

Technical Support Essentials

Advice You Can Use to Succeed in
Technical Support



Andres R. Sanchez



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Technical Support Essentials: Advice you can use to Succeed in Technical Support

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To Victoria, Julio and Diana
The reasons and rewards behind all my endeavors.

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About the Author



■ **Andres R. Sanchez** currently works at CA, Inc. as a Support Delivery Manager for the Clarity Project and Portfolio Management solution in Plano, Texas. He has been in Technical Support, in one form or another, for his entire IT career since 1991. He started out in a small entrepreneurial company selling computer systems and solutions to the printing industry and doing everything from selling to technical support where he learned all the stages in a small technology company. He has been in Enterprise Software support since 1998 when he joined Abirnet Inc. Early in his career in the 1990's, he worked in consumer product support, in medical office management software support and in an internal helpdesk for a large communications company. This experience allowed seeing the technical support field from different angles and with different customer mindsets.

Andres received a Bachelor of Business Administration in Economics from the School of Business at The University of Texas at Arlington, a Masters in Business Administration in Information Technology from the Graduate School of Management at the University of Dallas and is currently pursuing a PhD in Leadership Studies in Business from the Gary Cook Graduate School of Leadership at Dallas Baptist University.

He lives in Arlington, Texas with his wife and kids and spends his weekends running a cattle ranch in Navarro County, Texas.

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Preface

Thank you for taking the time to pick up this book. I invite you to read the chapter introductions to get a sense of the themes discussed in the topics. Being a support person myself, I know how short we are on time and how much our days are interrupted by cases, issues and technical problems. For this reason, I wrote self-contained and concise topics of typically no more than 1,300 words each. You can read them in sequential or random order and still get the same value. Each topic does not assume that you have read the prior ones in the chapter so you can pick and choose.

Do not let the name Technical Support Essentials fool you; this is not a beginner's guide to technical support. The "essentials" refers to the core of our profession including the challenges, opportunities, and peculiarities. I wrote this book with the experienced professional technical support person in mind. In these pages, I will not tell you what support is; I assume you already know and I assume that support is what you do for a living. What I will do is expand your view of technical support and present the essentials, the fundamentals that make this a great profession.

I also do not assume that I am preaching to the choir. I want you to analyze what you are reading and make up your own mind. It is possible, and likely, that you come up with some new ideas out of reading the next twelve chapters. The text is deliberately written in a style that leaves it open to criticism and to entice you to think more about the topics as they apply to your own work and the products and technologies you support.

The book is intended for the general support profession. Some of the examples pertain to the software support field but that is only because that's where my experience lies but the topics are intended to provide value regardless of your line of technical support and its subject matter.

The tone and depth of the book change depending on the section. The first section is more personal and you will see a very internal style of writing of delivering the information. My intention is to make a personal connection with you and your work. The application of the advice and ideas are up to you individually and the material's intention is to give you some perspective on the preferred and most efficient approaches. The first three chapters are a must if you want to get a good glimpse of how the work applies to the individual. Chapter 2 is all about the field itself and how it has progressed and shaped individuals and the practitioners view it. It also includes some models on support styles. In chapter 2 I make the case that our field should come to the limelight and establish itself, through us, as a formal profession with all the benefits and opportunities of a discipline.

In the second section, comprised of chapters 3, 4 and 5, the material is all about working with others within the support group and the greater support organization. Chapter 4 deals exclusively with the support group and the dynamics of the collective. It is a must read for getting an insight into a theoretical and practical view into the grouping of individuals for support work. The last topic contains a group inventory which will help you determine the qualities of your group and the dynamics that affect it. Chapter 5 presents the topics dealing with colleagues and the interaction with you and the people with whom you share the work. It also presents some topics that are

rarely mentioned but of uppermost importance such as solidarity and criticism. Section 2 ends with a chapter on leadership and presents it in a way that will probably be new to you. It challenges the popular belief that managers are leaders and that leadership only comes from those in power or authority. Leadership is presented as something within the reach of anyone. The chapter is based on the formal leadership body of knowledge and includes the Pragmatic leadership model that has never before seen the light of day. Leadership is fast becoming one of the most studied social sciences in masters and doctoral departments in universities everywhere and with Pragmatic leadership technical support is making its mark in this highly respected formal discipline.

