

# Agent Expectations

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## Overview

ITS Support Agents provide support for walk-in, chat-in and call-in customers at the ITS Support Center. The ITS Support Center hours of operation are M-F 6:30am-7pm and Sat-Sun 10am-7pm. Support requests range from technical to functional; from password changes to network outages. Clients include Students, Staff, Faculty, Vendors, Parents, Retirees and the General Public.

ITS Support Agents are required to promote the highest levels of professionalism and attention to detail when working with customers. They are the face of ITS and often of the University. The following guidelines explain the duties and expectations of an ITS Support Agent, how those duties are assigned, and what behaviors are expected.

## The Coordinator on Duty

The Coordinator on Duty (hereafter referred to as the “CoD”) acts as the central point of coordination for Support Center operational activities. In the absence of the CoD, a designated Back-up CoD (BCoD) will act as CoD.

The CoD monitors the environment and coordinates Support Center daily operations. The CoD provides operational guidance to agents, allocates tasks to agents, and acts as a Support Center 2<sup>nd</sup>-level expert.

Agents are responsible for contacting their CoD for assistance and clarification.

- Peregrine: All agents are required to receive CoD review and approval before they Re-CSPP a Peregrine ticket
- Breaks: All breaks must be coordinated and approved by the CoD. Do not take a break without prior approval.
- Lunch: Agents must notify their CoD before leaving for lunch. Agents must consult with a CoD if their lunch time might deviate from the schedule. Lunch time will be scheduled for you and must be adhered to for coverage purposes.
- Issues/questions: Agents must consult with a CoD on ANY issue with which they are unfamiliar, uncomfortable, or require assistance. Communication is the most important part of this job and agents are expected to communicate in a professional and prompt manner. When in doubt, ASK!

## General Expectations

- Agents should always exhibit behavior which supports our primary goal: to process customer contacts in an efficient manner in alignment with our processes and procedures. Be prepared, follow process, and use down time to improve your ability to support our business.
- Arrive a few minutes early for each shift, so that the CoD can assign your duties. It is your responsibility to find out what you are doing that shift if there are ambiguities on the schedule. If you are unsure, ASK your CoD without delay. You are also expected to be logged in and ready to take calls by the time your shift begins.
- Remember that you are working in a professional environment, and act accordingly: No loud chatter or horse-play in the phone room - this distracts others taking calls, and can be overheard by callers/customers in the reception area and over the phone.
- No disparaging remarks about callers/customers - not only is this unprofessional, it may be overheard by someone else on a call, or by students/staff passing through the reception area.
- If you have received a frustrating call/drop-in, contact your CoD. The CoD can help you ‘decompress’ or give you a short break. If necessary, the CoD can take the call for you – agents should never feel abused by our customers.

## Staffing

The Support Center operates from two locations: downstairs and upstairs. The downstairs location **must be** staffed M-F 8am-5pm; the upstairs location is generally utilized M-F 6:30am-8am, 5pm-7pm and Sat-Sun 10am-7pm. Upstairs workstations may also be utilized M-F 8am-5pm if there are not enough downstairs workstations available or if an agent

is assigned to project work. If you have any questions or additional workstations are necessary, consult your CoD for guidance.

Agents are responsible for reviewing the SC schedule to determine their shifts and roles. Upon arrival for a shift, agents are expected to consult their designated CoD for confirmation on the currency of the schedule, and for workstation assignment. Unplanned issues may result in changes to the schedule and the CoD will have information on any schedule changes.

*This table describes which support requests and work must be processed during each time frame*

	Phones	AAQ	Chat	Walk-In	Project	Side Work
M-F 8am-5pm	✓	✓	✓	✓	✓	✓
M-F 6:30am-8am & 5pm-7pm	✓	✓			✓	✓
Sat-Sun 10am-7pm	✓	✓			✓	✓

## Roles

The following describes which roles an agent might fill in the Support Center. Roles are designated on the official SC Schedule (found on the SCQR page).

### *Front Desk (FD) – Chat, AAQ’s Walk-In’s*

The ‘Front Desk’ role is responsible for processing Chat, Ask-A-Question, and walk-in service requests. One or two agents will be designated to work the ‘Front Desk’ role. These agents will provide back-up phone support as requested by the CoD.

