



# Agile, Fast Response

**CASIC studies require** that interviewer questions and equipment issues be answered **as quickly as possible**. Survey management and operations are enhanced by the provision of **fast, reliable, and efficient help desk support services.**



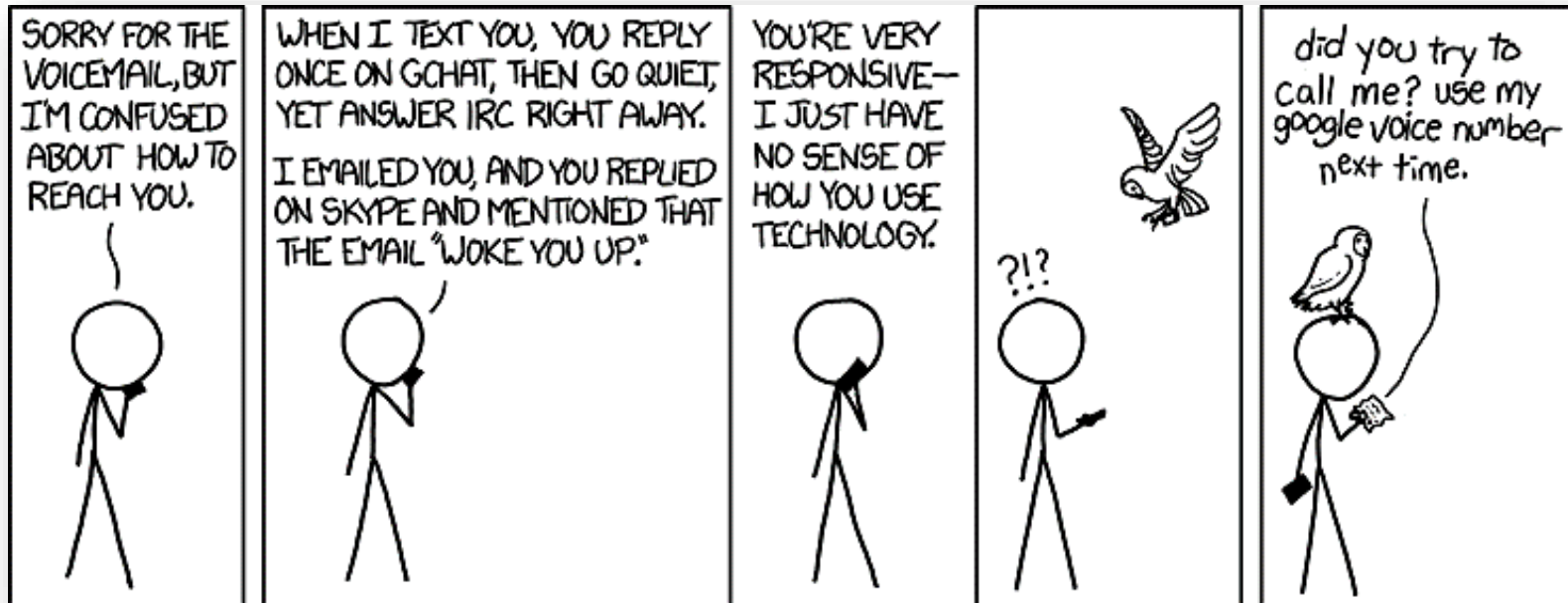
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**For large field interviewer deployments** we use a support desk solution that **integrates multiple services** using a cloud based system. Many features offered by cloud-based VoIP systems have proven useful in addition to a **comprehensive training plan.**

