
Writing A Useful Incident Description: *A Workshop for Help Desk Staff*

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A Writing Workbook for Customer Service Agents***



e-write.

Writing for online readers

The state of writing skills in your help desk

Writing skills they have:

- Recording details
- Documenting critical info
- Critical listening and reading skills
- Capturing details such as error messages
- Asking questions
- Keeping info current

Writing skills they lack:

- Too many acronyms
- Unfriendly tone
- Disconnect between the agent's and the customer's levels of understanding
- Poor mechanical skills: spelling, grammar, incomplete sentences, run-ons
- Inappropriate info and useless info
- No proofreading
- Important info missing
- slang



Terminology!! @##

- Trouble ticket?
 - Help desk ticket?
 - Ticket?
 - Incident write-up
 - Incident description
 - “ ...the field in the back-end system we use where we write what the customer was complaining about and how we solved the problem ... ”
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Review sample incident descriptions

Sample 1

- Writing strengths and weaknesses?
- Process strengths and weaknesses?

Sample 2

- Better than Sample 1?



Why write the incident description?

- So customers don't have to repeat the description of the problem to every help desk employee they speak to
- To track problems that come up
- Build a KB
- To delegate the task of solving the problem
- To document our work



Who is the incident description for?

- Those who will resolve the problem
- Other help desk staff
- KB users
- Customer?



What does the reader (Agent? Manager? Tier II?) need from the incident description?

- Who's working the issue
- Issue explanation, start of problem
- Where
- Workaround
- Solution
- Action Item
- All pertinent info
- Error messages
- Urgency
- What has the user done on their end
- Contact info
- How many affected
- Title of issue – KB



Unstructured vs structured write-ups

Unstructured

- Quicker for agent to write
- Adequate (?) record of problem and solution
- Acceptable if knowledge isn't going to be reused

Structured

- Scannable
- Reusable in other KM applications
- Reusable in other help environments
- Longer shelf life
- Useful for expert and novice agents alike



Sample 4 - Unstructured

Customer problem is motion sensor that is giving false alarms every few months. He is going to replace it, but wanted to see if he could leave the original one in a location near its original location, and then put a datalogger on it that would record time of day for any triggers on the unit. He would then download the data from that every few months and check for triggers at times of day when there should be no motion in the area. He says that if the replacement unit also starts to false trigger, and we see triggers on the original unit with the data logger, then he'll know it might be an animal or some real motion in the vicinity of the two alarms. If the replacement unit triggers and the original does not, then he'll look for a short in the wiring, connectors, etc. If the original sensor triggers and the replacement unit does not, then we have a bad unit. Cust wants to know des anyone make a data logger like what he's describing that has software that would work for this application?

not exactly what he has in mind... and may be a little extreme for this case... but cust could have a camera installed with a vcr recording on alarm input... then not only would he have a time he'd be able to see what was happening when it went off (or a second or two later anyway)

the only problem with this is that most vcr's require a normally open contact... and most motions are normally closed... i'm not sure if there's a way around this but perhaps the Tier twos around here do



Sample 4 - Structured

Problem

- Motion sensor giving false alarms every few months.

Workarounds

- Customer wants to try leaving the original sensor near its original location, and then put a datalogger on to record time of triggers on the unit. He would download the data every few months and check for triggers at times when there should be no motion in the area. He says that if the replacement unit also starts to false trigger, and we see triggers on the original unit with the data logger, then he'll there's real motion in the vicinity of the two alarms. If the replacement unit triggers and the original does not, then he'll look for a short in the wiring, connectors, etc. If the original sensor triggers and the replacement unit does not, then we have a bad unit.

Action Item

- Customer wants to know des anyone make a data logger like what he's describing that has software that would work for this application?

Solutions

- Customer could have a camera installed with a VCRr recording on alarm input. This would let him see was happening when it went off (or a second or two later anyway). Possible issues: most VCRs require open contact and most motions are normally closed.
- Involve Tier IIs in this issue



Next steps for improving ticket write-ups in your help desk

- Writing training
- Monitoring
- Feedback
- Peer review
- Identify best practices – public praise
- Build a structure for incident write-ups and share it with call-takers
- Create templates



Resources

- “The Call Ticket ‘Long Description’” (Muns Report, Vol. 5 No. 11)
- “Anatomy of a Trouble(d) Ticket” – presentation by Martha Lundgren (HDI Austin) at HDI Annual Conference 2007



Contact information

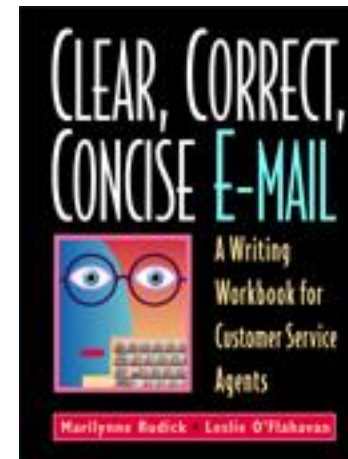
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