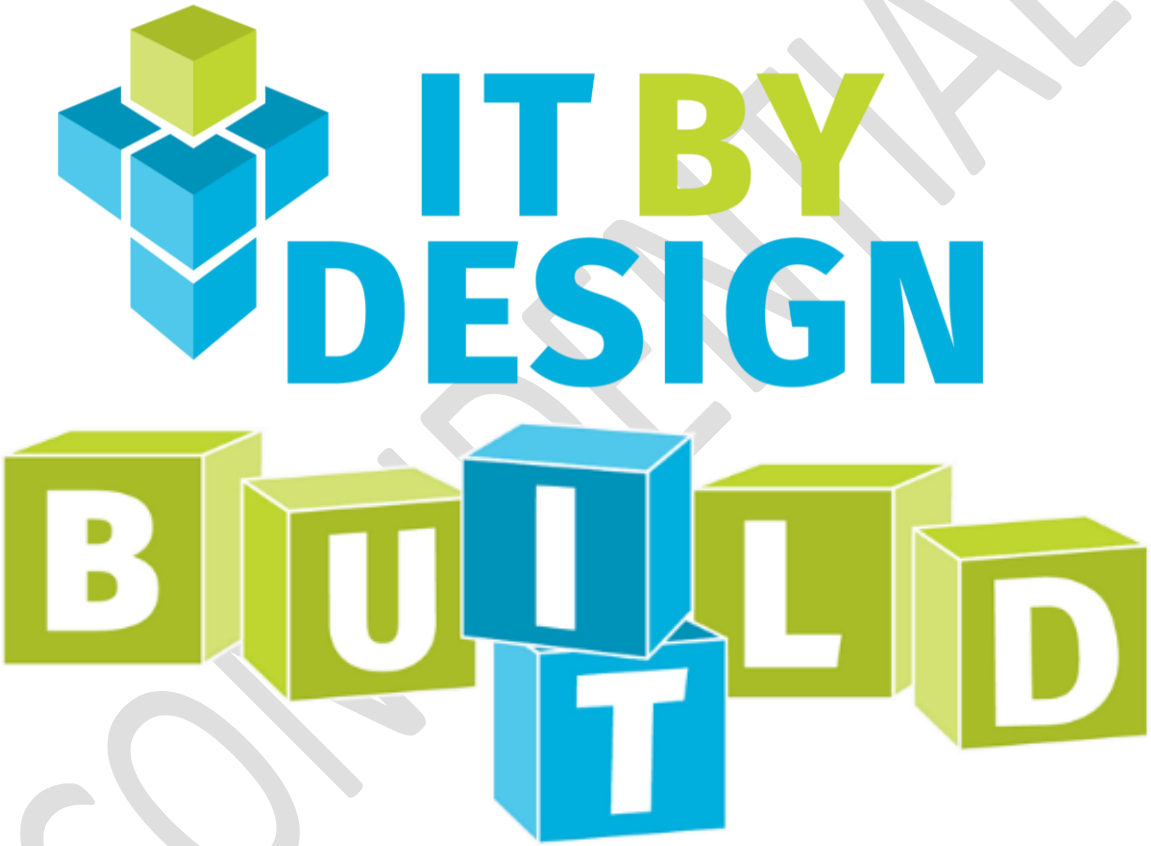
Ticket Quality SOP



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Section Scoring/ Questions/ Examples

Section	Questions	Examples
Call Opening (Dispatcher or Engineer) and Empathy & Assurance (4 Points)	1.1 Did the dispatcher or engineer provide expected Greeting -" Thank you for calling the Business Help Desk"?	Yes: Thank You for contacting the Business Help Desk this is Michael, how may I help you? No: Michael here, how may I help you?
	1.2 Did the Engineer display Assurance and Empathy (wherever required), letting the customer know the importance of their issue?	Empathy is the capacity to understand or feel what another person is experiencing from within their frame of reference, i.e., the capacity to place oneself in another's position. Yes: “I can understand why you would feel that way about your issue, here is what I am going to do to help resolve it…” No: “So you are unable to long on to your pc this morning, can I have you first name?