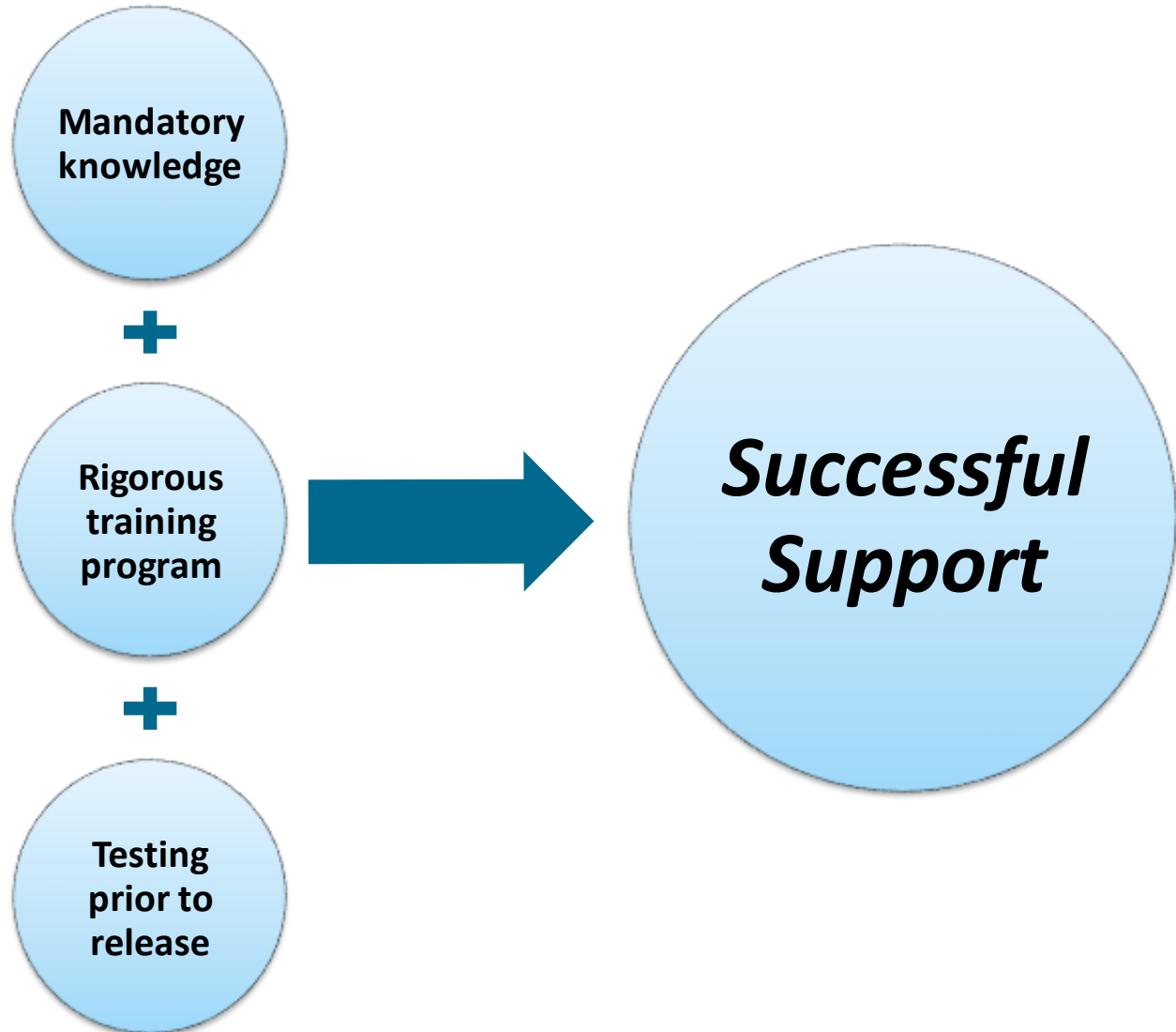
# Multi-Channel Communication



Help desk agents take live phone, live chat, voice mail, and email requests, and need expertise in multiple areas of the project and solution technology.



# What Makes a Help Desk “Click”



# Testing



# Tier 1 Leaders

A core set of staff start by testing the survey or assessment on field equipment **prior to release** of the system.

This integration of testing and support greatly aids in the **depth of knowledge** of the agents.

The best of those core staff are appointed Task Advisors to the larger group of agents that support the production release.



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# Help Desk Agent Training

The help desk team begins with two days of general project training, followed by **three days of hands-on training** for the following:

- **Troubleshooting survey issues**
  - Logging in (password resets, multiple login modes, etc.)
  - Functionality and purpose
  - User types (Admin vs. monitor vs. parent or youth versions, etc.)
  - Statuses and other capabilities of administrative mode
- **Practicing surveys and troubleshooting possible errors**
  - How to pause, advance
  - Unfreeze
- **Following ticketing system guidelines, for example**
  - Adding missing Requester (people calling in from an unknown number)
  - Updating Subjects with call details
  - Call details with actions taken and further expectations
  - Dashboard – unassigned tickets
- **Responding to email and voicemail**