- No headphones, homework, personal browsing, or reading while on front desk. The front desk is the most public location in the SC, and must present a professional demeanor at all times.
- Be aware of the surroundings and err on the side of caution when you notice something not right. Follow emergency procedures as needed.
- Do not assist people without a LoboCard in accessing the building when the doors are locked after-hours. During normal business hours, 8am-5pm, the doors throughout the building are unlocked. Before and after normal business hours, access is allowed to LoboCard holders while the Pod is open. CoDs can access the building at any time.
- Occasionally, you will need to direct people to meeting rooms or offices, and if possible this should be done in person. Note: these people are not considered walk-in clients.
- Occasionally, delivery people will try to leave packages for you to deliver. If you can contact the recipient via phone then we will accept the package, otherwise, please direct them to Shipping and Receiving dock around the back of the building. Note: these people are not considered walk-in clients.

### *Phones*

The ‘Phones’ role is responsible for processing phone calls from the Support Center ACD queue. Several agents will be designated to work the ‘Phones’ role. These agents will provide back-up chat, AAQ, and walk-in support as requested by the CoD.

- Agents will have their own ACD login code. This code should not be shared with other agents, as the code identifies you on our monitoring tools and reports.
- If an agent finishes their call and there are more calls in queue, they are expected to take their phone out of Work mode manually without waiting for the 4 minute timeout feature to expire.

## *Project*

The 'Project' role is responsible for working on projects, as designated by the CoD or agent's supervisor. If an agent assigned to the 'Project' role does not have a pre-assigned project, they must contact their CoD or supervisor and request project work.

## *Training*

The 'Training' role is assigned to new agents who are receiving initial training. Agents in the Training role are expected to contact their CoD for details on specific training assignments.

## **Support Requests:**

The following provides descriptions and guidelines for processing different types of support requests.

### *Chat Processing*

- Agents are expected to follow all Chat processes as outlined in FI 5487
- Chat must be staffed at all times between 8am and 5pm.
- An agent must always be available and ready to receive chat requests. The FD agent is responsible for ensuring that another agent is available to accept chats before the FD agent changes their status to Unavailable or signs out. This includes any time the FD agent takes a break, ends a shift, or steps away for more than a few seconds.
- Agents are expected to respond to every chat message within 1 minute.
- Please be aware that ITS provides an administrative role in Chat for all of UNM as we are the default 'roll-over' queue. If another department is not able to field all of their incoming chats or they do not have any agents logged in, we will receive the chat after 4 minutes.

### *AAQ Processing:*

- Agents are expected to follow all AAQ processes as outlined in FI 5488
- AAQ's must be handled within 15 Minutes after they appear in the queue and/or are updated.
- AAQ's must be processed by priority, then age
- If you are unable to meet the 15 minute deadline, you must notify your CoD. The CoD may designate another agent to assist your with AAQ's - make sure to communicate clearly so two people do not work the same AAQ ticket.

### *Walk-in Processing:*

- Agents are expected to follow all Walk-In processes as outlined in FI 5489
- A walk-in is a client who comes in person to the ITS Support Center, seeking assistance from us. The SC FD also acts as a "reception area" for ITS visitors and clients; for the purposes of this document, only people who are seeking assistance from the SC are considered "walk-in" clients.
- Greet each walk-in client immediately. If you are right in the middle of something, let them know that you will be right with them, then find out what they need as quickly as possible.
- Every machine we work on for a walk-in client must sign the liability release form – the FD agent is responsible for obtaining this signature. Even if another agent assists the walk-in, the FD agent is accountable for acquiring the signature, not the assisting agent.
- Every walk-in interaction must be logged into RightNow as an incident - the FD agent is responsible for ensuring the incident is logged. Even if another agent assists the walk-in, the FD agent is accountable for opening an incident, then verifying that the incident is updated as appropriate.

### *Phone Processing*

- Agents are expected to follow all phone processes as outlined in FI 5490
- **Timeout feature:** If you are ready to take calls, take yourself out of Work mode manually.
- **Call Logging: Any phone interaction (phone call, voicemail)** Log 100% of calls received
  - **Phone greeting:** You are expected to use the SC script to greet clients.
  - **Contact:** You must capture Contact Information accurately.

- **Repeat Customer:** If the client is calling in reference to an issue that they contacted us about in the past, locate the previous ticket in their Incident History (consult a CoD if you cannot find it), and use the previous ticket to record this call (ie: do NOT open a new ticket for the same issue).
- **Hold:** Never allow a user to sit on hold for more than 2-3 minutes without returning to apologize and thank them for continuing to hold.
- **Extended research:** Offer the option of receiving a callback.