In Section 3, the chapters revolve around the aspects of the technical support organization and include topics on everything from organizational behavior to the role of management. Chapter 7 deals with the roles and behaviors and goes in-depth into the causes and consequences of behaviors as well as its formations. Chapter 8 on structures and tiers is a must read for anyone wanting some perspectives on the formal structure of the technical support organization. It discusses different structural models and helps you make a comparison with the more typical structured model. Chapter 9 on process and practice digs a bit deeper into processes and the different variances of their origins and applications. It also discusses the concept of 'practice' and where it fits in to our line of work.

The last section is anything that did not fit into any the other sections and that which deals primarily with customers such as customer service and value added actions to the normal support. Chapter 10 deals with the often enigmatic topic of customer service. In the topics included in the chapter you will see a different angle to the classic view of customer service as the act of being nice and tolerant of customers' complaints and idiosyncrasies. The chapter makes the case that customer service must come down to value as a guiding principle to the determinant of its use. Chapter 11 is about the communication that takes place specifically within the support group and with the group's constituency. I did not get too much into technology and trends in communications because it is an area that changes quite frequently and the fad today becomes obsolete tomorrow. I addressed some of the communication behaviors that add detriment to the work and the causes and solutions to them. The chapter closes with a very valuable technique to change and impact customers' perception of the value we add to their cases. 'Spinning the No' is a technique that only the most experienced and effective support professionals develop over years of dealing with customers. However, having the right mentor, group support and now this documentation of the technique will assist you in mastering this technique. The book closes with Chapter 12 which is my formed perceptions on the potential of the profession as well as my message and to you. I have only the best professional intentions for you and for the advancement of the work itself. Predictions are not my forte not do I intend to do such thing in the last chapter. I just want to present possibilities as I see them with basis on market and industry conditions as well as the foreseeable revolution in the technology and the demands such changes will have on technical support.

Take this book as a short introduction into the vast array of possibilities that await our field and its participants. This book is for you and I, the people who actually do the work and toil in the trenches armed with knowledge, skills and techniques as our primary tools. There is a lot more left that needs thinking and writing in this field. This book is by no means exhaustive but merely to make the support expert, you, think and experience the vastness of the support discipline.

Introduction

A few months ago, I was entrusted with a project for the technical support organization at the company where I work. I needed some theoretical foundation for technical support as well as some insights into techniques, foundations and processes to go about doing the support work; something that did not originate with my support organization itself. I went to bookstores, libraries and search engines and found nothing of consequence. The few sources I found were on explaining what technical support consists of or how to setup a technical support operation. The rest of the sources were on how to take a lot of calls and the ways to run a helpdesk. All very practical topics but not profoundly developed ideas. I found a few books on technical jobs and they all said that technical support was growing at a huge pace and set to be one of the biggest fields in the future. That is when I realized that the reason we didn't have any foundational theories in technical support is because no one has yet sat down to write them.

Support is what I have always done as my professional career. I studied economics in school but upon graduation, I couldn't find a job that paid nearly as much as I was already making in technical support; therefore, like many of you, I came into and remained in technical support by necessity. Over the years and with the accumulation of experience I grew to love the profession and the work.

A good friend once told me that a man should do three things before leaving this world. He said every man, or woman for that matter, should have a son, plant a tree and write a book. I don't plan on dying anytime soon but I figure I might as well get ready; just in case. Seriously, I wrote this book with the intention and desire to give something back to the field that has given so much to me. This discipline has allowed me to grow, mature, and sustain a home, family and life. It is my attempt to add something to the technical support body of knowledge which is still quite young but growing.

Technical support has only been around for a three decades at most; at least with that name. Yet, the work is truly a very humanistic approach to that very fundamental need; provide answers and assistance to those who seek them. The need and demand for the work has grown exponentially with the information revolution that hit us in the late 1980's. However, it has its roots in the mainframe computing world of the 1970's. The technology industry is not the only one that uses technical support to provide customers with the information they need. Technical support exists in any industry whose products, services or projects are complex enough to warrant an expert professional to provide resolutions and advice to users' and customers' problems.

The next chapters you will read about my thoughts and experiences in and about this exciting field. You may agree or may think ridiculous the ideas and concepts I present to you. My intention is to induce you to think, reason, wonder, critique, concur, disagree and hopefully desire to add your own ideas and contributions to this young discipline. Only with contributions can we make it easier and more interesting to the ones that come after us.

Please don't think of me as any different than you and your colleagues. I have answered thousands of calls, closed thousands of issues, handled many upset customers, satisfied many customers, ticked off a few more, learned dozens of technologies, mentored a few colleagues, learned from many others, had my failures and successes, and still longed for more. I love my profession and cannot imagine doing anything else.