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- **Conducting chat sessions**
- **Supporting transmission tasks**
- **Enlisting Tier 2 support**
  - Task Administrators fulfil “Tier 1.5” role
  - Supervisor approval required
- **Assisting with and performing field updates**
- **Conducting mock administration of survey or assessment for practice**
  - Location setup
  - Locations with multiple concurrent sessions
- **Correctly routing non-help desk calls (payroll questions, FedEx, etc.)**
- **Learning what info feeds between systems**
- **Troubleshooting multiple types of equipment**
  - Laptops and tablets
  - Printers and pelican cases
  - MiFis and routers
- **Connecting and troubleshooting a network**
- **Replacing accessories:** batteries, styluses, and power cords

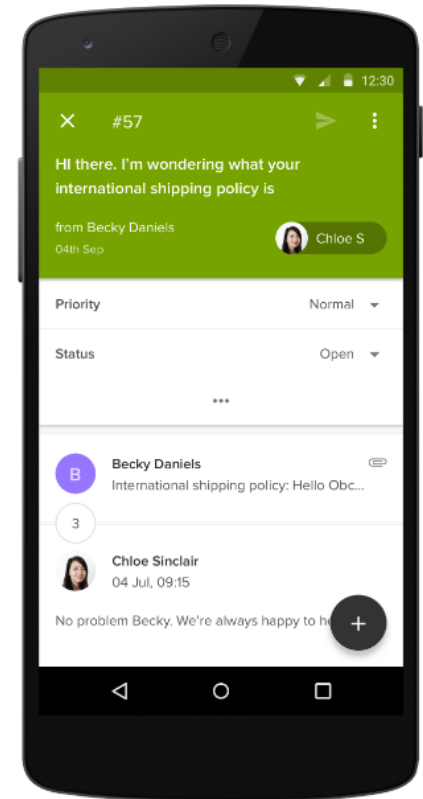
## ■ Equipment Shipping

- Instructing callers how to return equipment
- Printing FedEx air bills
- Packing boxes and taking items to mail room
- Completing transfer work/reassignment
- Tracking packages
- Rerouting shipments

## ■ Care and maintenance of equipment

## ■ Troubleshooting data transmission concerns

## ■ Transmission speed and workarounds

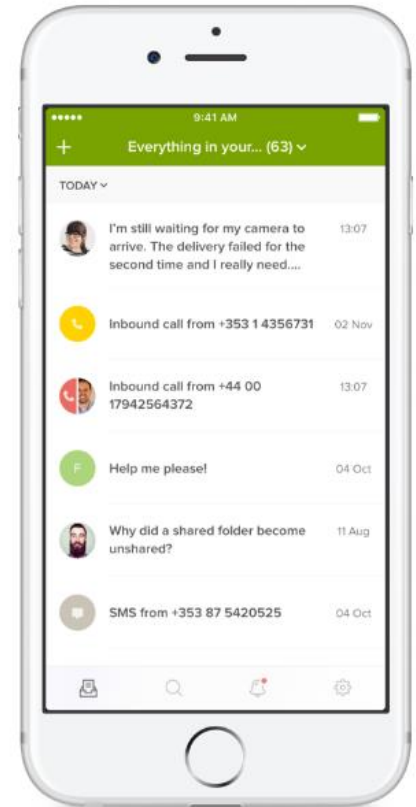


Training is followed by **constant practice** (when not taking calls), listening to recorded calls from other agents with talking points provided by trainer(s), shadowing, **quizzes and games** to review information, and role-play.

