

# Customer Service

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# Intro to Soft Skills

Customer service is a critical skill in IT support. I can't emphasize that enough. The techniques we'll discuss in these videos won't only help you with your users, they help you work better with your peers, your managers, and maybe even your own personal relationships. Keep in mind, these techniques don't work in all situations. The reality is that no matter how great your customer service, some situations don't have a good resolution, plus everyone is different. You need to tweak your style when working with users. But the techniques we'll cover are intended to make your IT interactions more successful. In IT support, you work with users to fix technology and improve how people use it. To accomplish this, you need to develop a trust between you and the user. Lots of employers believe that good customer service also builds brand loyalty, which is a key to success. These lessons are meant to give you the foundational skills and techniques of how to deliver great customer service. Customer service practices can differ from company to company. We'll cover the key concepts of customer service in any IT support role. It's important to talk with your employer to understand the company's customer service approach. This will also give you an idea of how much freedom or restrictions you might have in the role. Spoiler alert. Great customer service requires exhibiting empathy, being conscious of your tone, acknowledging the person you're talking to, and developing trust with the user. If you remember nothing else from this lesson, remember those four things. The most important of all of these is empathy. What's the difference between sympathy and empathy? People will say things like sympathy is saying you're sorry. Empathy is feeling sorry. That doesn't really explain it. So let's use an example to drive this home. If someone fell into a dark, damp, dirty hole and you leaned over with a sad expression and said, that must be a really tough situation. Then you are expressing sympathy. You're sharing their feelings, but you aren't experiencing those feelings. If you crawl down into that dark, damp, dirty hole with the person who fell and said, this is a really tough situation, then you're expressing empathy. You're able to see something from someone else's perspective and understand their feelings. The word choice between the two situation is very similar. But the action you take by looking at it from their perspective, is what empathy is all about. Some days it's hard to empathize. I know from experience. Maybe you've had an argument with a loved one before work. Then by the end of the day, you find yourself getting annoyed or upset with users. That's the moment when empathy becomes the most important. Because anyone can showcase empathy when it's easy. But someone who persistently displays empathy will stand out as a kinder human and a more professional and effective employee. Once you have empathy down, you should think of your tone. Tone is historically thought of as how you speak out loud. In this technological age, when many of our interactions over texts and IT support is increasingly done remotely, tone isn't just about how you come off during an in person conversation. It's expanded into how you write, punctuate, and even spell. If your tone is short or blunt, then the user will feel brush off and devalued. But if your tone is friendly and curious, the user's much more likely to have a positive experience working with you. Be careful not to go overboard with the friendliness though, it could be disingenuous. Communicating a good tone is delicate balance. How you ask a question and how you respond to user's question matters. Let's say you tell a user in an email, turn your computer off and on again, and it will start working. They'll probably never respond and your company may have lost a

customer because the tone is just too short and pretty unfriendly. Well, it gets to the point. It doesn't leave the door open to conversation. What if instead you wrote, please try turning your computer off and back on again. This should update the change we made and fix the problem. If that doesn't work, just let me know. It's a little wordier, but it has a better tone of asking versus telling. Inviting them back to connect with you in case the issue isn't resolved, leaves the lines of communication open. Tone can be especially difficult when you're supporting someone in a different region or country. Make sure to familiarize yourself with the local style whether that's more conversational or direct, and adjust your style depending on the audience. In this day and age of text and email, it's easy to ignore what someone says. If a comment seems like a dig or it's just too much information provided, we tend to shy away from responding. It's also really common to forget to tell the user what you're doing while you're troubleshooting. That might leave the user waiting in an awkward silence. Whenever possible, acknowledge the user. This reduces the tension that might build and helps you understand how you're working toward a solution. Let's say you're chatting back and forth with the user. You're asking a lot of questions to better troubleshoot the issue. The user is answering them, but also makes comments like geez, I already answered this in my last email. Or I just want to know what's causing my problem. You choose to ignore this and continue on with your troubleshooting. You think you're close to solving the problem and these side comments are just a distraction. But then the user stops fully engaging with you and only gives you half answers to your questions. Now you're not able to solve the issue at all. The user's unhappy, you're unhappy, and the company's unhappy. It's a bad situation. Instead of ignoring the user in that situation, you could have said, I'm sorry for asking these questions. Sometimes repeating them will help new information and pop up. Or you could have said sorry for the repeat questions, I don't want to give you a superficial cause when we could fix the root issue and you won't have to chat with us again. This helps them to understand your method and become part of the solution. It's important to acknowledge your own actions if you think they might otherwise confuse the user, let's say user contacts you to fix something. After collecting some information, you go radio silent. What's user to do? Would they ask if you're still there? Will they wait awkwardly until you came back on the line, how long would they wait before ending the call or saying something? How would they feel about their interaction with you? Pretty awkward. But what if he said, I need to do some research on this issue. Would you mind waiting about five minutes or less while I do that? They'd probably say sure, and keep themselves occupied while they wait. They'd also feel more confident in your ability to resolve the issue. This leads to the most important thing to remember when working with people and that's developing trust. This is easy to do if you have repeat users, they see you every workday. One bad day isn't going to stop them from trusting that you know what you're doing. But in a transactional user base for the user only contacts the company once or twice. How you interact with each user, each time, is going to break or build that trust. Why is trust so important? Without it, the user could be difficult to work with and could even ignore your advice completely. Empathy and acknowledgment are big part of building trust. Without these, you'll find it difficult to connect with user. By seeing things from the user's perspective, you're more likely to find the solution that will help them specifically. This lets them know that you care and they'll be more likely to be engaged in the interaction. It's also important to follow through on your commitments and promises. If you tell someone you're going to follow up in one hour, then be sure to make it happen. If you don't, acknowledge the oversight and apologize, be sure that any claims you make can be backed up. Don't make something up to a user because you think it will help in the moment. Be honest with the user, even if you think they won't be happy about it and never be afraid to admit when you're wrong. This might be the hardest thing to do with the user, but you'll