My biggest challenge in writing this book was my inexperience in book writing followed by the lack of sources on the subject. Writing extensively and deeply in a topic requires the author to have a foundation literature on the subject. Because such foundation is small in technical support, I was forced to go outside of the discipline and synthesize other works in fields like organizational theory, management, psychology, leadership and economics to name a few.

The other challenge was the time writing a book requires. With a full time job and the current pursuit of a PhD, my time was limited so I had to write this book from 10pm to 2am over a nine-month period. The writing and research takes a lot of time as does the thinking through the topics and the organizing of the concepts. I did my very best and hope you find this book useful.

PART 1



Advice for Dealing with Yourself and Your Work

In this part, you will look at the way you deal with the work itself. I will discuss the mindset of the ideal technical support person in regard to the work and the experiences gained from it. Often, it is the way the support person views the work that makes the difference. Besides the support level, technical expertise, and support experience, the technical support person with a positive and open attitude will produce the best work and act in the best interest of the customer and the company, and make a name for him- or herself in the process.



Your Work Ethic

This chapter will explore the different aspects of the support person's work ethic that are conducive to a successful career in technical support. It will also give advice on the ideal principles and behaviors that make the support person's interactions with colleagues, management, and customers productive and as free of friction as possible. The advice will be limited to professional topics within the technical support realm. Specifically, this first chapter includes material on creating a dynamic career in technical support, the concept of troubleshooting, initiative, specializing and what it takes to keep your job and much more,

Look around you for the ideal support person: the guy or gal who produces the best work and, despite all the inherent work pressures in technical support, still manages to walk around with a smile and a positive outlook. When we study ideal support people, we find the follow common characteristics:

- A true and deep commitment to the customer. This is not just lip service. Admirable support people often take a true interest in the situation and problems of the customer. This empathy goes beyond just providing the necessary help and arises from having a genuine concern for the customer on the other end of the line.
- A deep belief in the company. Great support people believe in what they do and who they work for. When technical support people believe in their company and in their roles, it shows in their interaction with the customer.
- A real sense of collaboration. Support people who excel in their work rarely do it alone. Success in technical support requires working with others, from the support colleagues to the development and sales team.
- A talent for solving problems. Technical support is about solving customer problems in the most efficient and fastest way possible. A natural or acquired skill for problem solving is absolutely required for success in technical support. Some people appear to have it naturally, others have to learn it, but all must possess this essential skill.

■ **Tip** After all is said and done and you've proven yourself right or wrong, the only thing you have to show is how well you adhered to your principles.

The Value of Technical Support Work

Do you ever wonder what it would be like if your job did not exist? What if the buyers and users of your product or technology were left alone after their purchase to fend for themselves? How far do you think they would get? No one knows who the first technical support person was or where the idea for technical support originated. Our field is obscure enough as it is so no one has documented the history of the technical support field and its pioneers in a decisive manner. The truth is that our field is not the most glamorous. After all, did you ever wish you would grow up to be a technical support person? I know that was not my dream as a kid for I really wanted to be truck driver... right after I wanted to be an astronaut, but before I wanted to be an attorney. Anyway, you get the idea.

Let's face it. Most of us ended up in technical support by accident or by necessity. However, technical support is a very rewarding and important aspect of many industries. Technical support people are the ones who take care of customers and users after they purchase the product. As support people, we are often responsible for the success and adoption of products and technologies. If not for support people, the customer would be lost without a way to implement and solve the problems that arise during use.

Therefore, the first thing I want to address is how we look at our work and the value that we provide to our customers for the benefit of our company. Never think that support people are somehow less important than sales, development, or services personnel.

When you look at your job in technical support, think of it as the opportunity to act as a liaison between the customer and your company. The technical support position is very demanding and we often don't fully appreciate the skills that we must master:

- Customer service
- Technical knowledge
- Troubleshooting skills
- Time and task management
- Quality Assurance (QA)
- Technical services
- Pre- and post-sales support
- Training development and delivery

Can you imagine the type of work you are capable of doing by having all those skills? If you really think about it, technical support people have it great. We are exposed to a lot of challenges, customers, and even cultures, and all of those things keep the work from being boring. The variety in this line of work is what makes support so interesting and rarely dull. Because of the nature of our work, technical support people are very flexible and adaptable, even under pressure from multiple issues and customers. We are capable of handling complex technical issues while dealing with customer service at the same time.