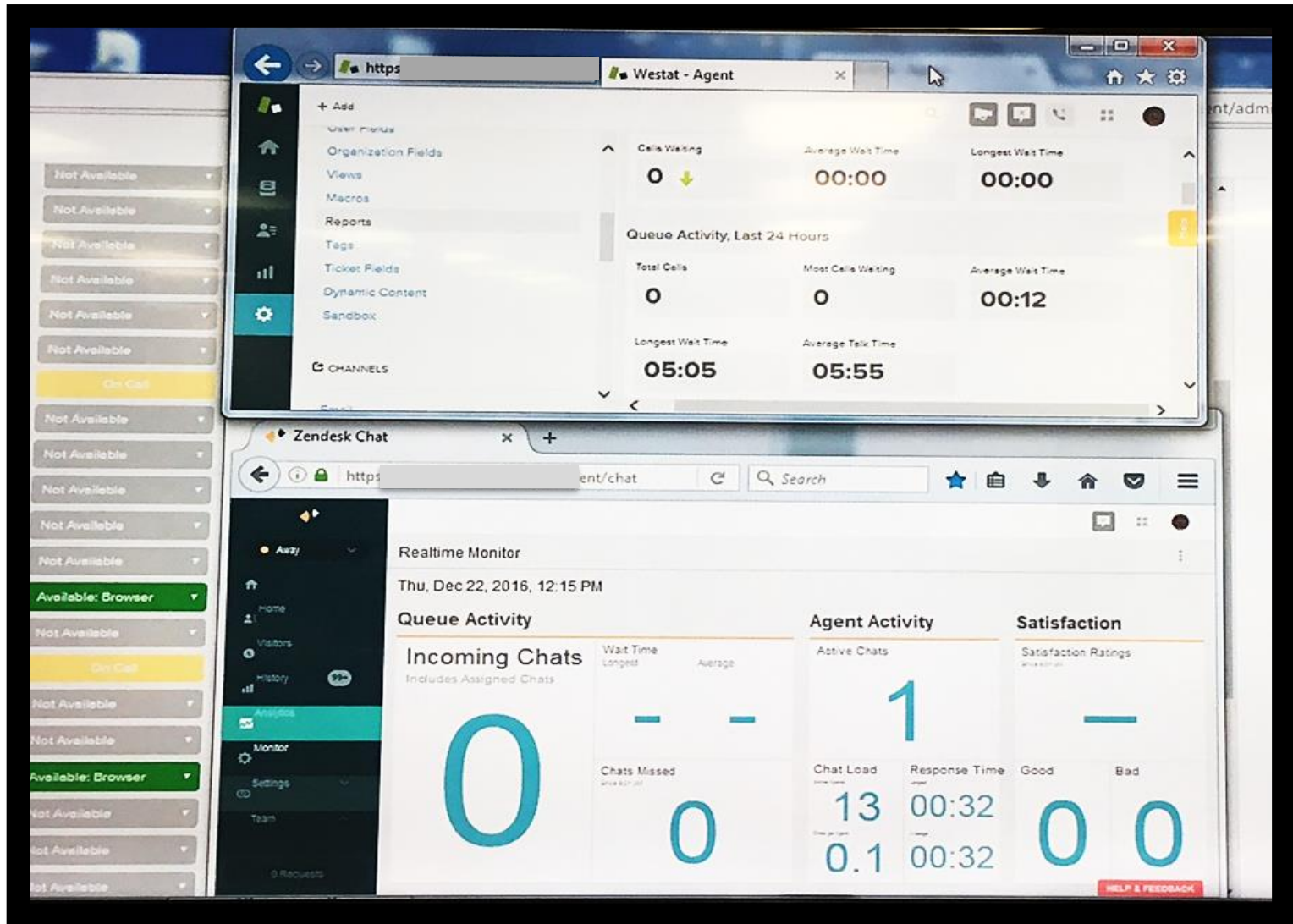


# 5 Favorite Features

- Caller contact information is seamlessly imported into the ticketing system so the implementation of the system is **transparent to the field staff.**
- **Automated processes** speed up ticket creation, call routing, triage questions, and more. (For example, text macros.)
- **Web-based system** allows agents to work remotely.
- Supervisors **remotely monitor activity and assign tickets** via mobile apps.
- **A dashboard can be viewed by anyone** via PC, tablet, and on a room display monitor.










The dashboard shows all of the support details including the order of call assignments to the agents.