Section	Questions	Examples
Documentation (18 Points)	2.1 Was the Company properly documented?	Yes: Chose "Songs Music Publishing” No: Left the ticket under Catch All or IT by Design
	2.2 Was the Contact properly documented with the correct call back number, email address, site, and address to ensure it reflects the person who is affected by this issue	Yes: choose the correct user using the Contact picker No: left it as the default contact No: left it as the person submitting the contact on behalf of someone else No: left it at the wrong location No: left a field blank
	2.3 Was the correct Team chosen?	Yes: Remote team\Onsite team No: choosing the wrong team for the ticket
	2.4 Was the correct board chosen for the ticket?	Yes: Chose the Helpdesk Professional Services board because the ticket can be handled remotely and is related to an IMS help desk customer No: The ticket was on the Helpdesk Professional Services board, but required an onsite visit and should’ve been moved to the Onsite Professional Services board No: The ticket was on the Helpdesk Professional Services board, but was related to an internal issue and should’ve been put on the Operations board No: The ticket was on the Helpdesk Professional Services board, but was for a purchase request and should’ve been moved to the Purchasing board
	2.5 Was the machine configuration chosen?	Yes: The correct machine configuration was chosen No: The wrong machine configuration was chosen No: No machine configuration was chosen
	2.6 Was the correct agreement chosen?	Yes: The Remote agreement was chosen for a remote ticket No: No agreement was selected No: The Remote agreement was chosen for an onsite ticket
	2.7 Was the correct due date chosen to reflect the client’s expectation?	Yes: The due date reflects the date that the customer expects this to be resolved as per the Service Level Agreement No: The incorrect due date was chosen No: No due date was chosen

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<table>
<tr><td></td><td>2.8 Was the correct level of Impact/Urgency chosen?</td><td>Yes: it was correctly chosen based on following table:
<table><tr><th>Severity</th><th>Description</th></tr><tr><td>Low</td><td>One user or a small group of users is affected</td></tr><tr><td>Medium</td><td>Department(s) or large group of users are affected</td></tr><tr><td>High</td><td>The whole company is affected</td></tr></table>
<table><tr><th>Impact</th><th>Description</th></tr><tr><td>Low</td><td>More of an irritation than a stoppage</td></tr><tr><td>Medium</td><td>Business is degraded, but there is a reasonable workaround</td></tr><tr><td>High</td><td>Critical - Major business processes are stopped</td></tr></table></td></tr>
<tr><td></td><td>2.9 Does the “Summary” provide a concise recap of the issue?</td><td>Yes: Chelsea is receiving bounce back notification from certain addresses

No: Chelsea called in (No further documentation provided)
No: Took call about an issue</td></tr>
<tr><td></td><td>2.10 Does the “Initial Description” accurately describe the issue?</td><td>Yes: Clear and proper synoptic documentation of: Problem; Cause; Steps taken to resolve.

No: The initial description was undescriptive
No: The initial description was left blank</td></tr>
<tr><td></td><td>2.11 Did the engineer use spell check?</td><td>Yes: Spelling and grammar is correct, and the email looks well composed

No: There are spelling errors and/or incorrect spelling of the customer’s name</td></tr>
<tr><td></td><td>2.12 Did the engineer use the steps taken: / next steps: format?</td><td>Yes: Dear customer,
Here are the steps I’ve taken to resolve your ticket:

Here are the next steps on this ticket:

No: I’ve resolved the issue by fixing your computer</td></tr>
<tr><td></td><td>2.13 Was a recap of the steps taken to resolve the ticket shown in the “Resolution” tab of the ticket?</td><td>Yes: Dear customer,
As discussed, your issue is resolved. Here is what we did to resolve your issue:

No: ticket is closed
No: resolution is blank</td></tr>
</table>

Section	Questions	Examples
Issue Identification (6 Points)	3.1 Was the correct "Service Type" chosen?	Yes: The service type and sub-type accurately depict what the issue pertains to No: The service type and sub-type were left at default No: The service type and sub-type were left blank No: The service type and sub-type did not accurately reflect the type of issue the customer experienced
	3.2 Did the Engineer ask pertinent probing questions to determine customers need(s)/Identify the issue? Did the agent determine how many users were affected to ascertain the severity and impact?	Caller is unable to print. – Ask the appropriate questions. Yes: Are you receiving an error message? May I please have that message? Yes: Are you the only one having this issue? Yes: Is everyone in the office unable to print to printer abc or is it just you? Yes: the connections to PC and Printer secured? No: Have you restarted your PC today? No: Have you checked your control panel? No: “Is the sky blue where you are?”

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Section	Questions	Examples
Technical Skills / Resolution (11 Points)	4.1 Did the Engineer establish a remote connection user/server (using correct method)?	Yes: Hearing the Engineer ask the caller for permission to remote in and advise the user that they will need to click “Allow”. No: Engineers did not ask if they could remote in to solve problem/clarify the caller issue(s).
	4.2 Did the Engineer follow the resolution process as detailed in K-base / Knowledgebase (i.e. escalation, troubleshooting etc.)?	Yes: Active Directory – Engineer followed the designated steps in the template associated with this issue. Used available resources properly to find solution. No: Engineer escalated the ticket Client Services for resolution without checking the knowledgebase, wiki, or other designated resources.
	4.3 If issue requires follow up to resolve, did the Engineer provide correct “next step” / set expectations appropriately?	*Caller has an issue that has to be escalated per procedure or you have exhausted all troubleshooting steps.* Yes: The caller is informed that the issue will be escalated, all of the callers and complete information has been captured (i.e. Callers contact information and equipment Make, Model and Serial #) Advise caller that you are escalating to another department, and do not have an approximate time however they work on first come first serve basis. The ticket is documented to reflect the method used to communicate with the customer. (Call/email) No: The caller is given the next steps and the callers contact information has been documented and verified however the caller’s PC Make, Model and Serial # has not been captured in the ticket. No: The ticket was not closed or properly documented to indicate that the steps above were followed
	4.4 Did the Engineer effectively Resolve and Confirm Resolution of the issue while summarizing the steps performed?	Yes: The dialogue and ticket notes will indicate whether the caller’s issue has been resolved. Effectiveness will be measured by; questions asked, the order they were asked or if the determining questions were asked at all. No: If the Engineer does not ask follow-up questions based on the caller’s issue or makes assumptions then you would score a “no” in this section.
	4.5 Did the Engineer appropriately Close the Ticket?	Yes: Issue resolved, and ticket is closed by the Engineer. No: Ticket was left open when issue was resolved.

Section	Questions	Examples
Professionalism (25 Points)	5.1 Did the Engineer keep the customer Appraised /Engaged /Informed of Progress, throughout the call?	Yes: The customer was given updates at least once a day and they understood when the next follow up would be done No: The engineer didn’t provide daily updates No: The customer had to ask for as status update
	5.2 Did the Engineer follow correct Hold procedure and courtesies?	While placing the customer on Hold, check for the below mentioned: 1. Seek customer’s permission for placing on hold. 2. Give reason for placing the call on Hold. 3. Provide estimated time of Hold. If taking more than expected time, then refresh the customer after the estimated time is expired. 4. Thank the customer for being patient and staying on hold. Yes: I will be taking remote of your system and this may take while for me to do so. Would it be fine if I can place the call on Hold for 2 minutes? No: Let me check, Hold on.
	5.3 Did the Engineer display and maintain a Professional and Positive Tone, Volume and Pace throughout the interaction?	Yes: If Engineer matches tone, ROS and enthusiasm or demeanor with client No: Engineer fails to match tone, ROS and enthusiasm or demeanor of client