What can you do with your technical support skills if you decide to leave your technical support position? You can do just about anything. You can develop, test, sell, install, plan, and do many other things that require a good perspective on dealing with customers, technology, technical people and technology users in general. While you may remain in technical support for a long-term career, know that you have the skills necessary to make it in many other positions. If, like many of us, you want to stick to support know that there will be technical support work for decades to come, with position availability all over the world. So the next time you think about your prospects and future in technical support,

remember that as long as technical products are being developed and sold, there will be a need for someone to support them.

In my current job, I have colleagues who have worked in technical support for almost three decades. One such colleague has been in the industry for 29 years and when he started, he had to write down issues on paper because the company did not even have an issue-tracking system. I asked him why he chose to remain in technical support for so many years. His reasons for sticking to technical work were simply that he was good at it and he enjoyed it. During his career he had the chance to move briefly into management and development, but he chose to go back to support. He said that is where he felt most at home and where the company would get the most benefit from his work. He eventually made a move to QA and the skills he learned in technical support help him succeed to this day. For many, technical support may seem like a temporary position, but it can also be a lifelong career.

Another colleague started working in our group a few years ago. He was fresh out of college and needed a job. He started work in technical support for our security software. He was not particularly knowledgeable about security or well-versed in software troubleshooting, but he was ambitious and learned quickly. He became very productive and an expert in our technologies as well as familiar with our competitors' product offerings. After two years in technical support, he was offered a position in product management. The skills he learned in technical support allowed him to rapidly succeed in the product management arena. A little over a year after he took the position in product management, he took another job with a large news organization in the area of online offerings product development.

I have also seen many individuals who succeeded in other areas of technology fail miserably in technical support. The reason many of them could not make it in technical support is usually because they had one or two of the skills necessary but did not have them all or could not develop them all. The main reason that some cannot develop all of the skills necessary to succeed in technical support is because those individuals come from a strong paradigm that deals strictly with technology or people, but not both. An example is developers who work strictly with technology, but not with people. Another example is customer service people who are great with customers, but not with technology. Technical support is not for everyone, but a good technical support person can make it anywhere. So next time you think about your work, remember this: you are extraordinary and not just anyone can do your job. Learn it, do it well, and you can succeed in any area of technology.

■ **Note** Technical support is probably the most complete job you can get in technology in regard to skills requirements. Mastering technical support will enable you to do just about any other technical position and much more.

A Dynamic Career: Moving Up Laterally, and Even Down When Necessary

Technical support can be a very rewarding and exciting career if you make it dynamic. The typical technical support person starts out as a rookie, becomes proficient, and after a few years, rises up the technical ladder as an expert. Then what? The expert has two choices: keep doing the same thing day in and day out or make a move into some other area of technical support. The move does not necessarily mean going into development, sales, services or any other line of work altogether. A move can simply mean moving to another product, to another aspect of the product, or to another aspect of support. In a company with multiple products, this is a simple proposition. In a one-product company, this becomes

a little harder, but not impossible. Why does the expert need to move? The support person who reaches the pinnacle of the product's support expertise runs the high risk of becoming comfortable in the position. There is nothing wrong with being comfortable in a position, if you are close to retirement and just need to coast for the last few years of your career. After all, you have already proven yourself by becoming an expert and putting in your time.

But what if you still have many years of service until retirement? Are you really planning to spend the next 5, 10, or 20 years supporting the exact same product and answering the same questions over and over again? Trust me, I've been there and know all about it. I have also seen colleagues who spend 20-plus years in the same product or in the same position with probably very little variety in their career other than the occasional merger or acquisition every few years. Yes, I know, I have been acquired four times. I once supported the same product for 10 years and got very tired of answering the same questions, year after year. How did I keep my sanity during those 10 years? I picked up additional products and got into different support roles to add variety to my career. It was not easy, but it also was a way to keep work less boring or monotonous.

Thinking about your technical support career as dynamic may be a foreign idea to you. Let us start by looking at what you do. If you are not yet an expert in your work, then you may want to become very proficient in your area before trying to make a change. The easiest thing to do is to acquire new skills not related to technical support. The second easiest is to move to another product or to management. Let's begin with the easiest option.

