second . . . I'll be right back
5. NO!

ALSO –

- I'm new here
- We don't handle that
- It's our policy

THE SIX CARDINAL RULES OF CUSTOMER SERVICE

1. People Before Paperwork.
2. Rushing Threatens Customers.
3. Company Jargon and Slang
4. Don't be too busy to be nice!
5. "Uh-Huh" is not "Thank You"
6. Be Friendly BEFORE you know who is on the phone