find that your interactions are more successful this way. Being specific and empathetic with your apologies will give it more meaning. Remember, no one wakes up in the morning thinking, I'm going to be a jerk today. Well, you shouldn't sacrifice your self respect. Do your best to give the user the benefit of the doubt whenever possible.

# Anatomy of an Interaction

Now that we've covered the main customer service techniques, we're going to dive into some of the nitty-gritty by looking at the anatomy of an interaction. These apply to any channel of IT support, email, phone, chat, or in-person interactions. From the first moment you interact with someone, it's important to think about how you say, "Hello." Do you make sure to tell them your name? Do you incorporate information you know about them in your greeting? Do you ensure a positive tone? Are your spelling your grammar on point? These are all ways to create a really good start to the interaction. Some of these things are hard to achieve though. I'm a horrible speller, especially when I'm in a hurry. But knowing some of these trouble spots ahead of time will let you find ways to address them before the interaction. For me, I know that when I'm in a hurry, I need to recheck my spelling before hitting "Send". Have you ever heard the phrase 'first impressions last a lifetime'? Well, that might be a bit of an exaggeration. It touches on some truth. How you first interact with someone will influence how the rest of the interaction plays out. I'm not saying you have to be over the top, gushy and nice, that might have the opposite effect. Just be professional, acknowledge the user, and show them some respect. Taking the time to get the interaction off to a good start will make everything that comes after easier. Let's check out two scenarios to see how this plays out.

bad:

Hi, Gail. How are you doing?

Not great. It's been a bad day trying to get my phone fixed.

What's wrong with your phone?

good:

Hi, Gail. How are you today?

Not great. It's been a bad day trying to get my phone fixed.

Sorry to hear that. Let's see what we can do to turn that around.

Just by acknowledging their feelings and demonstrate your desire to help them, you started to build a relationship with the user. Of course, you have to keep up the good work throughout the interaction, but laying the groundwork is an important first step. I remember that while you might have 100 issues in the ticket queue that need your attention, this is the only one that matters to the user. Show them it's your priority too. The next critical step in an interaction is how you

respond to the user's questions. If they're taking the time to explain to you what happened, but you brush off their concerns by acting uninteresting, things are going to go south fast. Remember to integrate the information you've been given into your conversation. This will show you're actively listening and can help them feel more connected to the interaction. Let's look at an example. Which one of these greetings do you think is the most effective? Greeting 1, "Hi, Riori. How are you today? What can I help you with?" Or greeting number 2, "Hi, Riori. I hope you're having a good day despite your computer randomly turning off. Let's see what we can do to fix your issue." It's important to be transparent with the user. If they start asking you a bunch of questions while you're still troubleshooting, you can do two things. First option, you can ignore them because they're just talking out loud. Second option, you can pause and say something like, "I'd be happy to answer all of your questions, but I want to look up this one first. I've written them all down though, so I won't forget them." If you say that make sure to write the questions down. To really build a rapport, try to remember a personal fact they've mentioned and bring it up later. Maybe they mentioned they love cats, later while you're waiting for something to load, ask them if they have any cats or what their cat's name is. This shouldn't be forced. If you're not the type to engage in small talk, skip it. Now, you're getting to the point where you're ready to troubleshoot, just make sure you clarify the person's issue before you start to troubleshoot. If you don't, you might find yourself going down a rabbit hole. Imagine that a user tells you their computer can't get online. You look at the IP address, DNS configuration, and you start pinging things with no luck, everything seems fine. Then 20 minutes later, you find out their machine is online, they just can't access a particular page. Had you clarified this at the start, you would have saved yourself and the user 20 minutes. It seems simple to clarify the problem space, but it's often overlooked. Take this example. Thank you for calling. This is Leon. How can I help you? Hi, Leon. My computer isn't working. That doesn't sound fun. What do you mean by the computer isn't working? It won't connect to the internet. Do you have the corporate password for the wifi? No, why do I need that? In order to connect to the wifi in the building, you need to use the corporate password. Well, I'm not in the building. I'm at a cafe.