If you've already reached the guru level and you have been with the current product for a relatively short time, then look around you and find someone whose job you think is interesting and enviable. Is it the services person who gets to travel and visit customer sites? Is it the instructor who teaches a class to customers and seems to have a great time at it? It could even be the technical writer. Whoever it is, find someone whose work you like and then find a way to get involved. Making your technical support career dynamic simply means making it interesting by adding variety to your workday and by adding to the arsenal of skills you already possess. It also means adding value to the company and allowing your employer to benefit from your new skills. I am not suggesting that you leave technical support. What I am suggesting is that you explore and acquire skills to make it possible to leave technical support if you so desire.

The next step after finding someone whose job you find interesting is asking for an opportunity to help that person and to learn. Most people are eager to talk about themselves and what they do so all you have to do is ask. Start by helping out with small things that do not take away from your job. This will allow you to learn the basics and familiarize yourself with that new skill.

After you are acquainted with that new interest, implement it into your current role. Why implement something new, such as technical writing, onsite services, teaching, and so on into your current role? Simply because you are the expert in your field and no one is going to question you. After all, this is a book about succeeding in technical support, not leaving it. Using new skills, other than troubleshooting and product knowledge, will make your career more interesting and will increase your value to your employer.

The next thing you can do is make a lateral move and support a different product. This is a strong recommendation for people who have been doing the same thing for more than five years. There is nothing wrong with doing the same thing for many years, but it is probably not a dynamic career move either. At first it is very hard to make the adjustment but you will learn that change is healthy and keeps you learning new skills and eventually makes for a rewarding career. Also, remember that if you have an interest in management, there is always the possibility of a technical support management job.

I have a colleague doing technical support for the same product for more than 20 years. He asked me for advice about getting his career to be more interesting and rewarding. We work for a company with more than 400 products. The first thing I advised him was to move to another product with more future, people, and opportunities for growth. He responded that such a thing was out of the question. When I asked why he thought this was the case, he could not respond. After a few minutes, he told me that he has grown so used to his product that he fears doing anything else. Don't let this happen to you.

■ **Tip** Do everything you can to keep your career dynamic before you grow so comfortable that it is scary thinking about anything else.

Keep Your Job

This section's heading may seem like a very logical statement. No one takes a job and then tries to get fired, but it happens all the time. We have all seen the new colleague who seems like a great fit for the job and somehow manages to get fired in a few months or weeks. I have seen it many times. It is hardly ever due to lack of expertise or lack of work for everyone. So why does this happen? Is there logic to it? Let's first examine what it takes to keep a job and what the decision makers, typically management or team leaders, look for in an individual.

There are four specific characteristics that generally allow the individual to keep their job. The lack of any one of these makes the employee a good candidate for termination:

- Interest
- Capacity
- A team player's attitude
- Productivity

By *interest*, I am referring to the technical support person being engaged in his or her duties. Specifically, it means showing interest by being responsible and carrying his own weight in the group and complying with policies and work responsibilities. The disinterested individual usually shows specific behavior such as being late regularly, chronic absenteeism, not caring for the customer, leaving before the shift ends, and disregarding company policy. It is also possible for a seasoned technical support person to sometimes show a disinterest in the work or policies, and this is when good people lose their jobs. These are just a few of all the possible reasons why such a lack of interest may happen to an employee but the symptoms are usually the same.

How do we maintain our interest in the job? The first thing is to keep focused on the work itself. We all have personal problems from time to time. We may even have problems with colleagues or management. However, we must always remember that our duty is to the company and the customer. As hard as it may seem, the technical support person must leave personal problems at home. The type of work we do is extremely sensitive to anemic or depressive moods. Sometimes a vacation or a few days off will help. Seek help where it can be found. Take some training or find some new way to keep the job interesting. In the many years I have been in this field, I had my share of hard times where I wanted to do something else entirely and forget about customers and their problems. To my good fortune, there was always something that came up to make it a bit more interesting and keep me in technical support.

If you notice that you may be losing interest, assess your situation and have a talk with your manager, a counselor, your spouse, or someone else who can help. Keeping quiet is probably the worse thing you can do. Talking about the situation that is causing the loss of interest will make you feel better and reinvigorate your interest and passion for the work.

Another characteristic that can get you fired pretty quickly is lacking the capacity to do the job. Capacity refers to the potential and the ability to learn the technical or customer service skills to do the job. It takes a clever individual to get past a job interview by sounding intelligent and talking his way out of a question, but it takes a real genius to fake technical knowledge in front of colleagues and customers. In other words, it can't be done! Technical support is absolutely not a field for charlatans. If you got the

job by lying about your skills, you better learn fast or leave on your own, because you will be discovered sooner than later.