## Other Support Center Work

### *Side-Work*

Side work is delegated by the CoD based upon business need.

If an agent is not working a client contact, they are expected to proactively request side work from the CoD.

### *Down Time*

- Agents are responsible for making good use of work time and ensuring that they have enough work to stay busy.
- If an agent is not working a client contact, the agent is responsible for contacting their CoD and requesting side-work.
- If there are no assignments available, the agent is expected to use this time to improve their skills via online training (Lynda.com, Learning Central CBT's, etc) or via testing ITS Services and applications (Groupwise, webmail, list.unm.edu, LoboWeb, etc). The CoD can help Agents get started with appropriate learning packages/projects.
- Homework, personal reading, and personal web browsing (Facebook, My Space, Comics, etc) are strictly prohibited. An agent may not perform personal tasks unless they receive explicit approval from their CoD.
- Personal phone calls require CoD approval

## Shift Expectations

### Shift Management

- Agents with scheduling issues are expected to proactively communicate with the CoD via phone call, email, text, instant messaging, or face-to-face for any foreseeable issue or questions related to the schedule. If you cannot locate the CoD or do not have access to the online schedule to determine who the CoD is, you must exercise due diligence in making the other CoD and supervisors aware of the situation.
- For unplanned scheduling issues (ex: unplanned sick day), the agent must contact the CoD via phone – preferably at least 12 hours prior to the start of the shift, and **never less than 30 minutes** prior to the start of the shift. Each CoD has their contact information posted in internal FastInfo Answer ID# 1683. Please program CoD phone numbers into your cell phone, or carry a list of CoD phone numbers, for times when you may not have the Internet available. Let a CoD know if you do not currently have a cell phone, this is perfectly acceptable; we would just like to know.
- Stay current on your email and review the whiteboard between shifts
- You are responsible for knowing your schedule. These are made available online at the by end of day on the Wednesday prior to the Saturday work week. If this is not posted please notify a CoD immediately. These are located at our Support Center Quick Reference (SCQR) page, <http://hdesk.unm.edu/scqr/scqr.php>.
- If you are running late, call the support center as soon as you believe you cannot make the start time for your shift. DO NOT wait until you get to the support center to tell us you will be late.

### Shift Guidelines

- Agents are expected to follow all shift processes as outlined in FI 5481
- At start of shift, approach your CoD for workstation assignment and role confirmation
- Communicate with a CoD if you need a break. If an employee desires a break, they are entitled to one 15-minute break per 4 hours worked.
- No homework unless approved by the CoD.
- No personal web browsing unless approved by the CoD
- No personal phone calls unless approved by the CoD

- Take the initiative to be actively aware of the dynamic requirements and operational status of the SC environment, including:
  - View GNAV for call statistics
  - Regularly view Whiteboard for outages, issues, and updates
  - Regularly check email
  - Be familiar with schedule and identify potential gaps in coverage or other issues
- Communicate with a CoD to request side work projects/assignments/training
- Do not log out until your allotted time on schedule. If you are scheduled until 5pm, you are expected to stay logged in until that point. We can transfer calls or chats if need be to let you leave on time.
- At end of shift, tidy your work area - throw out used paper, drinks, food etc.

## **Environmental Awareness**

Although agents are assigned specific responsibilities each shift, use common sense in ensuring customers are dealt with appropriately. We expect you to exercise your good judgment when it comes to helping manage the work load. Your CoD is ultimately responsible for balancing work load but your initiative is noticed and appreciated. Situations where good judgment is needed:

- If two Agents are assigned to ACD duty, there are no calls in the queue, and there are several people waiting at the front desk, one person can go ON WORK and help at the desk temporarily.
- If only one person is on the ACD, the queue is building, you are on the front desk and you only have one Chat and no Walk-ins, go OFF WORK and take a call.
- You just finished a password reset and have captured all of the necessary information while the queue has 3 calls waiting 3 minutes. Open a new ticket and take another call immediately and then wrap up that first ticket when you have a moment. This is why your ACD process is so imperative, so the information is captured before the call is ended and without delay.
- If you have any questions about what you should be doing, you are responsible for contacting your CoD.