Lessons Learned

Best Practices of the TSC

Ground Rules

1. All communication with a customer goes through RT - no personal emails!
2. Any interaction with a customer gets recorded in RT

What to do when customers prefer email?

1. Gently nudge them by copying their message into an RT ticket
2. If the habit continues, send a canned response explaining why we use RT

Example: *“To ensure that your request is able to be received by the appropriate group, and also for logging purposes, DoIT recommends that all support requests be submitted through our RT ticketing system rather than personal email. You can submit a request online by going to my.umbc.edu/help, or by phone by calling (410) 455-3838.*

For additional support resources, we recommend visiting our FAQs at umbc.edu/faq”

Responding to Customers

FAQs are a preferred solution

Using an FAQ:

(1) Saves staff member from having to type common answers
(2) Promotes future user self-support - we hope
(3) Allows for student staff to provide detailed answers to questions (regardless of how long they've been working for us)

Other Tips for Responding to Customers

- If we believe we've answered a customer's request, resolve the ticket and give them the option to reopen rather than leaving the request open and asking them to confirm whether our solution worked - most often, if it works, they won't reply

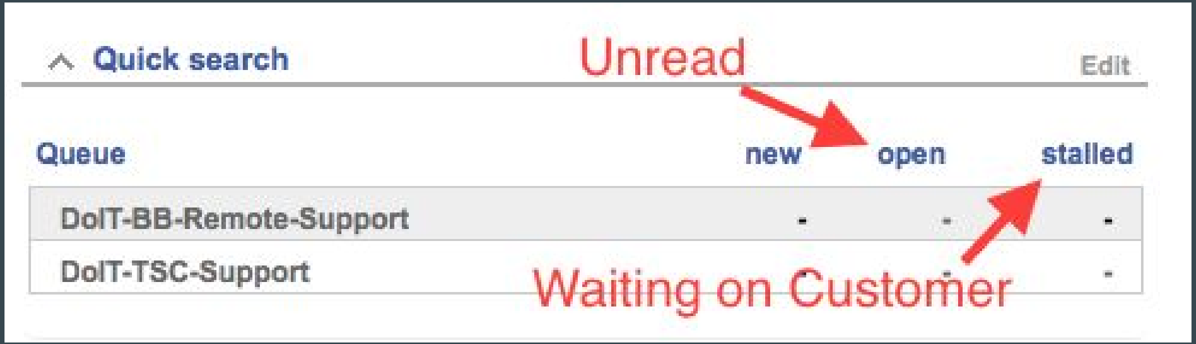
- If waiting on customer for more information, reach out to customer 3x (once each business day) before resolving request.
    - This prevents stale tickets from accumulating in the queue.
    - Do include in the resolution message that the customer can always reply to the message to reopen the request if it is still an issue. Some customers respond to this "final" message with a renewed sense of urgency.

Using RT Effectively

Utilize Ticket Statuses for Better Ticket Management

Set a ticket's status to stalled when waiting for a customer response; when they reply, the request will show as open, which we use like an "unread" notification

This is incredibly useful in the "Quick Search" field of RT:



Record Everything in the Ticket

- Log any interaction with a request in detail so that support staff can convey it to the customer.
- Explain *how* a ticket was resolved in its resolution so that others can benefit:
    - Another employee can learn how he/she could resolve the issue in the future.
    - Another employee can convey what was done to the customer.

CC’ing Users on a Ticket

- Avoid arbitrarily CC’ing users on tickets. Follow best practices when CC’ing a user to avoid email spam.

  Examples for good CC’s:

  - Letting an instructor know we’ve directed their student to contact him/her regarding an issue with his/her course
  - Including a coworker or supervisor who’s requested to be included on a ticket
  - Including a customer’s alternate email address should he/she not be able to access email at their UMBC address

Moving Tickets to Other Queues

- If moving a ticket back to a group, include a comment to explain *why* the ticket is being moved back, as well as any necessary information that needs to be collected.
    - This is also helpful when moving a ticket to an unrelated group! (e.g. Admissions to DoIT)

Emphasize Agreed Upon Procedures

Following standard procedures help to manage customer expectations; deviating from them to provide “special” service on a per customer/per situation basis leads to customers that favor one specific employee over others (not scalable)/expect special service in the future.

Questions?