An individual who lacks the capacity to do the job is different from someone who has the capacity but just lacks the experience or specific skills. The person with the capacity but no skills will generally be lost at first, but will pick up the skills necessary. I've found myself and have seen others in that situation many times. However, if the person also lacks the capacity, he or she will never learn or do it very slowly. These are the individuals who always ask the same questions, and who never seem to learn the concepts despite training and mentoring; they are usually the ones who never seem to progress technically or do it extremely slowly. People who lack the capacity for technical support are always in danger of losing their jobs because they use up the same resources, and sometimes more, than a person who has the capacity for the job. Therefore, if you think you lack the capacity for technical support, try to develop it with training and education. If you still find that technical support is too much for you, try another less demanding area.

The third aspect that may get you fired is not being a team player. What exactly does this mean? We hear it all the time. So and so is "a team player," or he "took one for the team," and many other references to team playing that typically get it wrong.

Being a team player means having the ability and willingness to collaborate to get the work done and the issues solved. Have you ever seen the expert who knows all about the product but never wants to answer your question and gives you a bad answer when you ask? Or the colleague who turns down the after-hours pager week after week and does not want to pull her own weight? Being a team player is looking out for each other without trying to compete or hide answers from the rest of support people in the group. Resources, such as time and energy, are scarce. A member of the team who becomes a destructive force is the ideal candidate for the next round of layoffs.

Even if you have the previous three aspects nailed down, if you don't produce enough to merit your salary you will probably lose your job sooner or later. This is the most important determinant for holding on to your support job. A good way to make sure you are in good standing is to find out the average of issue closures and issue handling per person. The idea is to strive to beat the average.

I have seen colleagues get fired when the company needs to cut employee numbers. Some of them I admired for their technical skills and others were good friends, but with all of them, I understood. I even tried to work with some, but they did not improve and the inevitable happened. I am also a firm believer that everyone has it in them to be a good employee, they just need to be in the right environment. Sometimes, they just need to go somewhere else to succeed.

A few years ago, I had a colleague that I admired for his immense knowledge of Microsoft Windows. This guy did not just know some intricacies; he knew Windows inside and out. I could ask him anything about any Windows version and he would know it. His work was great and customers were happy with him. Nevertheless, he liked to bad-mouth the company and management. He had no interest in the company and had a terrible attitude toward it. It was not only criticism but verged on defamation. Others around him were beginning to follow his example, and behave the same way. One day, I called but he was gone, walked out that morning. I reached him a few weeks later. He was working at another company and seemed very happy. This time he was very positive about his employer.

■ **Tip** It takes some effort to get a job and a little more to keep it. But it doesn't take a lot to get fired. In fact, put no effort into your job and that's probably what will happen.

Yeah, It's a Job, But Make It More

Back in the mid-1990s, I found myself working in an internal helpdesk at a large communications equipment company. It was a very tough physical environment. The work was not at all bad, but the conditions were. There were six helpdesk people working in a small room, along with a supervisor. We helpdesk workers had barely enough room to turn our chairs and we had to tiptoe our way out since it was that cramped.

The room we were in was next to a server room where the temperature was always around 45 degrees. In order for the network and server administrators to go into the server room, they had to squeeze through us. Every time they went in and out of the server room, the cold air would come out and freeze whoever was closest to the door. The oldest of the group was a man in his late forties named Don who, after a career in the military, had found his way in the civilian work force and somehow ended up working in this help desk. He had been there for a few years before I arrived.

It was apparent that Don did not like to work there and he made every effort to let everyone else know. He was usually grumpy with the rest of the group and his attitude was usually negative. I once asked him why he chose to stay if he disliked the job so much. I reasoned that after all, it was just a job. He answered me in a very annoyed tone with a face to go with it, "To me it's not just a job, it is my livelihood!" In a few words, he explained that he had to work there for financial reasons. I was in my early twenties, and when I heard him say that, I immediately pictured myself at his age saying the same words to another rookie like me. It was a scary proposition.

We all have to make a living somehow. Technical support is no exception. However, it does not have to be *just* a job. We can make it fulfilling. We can take the opportunity to achieve personal goals, develop skills, and simply find a way to make it interesting. It truly is all in our heads.

In Maslow's hierarchy of needs, human needs start from the most basic, physiological, to the highest need of self-actualization. The needs are the following:

- Physiological
- Safety
- Love/belonging
- Esteem
- Self-actualization

There is no reason why our job should only fulfill the physiological and safety needs. Yes, we all need a paycheck to keep a roof over our heads and food on the table. However, we spend a great deal of time and effort in our job. We might as well make it more fulfilling and, at least partly, allow it to fulfill the rest of our needs.