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	5.4 Did the Engineer exhibit Effective Active Listening Skills and allow the Customer to speak without Interruption or talking over them?	Active Listening refers to that the listener fully concentrates, understand, respond and then remember what is being said without interrupting the caller or talking over them. Yes: 1. Brief verbal affirmations like “I see,” “I know,” “Sure,” “Thank you,” or “I Understand.” 2. Open ended questions (Clarifying Questions). 3. Reflective Question (Echoing) 4. Paraphrasing 5. Summarizing
	5.5 Did the Engineer use Jargons and Negative Words/Phrases that could have confused the client over the Call or in the Email?	Engineer must avoid using Industry phrases and acronyms. No: Let me take the remote session through LabTech.
	5.6 Did the Engineer provide service to the customer/client recognizing and adapting the customer's unique Personality, Style and Manner? (Knowledge and Information pitched at right level)	Yes: If the Engineer reciprocates casual conversation with equal enthusiasm and interest like the client displayed. No: If the Engineer ignores an opportunity to build rapport by reciprocating to casual conversation
	5.7 Did the Engineer try to build Rapport whenever the client gave an opportunity for casual conversation?	Rapport is a state of harmonious understanding with another individual or group that enables greater and easier communication. Rapport is getting on well with another person, or group of people, by having things in common, this makes the communication process easier and usually more effective.
	5.8 Did the Engineer talk with a Smile and was Courteous, Polite, Professional and Confident throughout the interaction?	Yes: If the Engineer was polite and spoke with a smile No: If the Engineer was courteous and didn’t sound confident and smiling
	5.9 Did the Engineer use the Customer’s Name in the correct context more than once during the entirety of the call?	Yes: Using the name when creating the ticket and at closing i.e. Thank You Dave, I’ve got all your information now let’s reset your password. No: Referencing the name during the call is not using the name i.e. “Your name is Dave Johnson?”
	5.10 Did the Engineer treat the call like a warm transfer when the dispatcher transferred the call?	Engineer must answer the call as warm transfer by addressing the customer with their name and talking about the issue they got to know from the Dispatcher. Engineer should not ask for the customer’s name, company details again as this information is already taken by the Dispatcher and asking the same things again will irate the customer.

Section	Questions	Examples
Efficiency (8 Points)	6.1 Did the Engineer efficiently use time?	Yes: The Engineer began the call with opening a ticket, and then started troubleshooting the client’s issue. No: The Engineer started troubleshooting right away, and then once the issue was resolved tried to open a ticket. Call took a personal or unrelated turn and Engineer did not steer the conversation back to business at hand.
	6.2 Did the Engineer educate the customer on applicable resolutions steps for future self-resolution?	Yes: Engineer resolved the customer’s issue by resetting his password and then informed the caller that if he should need his password reset in the future he could use the intranet and give the instructions on how to do so. No: Engineer resolved the caller’s issue and does not mention / educate the user on how he can resolve the issue using the intranet in the future.
	6.3 Did the Engineer follow up within 15 minutes of customer reply?	Yes: Following up with the client as they replied to a ticket No: Looking at the ticket, pushing it back to another time slot

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	6.4 Did the Engineer resolve the ticket with in the SLA?	