That's odd. Your computer seems to be different than what we normally use. Can I get your name so I can look up your configuration? Ling Chan. Do you work at this company? No, my friend gave me the number. Problem-solving is a super important aspect of an IT support interaction. Being an IT support specialist means that you could be asked about anything. Even though you aren't expected to know the answer off the top of your head, you should know where to start looking to find it. People are coming to you because they have a problem they can't fix themselves. Sometimes they feel self-conscious about asking for help. Be aware of how you probe for information. Pummeling the user with question after question will probably create frustration on both sides. Make sure to set contexts and explain why you're asking the question. Saying something simple like, "In order for me to figure out what's really going on, I need to ask you some question," can make all the difference. When you're in person, things are a lot easier because you can see each other and read each other's expressions. But you might find yourself too comfortable. Imagine you're asking for help with your phone. You wouldn't want the person helping you to just take it out of your hands without asking. Make sure you tell the user what you're doing before you do it. If you're supporting a user remotely and need them to run some commands, don't forget to tell them why you need them to execute the commands. There's no need to go into a ton of detail. Without some context, you could strain the trust you've built. Make sure that when you're asking these questions or asking the user to run a command, you're really listening to the response, those

little nuggets of information may help solve the issue. The last five minutes of the interaction will set the tone for how the user feels walking away from the interaction. Make sure to end on a positive note. You might have solved their issue, but if they don't feel it was resolved or they're unsure of the next steps, then they're going to walk away feeling like it was a poor solution. How do you make a good final impression? Simple, reiterate the resolution, state the next steps, then ask the user if they have any questions.

# How to Deal with Difficult Situations Part I

If you've ever worked in customer service, then you've dealt with difficult situations. The way you handle them in the food industry and tech roles are pretty similar. But before we dive into that, we're going to take a step back and talk about the science behind what's happening in these situations. Let's say someone's yelling at you, rather it's about a overcook steak or broken computer, your reaction to either will probably be similar. Your palms might be sweating, your hands might shake, or your mouth goes dry, tunnel vision might kick in. These are all normal physiological reactions that happen in response to a perceived threat. This is part of our biological makeup dating back to the time when people hunted for their food. When you're being chased by a cougar you needed your senses to be at high alert in order to keep yourself alive. Even though someone yelling at you isn't the same as the cougar attacking you, it can feel similar in the moment. Your brain is releasing a mix of chemicals and hormones to heighten your senses and keep you alert. Unfortunately, a side effect is that you may have trouble focusing on specific tasks. Not ideal. It's in times like these that you might go on autopilot where your body has a physical reaction and it's hard to focus. It's super important to recognize these moments and put a plan in place to reboot yourself out of the situation. Sometimes I feel this way when I'm teaching a class and someone is ignoring me. They just don't pay attention. I used to call them out on it, the fight response, but this never ended well. Sometimes they had a good reason for being on their phone and calling them out never made them listen more. Now when I feel myself in that situation, I noticed that my pulse increases. When I realize it's happening, I make sure to look around and focus on people who are more engaged in the lesson and make eye contact with them. Soon I feel my pulse slow down. Some of your experiences in IT support might trigger similar reactions. Once you've identified this reboot action, write it down. Remember, your brain isn't always working well in the heat of the moment, so it helps to have something to remind you what to do. It could be anything from squeezing a stress ball to looking away to taking a deep breath. The first couple of times, it may not work, so give it time. When you have a difficult situation, take a moment to think about what went wrong. How are you feeling? What was your reaction? Why did you raise your voice? After a while, it becomes second nature to catch yourself in de-escalate situation. To really hold yourself accountable, tell a co worker what you're trying to do. Give them a recap of the interaction and ask them for their feedback on the interaction. You might get some great tips. But here's the bad news. Things aren't over once you get yourself back on track. That's when the hard work starts. Every situation is different and you'll learn the best strategies from experience and peer feedback. To get you started, I'll run through some tried and true techniques. Keep in mind that it's fine if you don't get these right the first time. It takes practice, reflection, and feedback to really nail it, so don't give up. The hardest and arguably the best technique is to identify where the interaction went wrong in the moment and redirect the conversation. This is really tough because it means remaining calm enough to objectively look at the interaction and understand what could have caused it to escalate. At first, try this once the interaction is over.