Just how can our technical support jobs fulfill these needs? If you analyze the typical technical support environment, you'll see that most of us spend at least eight hours a day sitting in a cubicle surrounded by people doing similar work. The most obvious thing to do is to socialize so that personal bonds form and there is a genuine sense of belonging. American culture is more individualistic than other cultures, but we still like to socialize. I always enjoy listening to the stories from my colleagues in India. It is not uncommon for them to go on picnics or weekend getaways with coworkers. I usually just get to see the pictures and wonder what it would be like to do the same. We probably would not do that type of thing in our office, but we still have picnics and the occasional dinner or holiday party. If you think that your job is not fulfilling and you feel like socially you don't belong, then you may be in the wrong place. Think about this: we spend half of our waking hours in our job, so we better find a way to make it fulfill as many of our needs as possible.

Humans also need esteem and respect. Technical support is a great field for gaining at least some level of respect. Working in a technical group, there is always an opportunity to specialize or stand out by way of skills or performance. Also, skills are not always technical. There are support people who are excellent mentors, instructors, team players, social supporters, researchers, and writers. There are numerous ways in which a technical support person can stand out and gain the respect of his peers. However, this will never happen if you view the work as just a job to pay the bills.

What I am referring to is commitment. It takes a lot more than just being there because they pay you. There has to be a level of motivation and feeling of responsibility to the work. The sense of responsibility that goes beyond what the job description requires and beyond financial expectations is dedication.

Dedication leads to self-actualization. The feeling of success is a mental state of satisfaction with your own achievements. It all starts and ends within us. Of course, it also needs a dose of reality and some harmony with external factors, but as long as you feel fulfilled with your job in technical support and as long as you are not getting bad reviews for lack of performance, then you have made it. At the end of the day, success is doing an outstanding job, and enjoying it at the same time.

A few months ago, I started a project to find out what made our top performers in technical support so good. I am referring to the handful of individuals who close the most issues and who receive the best customer feedback. I found two individuals who closed more issues than anyone by far out of close to eighty. I looked at and analyzed their issues carefully to see if there was a pattern of possibly closing issues prematurely or by using some trick or technique. I found nothing. I spoke with these two individuals, Naghma from our India office and Jose from our Barcelona office. I interviewed them trying to find out if they had some technique or system to attain such high numbers and excellent customer satisfaction. What I found instead was a genuine commitment to the work, their teams, the company, and the customers. Naghma summed it up by saying, "When a customer hangs up the phone after speaking with me, I want him to smile about the great service he just received." Jose, on the other hand, told me, "I take as many issues as possible and in each one I make the customer feel like he is the only issue and customer I have." How is that for a fulfilling job?

■ **Tip** On their deathbed, people never wish they worked more, only that they enjoyed it more.

Look Out for Your Company

"The company is number one!" Have you ever heard anyone say this before? I certainly never have. No company would gain new customers saying that they are the priority and not the customer. This is one of those complex principles that require some explanation.

I am not suggesting that the customer is not important. Customers are the reason a company is in business, but in the end, the priority of the company is to make money. We as technical support people should never lose sight of that important fact. Technical support also plays a vital role in the company staying in business. There are ways to take care of both constituencies at the same time.

All other things being equal, a company needs three things to stay in business. These are the following:

- Revenue from sales or licensing that exceeds expenses
- Control of expenses
- The continual development of revenue

Where does technical support come in? Support people may view themselves as just a cost center or expense to the company. Yes, technical support is a cost of doing business, but it can also be instrumental in controlling expenses and helping generate revenue. But, just how can we as technical support people help generate revenue? We can do this in four ways:

- Assessing gaps in the customer's environment that our products can meet
- Identifying educational or training needs
- Suggesting trials of new software to the customer
- Making sure the customer's product or technology is in compliance with licensing and maintenance

The information gleaned from these four activities should then go to someone who handles sales leads or to sales people directly. The generation of leads is not commonly the realm of technical support. Nevertheless, when you consider that technical support people speak with so many customers and typically become very familiar with the customers' level of knowledge and their technology needs, it only makes sense to have technical support people generating leads.