Section	Questions	Examples
Communication Skills (24 Points)	7.1 Did the Engineer's Pronunciation of Names and other important words hamper understanding for the Client?	Yes: If the Engineer pronounced words in such a way that he was easily understandable No: if there were situations where the client couldn't understand what the Engineer was saying
	7.2 Did the Engineer use appropriate Grammatical structures during the interaction?	Yes: Spelling errors, Punctuations, Vocabulary, No: Wrong spelling, wrong punctuations, miss used vocabulary
	7.3 Did the Engineer display Effective Verbal Communication? (Sound Mixes, Foghorns, Filled Pauses, Mumbling, Fumbling, Rushing, Swallowing Words, Trailing Off phrases, Inappropriate Accent)	Yes: Was able to effectively able to speak over the phone Yes: He/She was speaking load and clear to the client Yes: Was the client understanding and kept on track? No: The engineer was not speaking clearly No: The engineer was not using proper wording No: The engineer was failing comprehend
	7.4 Was the Engineer Fluent and show Clarity of Speech throughout the interaction?	Yes: If the Engineer didn't fumble, stammer or have too many fog horns or fillers No: If the engineer fumbles, stammers or has frequent fog horns and fillers
	7.5 Did the Engineer appropriately Acknowledge/Respond to customer's query/responses.	Yes: Did the Engineer use active listening techniques to display understanding. No: If the engineer failed to acknowledge and convey understanding to the client
	7.6 Did the Engineer display Effective Written Communication?	Yes: The engineer displayed proper writing skills Yes: Proper sentence structure Yes: Proper wording No: Wrong sentence building No: Wording does not make sense/unclear
	7.7 Did the Engineer display Effective Sentence Structure?	Yes: Formed sentences are well put together Yes: Proper usage of correct/appropriate vocabulary Yes: Is the sentence format neat and organized. No: Wrong words put together No: Wrong use of wording and punctuations No: Sentence does not make sense

Section	Questions	Examples
Additional Assistance and Call Closing (4 Points)	8.1 Did the Engineer ask for Additional Assistance and took Permission to Close the Ticket.	Yes: Is there anything else I can help you with? Yes: May I go ahead and Close the Ticket? No: Closing the call without asking for additional assistance and permission to close the ticket.
	8.2 Did the Engineer provide expected Closing over the call and in the email?	Yes: Thank you for choosing Business Help Desk. Is there anything else I can help you with today? No: OK, call us any time. No: Ok fixed it! You're all set Bye

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Section	Questions	Examples
Efficiency (8 Points)	9.1 If issue is unresolved, did the Engineer follow required escalation path and provide accurate documentation in escalated ticket?	Yes: Engineer unable to resolve the issue and had to escalate the ticket. The Incident # or SD# and an explanation of the next steps were given to the caller. Ticket was appropriately documented with the next steps, escalated as needed according to the Connect Wise flow or the documentation in the K-Base other tools. No: Engineer escalated a ticket but did not follow proper flow according to the k-base Example: Engineer was to call and warm hand off to another department and this step was not done.
	9.2 Did the Engineer refrain from unprofessional behavior during the call? [Including but not limited to: negative comments regarding the Partner/Vendor/Other Service Desk Engineer, Argumentative/ Confrontational behaviors, condescending tone, Raising of voice, etc.]	Yes: Engineer handled the call without obvious instances of unprofessional behavior. No: Engineer made a negative comment about a previous Engineer," Yeah the person that previously handled your issue is clueless." No: Engineer made a negative comment about one of our other teams, "Unfortunately I cannot help you with this issue because the information that Information Security provides us is so out of date ". No: Engineers raised their voice or expresses frustration with a caller, "I AM TRYING TO HELP YOU—But you are not listening to me."
	9.3 If a major change was made to the infrastructure, was the change control process followed?	Yes: a change was made to the firewall/server/switches/active directory/server operating system/etc. only after approval from a senior engineer and it is documented in the ticket No: changes were made without prior approval from a senior engineer
	9.4 Did the engineer ensure the work they performed was part of the managed services scope of work?	Yes: they consulted a manager if they were in doubt No: they performed lengthy work that should have been a project without a manager's approval No: they performed work on an unmanaged machine without a manager's approval
	9.5 If any network password was changed/modified, was it documented in Bizdox or LabTech?	Yes: the information was documented in Bizdox and LabTech No: the information was not documented
	9.6 Did the Engineer share confidential information/password over email?	Yes: The engineer shared confidential information/password over email? No: The engineer did not share any information
	9.7 Did the Engineer take Remote Session of customer's machine without Permission?	Yes: May I go ahead and take control of your machine? No: Directly jumping on the customer's machine and informing the customer, "I have taken control of your machine".

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