You started your chat with the user and it's really pleasant and problem-solving is happening, then suddenly the tone turns dark. What caused it? Where is the misstep? Looking back, you might notice that the user didn't understand the question about what happens when he tries to sync his phone and the tech just kept repeating it. The user gets annoyed and then starts typing in all caps, a clear sign they're irritated. In this case, the cause seems obvious. If the user didn't understand the question, then they probably got frustrated when the same question was asked over and over. If the IT support specialist had noticed this, they could have reframed the question and broken it down further.

# How to Deal with Difficult Situations Part II

Another cause of frustration in user support interactions is when people talk over each other. This usually happens over the phone. Since there's sometimes delay, but it can happen in person too. Typically it leads to people talking louder and sometimes ends up feeling like you're yelling at each other. You've probably been in a situation like this with your friends or family. Everyone wants to talk and the person with the loudest voice wins.

How can I help you today?

>> My laptop isn't working. I need a new one, I have meetings I need to go to.

>> I can certainly look into this and see what we can do to fix it

>> But I want to set context that our policy is to only replace laptops if all other options have been exhausted.

>> I don't need you to go snooping around my computer. Just give me a new one. Gale, I'd love to do that for you, but.

>> That's ridiculous, I'm a director. I should get a new one. I don't have time for this.

>> I completely understand the urgency of the situation. Why don't you let me take a look.

>> That's why I came. You need to fix it.

It's important to try and identify why this is happening. So you can course correct. In this case, you can simply stop talking to calm things down, then pause for about five or 10 seconds to make sure they're done talking and start again. This might take a few tries before the user realizes what they're doing and gives you time to talk. Use that time to calm down and really listen to what the user is saying. Ask yourself, why are they talking over me? What am I missing then in those 5-10 seconds, collect yourself and think about what you want to say.

>> How can I help you today?

>> My laptop isn't working. I need a new one, I have meetings I need to go to.

>> I can certainly look into this and see what we can do to fix it. But I want to set context that our policy is to only replace laptops. If all other options have been exhausted.

>> I don't need you to go snooping around my computer. Just give me a new one.

>> Gale, I'd love to do that for you, but I.

>> That's ridiculous. I'm a director, I should be able to get a new laptop. I have no time for this.

>> I completely understand. Can you let me have five minutes to do a quick triage and then we can discuss next steps?

If the user is crossing the line and making you feel uncomfortable ignoring it can feel like the easiest solution. It isn't, remember that if you do the next person they interact with will be treated the same way and that's not okay. It's also easy to say that the person being attacked needs to stand up for themselves, but in situations like this one that's really hard, ideally by standards would call out this behavior in a calm way. It's also important that you escalate these issues to the appropriate channel. Whether that's your manager, the human resources department, whomever. Disclaimer, I love being in the IT support field and I don't want to dwell on the negative, but I do want to prepare you for what you might encounter. So let me throw another tough scenario at you. You might find that a user skims over what you wrote or doesn't listen to the full instructions you present before taking action. When this happens, be patient. You've likely been on the other end of this before when you ignored instructions? Why were you overwhelmed with information? Were you in a hurry? Maybe you need reading glasses. Whatever the case might be, the best tactic is to break these steps down into smaller, more digestible pieces for the user. If you sent them an article that they didn't finish reading, ask where specifically in the documentation they're having issues. So that you don't have to bore them with the parts they already know. Sometimes you come across someone wanting to bend a policy or push back on an established process. Take this as a sign to look deeper into the situation. Is it really a company policy or just a common way of doing things? If it is a policy, is there documentation of it? You can reference that to the user. If not offer to follow up to get a definitive answer. You might be surprised what you find. The takeaway here is that it's important to try to see things from other people's point of view. In that moment when you're feeling riled up and frustrated, take a minute to see the situation from the other person's perspective. If you were them, how would you be feeling? What would make you feel better? If you can train yourself to see things from another's perspective, you're on your way to turning things around.