As customer-facing professionals, we are in a very unique situation because we know the customer's needs and wants. When customers speak with us, they don't have the same attitude as they have with sales people and are typically more open to suggestions and feedback. This is our strength and a great opportunity to add value to our jobs. This value does not have to be a formalized addition to our job description. It can merely be an ingrained desire to recognize the potential of adding value to our companies while in the process of servicing our customers. In a way, we are helping ourselves by helping our company in the process of helping our customers. It is a win-win situation for everyone involved, and it starts with technical support.

Have you ever had a call where the customer knows nothing about the product and calls in expecting a product tutorial? Referring that customer to the education department or training sales would be the ideal outcome of such a call. I often hear colleagues complain about customers who insist on being "trained" during tech support calls. I am sure we have all gone through that process in the early stages of a product or customer life cycle. We really cannot blame the customer for wanting to learn from the experts. We did it also when we came into the job. The junior support colleagues learn from the senior ones. It's only natural and the normal process of knowledge transfer. However, when it happens with customers, our companies can benefit by selling that inexperienced customer the training they need.

The same thing goes for product deployments, services, and customized solutions. I argue that technical support is an untapped resource for generating new revenue. I've rarely been in a situation where technical support people offered me new ways to spend money with them, even when it would benefit me in getting my needs met. Companies that use this vast resource to their advantage will inevitably save money in lead generation and maximize the revenue generation per customer, all while meeting the customer needs.

I have spoken with clients who even offered to provide me with a credit card number if I only could sell them one of our other solutions. They did not want to have to speak with a member of the sales force; they just wanted the solution on the spot. The same thing goes for maintenance contracts and renewals or even new licenses. Having support people selling is probably too aggressive an idea to pitch to our management and might seem like piling too much on the backs of support professionals. Nevertheless, companies must increase revenue wherever possible and technical support should be a revenue-generating entity, not merely a cost center. We can start by generating leads to help our companies make money. When our company enjoys financial stability and revenue growth, everyone benefits.

Controlling expenses is another aspect of technical support work which is not openly discussed, but one where it's very easy to lose money. I am not referring to cutting costs in technical support itself. Although it may seem appealing, cutting resources from technical support professionals may hinder their ability to effectively do their jobs and serve customers. I am specifically referring to cutting expenses in what we provide to our customers and in the time spent chasing answers that should be readily available. What is needed is a way to make support so efficient that there are no wastes and all efforts go into the real nature of the work, which is solving customers' problems and not in mundane tasks that sidetrack the support professional.

Suppose a customer calls in for support and does not know whether or not he has maintenance? The technical support person may or may not know and unless there is a good system of contract verification, it may be hard for the technical support person to deny the customer help. This is a very business critical area where support people can help keep costs down for the company. Then there is the mundane task of shipping replacements out to customers or the even more mundane tasks of having to create such replacements. Regardless of whether it involves duplicating a CD or packaging and shipping a replacement part, do we really want a support professional whose job it is to solve problems wasting time for tasks that can be done by a good system or an administrative assistant? Task ergonomics presents an opportunity where support can save costs and help add to the bottom line.

Next time you think about your work and company, know that it's in all of us to look out for our respective companies. In a way, when we put our company first we are putting our well-being on the forefront also.

■ **Tip** Think of your company like a treasure that can easily be wasted and do everything possible to protect it and help it grow. After all, you are part of it.

Tell It Like It Is

Should a customer be told the truth, even if it's not what he or she wants to hear? Should the supporter sugarcoat the message so as not to upset the supported? If the demands of the customer are ridiculous or impossible, should he be told so? Where exactly does customer service end and technical support ethics take over? These are questions that every support person faces, but are not defined in most support guidelines and policy. How then do we decide how far we can go in our sincerity?

Sincerity in technical support can carry good and bad consequences. If we are very sincere and let the customer know of our shortcomings, we risk sending the customer to the competition. If we are not sincere to the customer and just say what the customer wants to hear, sooner or later the truth will come out and we will lose our credibility. In our line of work, credibility is our greatest asset and we cannot risk losing it ever. When we lose the customer's trust, it will be very hard to get it back. Without it, nothing we can do will satisfy the customer.

Credibility is the only true advantage we have from the first moment we pick up the phone with a new issue. The customer looking for technical help calls the support department because there is an inherent trust that the person providing the help knows what he or she is talking about. There is an implied competence and sincerity that weighs on the support person by definition. No customer would call a helpdesk expecting to be lied to or to have someone sugarcoat the truth. The caller expects an expert and also expects to believe every word that expert says. By the same token, the support person must go into every issue with the intent to live up to that expectation. But how far we do we take it and what are the benefits to our company?