

One-hour Workshop Session Descriptions ***Kristin Robertson, KR Consulting, Inc.***

Kristin Robertson, author of [Spectacular Support Centers](#), can provide a one-hour, highly informative workshop for your chapter meeting or conference session. Here are the topics from which you can choose.

Topic One: **The Seven Disciplines of Spectacular (Smaller) Support Centers**

What makes a support center spectacular? Support centers of any size must succeed in several major areas to be spectacular, and they generally follow seven disciplines. How can small to mid-sized support centers be spectacular, when they have fewer resources (including people, money and tools) with which to run their operations? Clever managers of smaller support centers will adapt the operational disciplines used by larger support centers to make them appropriate for their size.

In this one-hour workshop, we will discuss the seven important disciplines of a smaller support center, including:

1. *Strategic planning*
If you don't know where you're going, any road will take you! Even smaller support centers must create strategic roadmaps for the future of the support center.
2. *Contact handling methods and escalation procedures*
All support centers should periodically examine the way they handle incoming customer support requests, and ensure they are efficient, customer friendly and well documented.
3. *Knowledge management*
Many smaller support centers cannot afford a powerful knowledge management tool. However, the success of a knowledge management program is based mainly on the process employed, not the tool. Learn how to adapt the principles of knowledge sharing for use in a smaller support center.
4. *Metrics and reporting*
Have you identified your support center's Key Performance Indicators? Do you regularly report operational metrics to upper management? Do you publish analyst's metrics on a monthly basis? We'd discover why the answer must be yes to all these questions.
5. *Quality programs*
Inspect what you expect is a good management rule. Learn how to modify traditional quality programs so they make sense for your smaller support center.
6. *Support tools*
What are the essential support tools that a smaller support center needs? Where can you find them?
7. *Training*
Analysts need timely and relevant training in order to provide optimal customer support. Discover how to create an environment of continual learning in the support center – without spending a lot of money.

The best practices introduced in this session are based on the material covered in Ms. Robertson's newly published book, [Spectacular Support Centers: Best Practices for Small to Mid-Sized Help Desks and Technical Support Centers](#).

Topic Two: Coaching for Improved Performance in the Spectacular Support Center

Does your support center perform at its optimal best? Can you honestly say your support center is spectacular? If you can't answer yes, perhaps it is because your analysts are not being coached to improve their performance. Coaching is a disciplined approach to helping team members grow and develop their talents. It is also a way to identify positive actions and acknowledge them. In this one-hour session, we will discover why coaching is so important in the support center, the difference between near and far coaching discussions, and the process steps for both types of coaching. You'll understand the importance of planning for coaching sessions. Using clips from Hollywood movies, we'll see some examples of how *not* to coach employees while we discuss contrasting ways to effectively coach them. You'll come away with great ideas for increasing the frequency of positive behaviors in your support center.

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Topic Three: Metrics and Reporting for the Spectacular (Smaller) Support Center

Many managers believe that what you can't measure, you can't manage. In a support center, it is important to measure many things, but the small to mid-sized support center manager has limited time, resources and tools to create fancy reports. However, every support center should identify Key Performance Indicators that align the support center with the business objectives of the larger organization. In addition, it is important to define periodic reports for both the analysts and upper management, and devise ways to routinely publish the reports. In this session, we examine the difference between activities and outcomes or results, and the metrics for each of these categories. We'll look at standard support center reports, such as daily reports, analyst reports, Service Level Agreement (SLA) compliance reports and balanced scorecards, and discuss how you might modify them for your environment. At the end of this session, you'll have a multitude of great ideas that you'll want to implement in your support center.

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Topic Four: Emotional Intelligence in the Spectacular Support Center

We've all come to believe that intelligence, or IQ, is an important factor in our success. Amazingly, recent research suggests just the opposite – that intelligence, as measured by one's IQ, has little to do with success in business. Rather, it is a person's Emotional Intelligence, or EQ, that accounts for up to 85% of a business person's career success. Think about some of the most successful people you know – they may not have an Ivy League degree, but most likely, they are adept at understanding their own emotions and reading the moods of other people around them. The good news is that, unlike IQ, you can improve your EQ with conscious effort!

This workshop will not only introduce concepts of emotional intelligence, but will also provide you with practical steps to improve your emotional intelligence and that of your support center. Using clips from Hollywood movies, we'll see emotional intelligence – or the lack thereof – in action. Most importantly, we'll tie emotional intelligence to success in servicing customers, and how an emotionally intelligent support analyst is more effective than one who is not. In addition, you'll

receive many exercises that you can bring back to your support center to assist the whole team in increasing their EQ and therefore the team's effectiveness.

Topic Five:

How to Create a Quality Monitoring Program for your Spectacular (Smaller) Support Center

"Inspect what you expect" is a good management rule. Creating a quality monitoring program in your support center helps analysts provide consistent, high quality customer support, and gives managers a formal means to provide feedback to their team members. Small support centers are not exempt from having to conduct quality monitoring, although they can certainly modify the programs used by larger centers. In this seminar, we explore the seven steps in creating a quality monitoring program, which include defining your critical success factors, observing key agents, and creating the structure for your program. We also look at traditional monitoring processes and see how to modify them for small and mid-sized support centers. You'll see a template for a quality evaluation form for both telephone monitoring and ticket/case monitoring, and understand how you can develop your own form. Lastly, we'll discover how a quality monitoring program fits into a customer satisfaction program, and how combining the results of these two programs can give a manager a sharp picture of how the support center is performing.

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About Kristin Robertson:

Kristin E. Robertson, President of [KR Consulting](#), helps support centers increase their customer satisfaction and improve their efficiency. Kristin recently published her first book entitled, [Spectacular Support Centers: Best Practices for Small to Mid-Sized Help Desks and Technical Support Centers](#). As a consultant and trainer, she has assisted companies such as FedexKinkos, Blockbuster, AIG, Medtronic, Charles Schwab, 7-Eleven, Inc., Hewlett Packard, Southwest Airlines, SBC Internet Services, and Texas Children's Hospital with their help desk and technical support needs. As a member of the HDI training faculty, she facilitates HDI individual certification classes for both frontline representatives and managers. As an auditor for Service Strategies' Service Capability and Performance Support Standard, she audits over ten support center annually for compliance with over one hundred best practice elements. Before starting her consulting service, Kristin served as an executive at software and financial services firms, managing technical support centers of up to 120 representatives. Employers included Fidelity Investments, Advent Software, Ross Systems, and Fleet Bank. Kristin is a frequent speaker at support industry conferences and events. She received the award of Advanced Toastmaster from Toastmasters International.