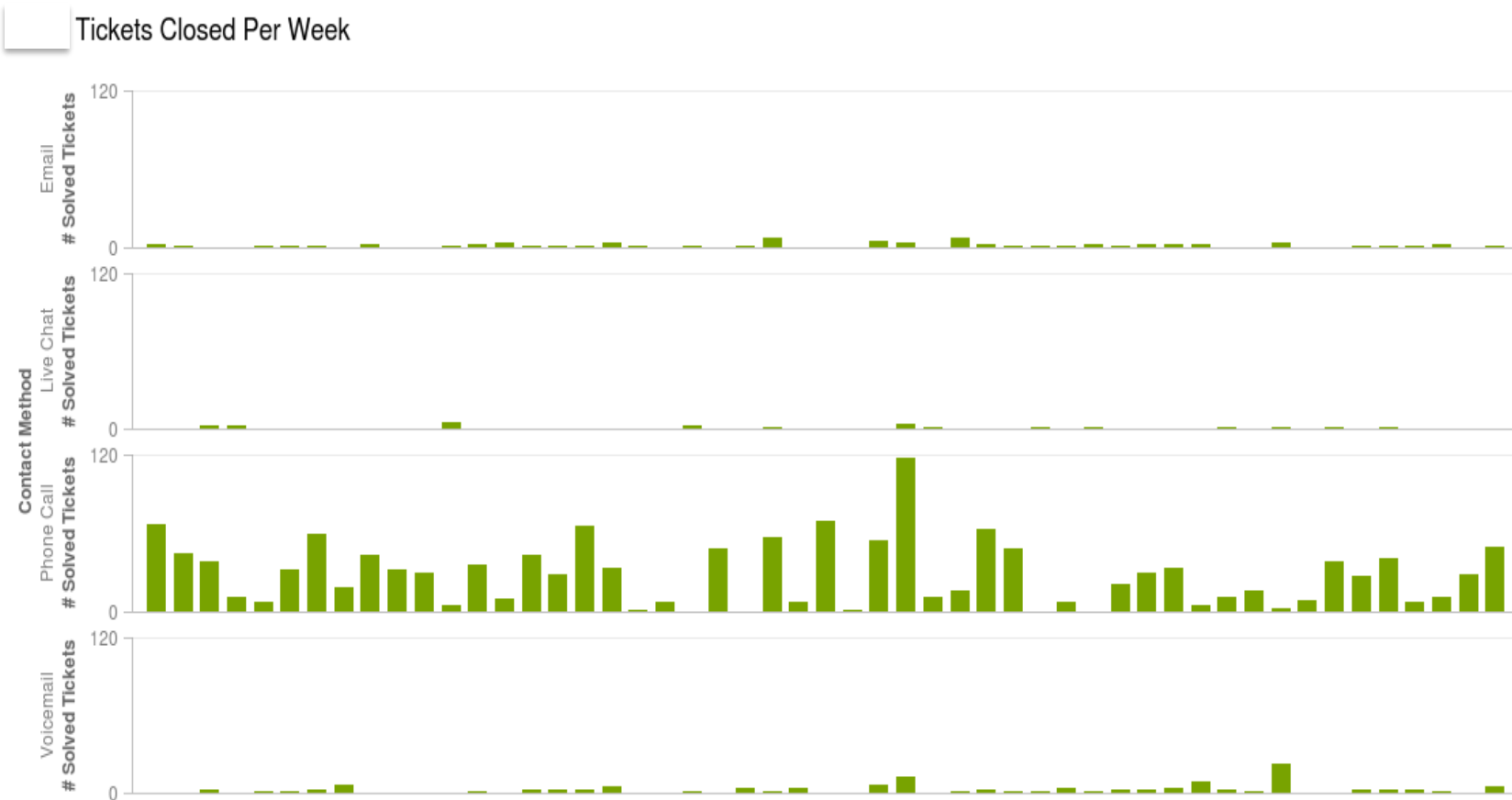
# Evaluating Agent Performance

Supervisors can monitor agents to provide input and improve training, and agent availability statistics are beneficial for staff scheduling, coaching and job performance discussions.

Agent activity All groups (24) ▾ Apr 3, 12:00 am → 03:48 pm

Agent	Status	Total online time	Time available	Total talk time	Total wrap up time	Calls accepted
 Abdul K	<span>● Unavailable ▾</span>	04:18:50	04:13:39	00:03:52	00:00:00	3
 Douglas L	<span>● Unavailable ▾</span>	01:24:59	01:24:59	00:00:00	00:00:00	0
 Johnee H	<span>● Unavailable ▾</span>	04:25:00	04:21:26	00:03:33	00:00:00	1
 Lauren R	<span>● Unavailable ▾</span>	00:00:00	00:00:00	00:00:00	00:00:00	0
 Linda M	<span>● Unavailable ▾</span>	00:00:00	00:00:00	00:00:00	00:00:00	0
 Michael L	<span>● Available: Brows ▾</span>	06:27:33	06:24:02	00:04:34	00:00:00	3
 Patricia K	<span>● Available: Brows ▾</span>	06:23:39	06:19:33	00:04:06	00:00:00	2

# Detailed Reporting



# Customer Service

**Callers receive automatic email notifications at pre-defined triggers, including:**

- After the call, summarizing the main issue.
- After any update to the ticket.
- When and how the issue was resolved.
- A satisfaction survey 24 hours after the call.

Supervisors can track all of the survey responses to improve customer support by following up with the caller if necessary, and using the history. Audio recordings of the ticket are available for further training.

# Summary



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There are many help desk support tools on the market, and we have found that using a VoIP cloud-based call center system with well-trained technical agents provides the best solution.