

ATVendor

Technical Support Training

Student Guide

(Modules 1 and 2)



Overview of Lesson Sequence

Module 1: Gathering information from the customer over the phone

Lesson 1: Gathering customer data using a system ID (pg. 4)

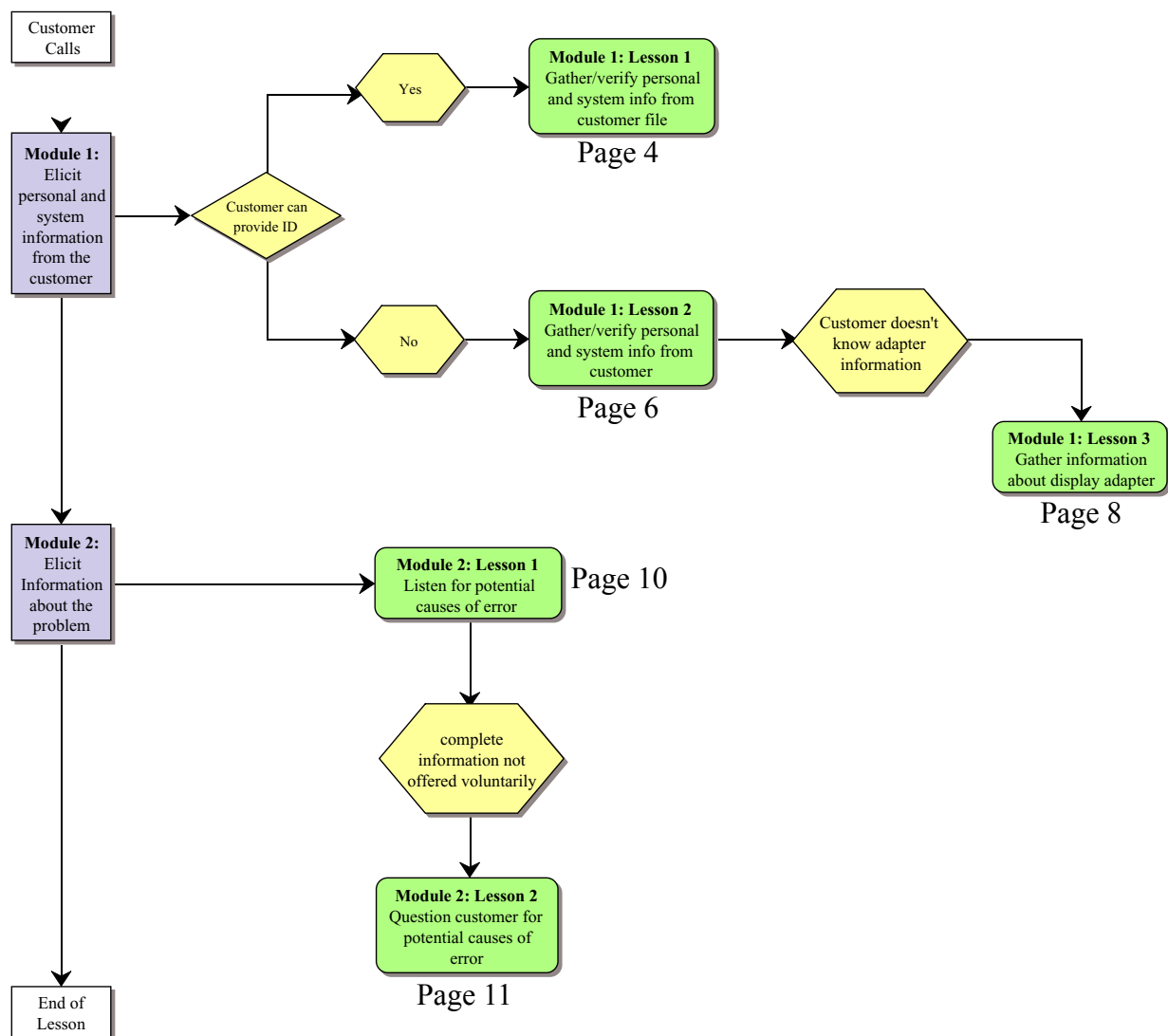
Lesson 2: Eliciting contact and system information directly from the customer (pg. 6)

Lesson 3: Eliciting the brand and model of the display adapter from the customer (pg. 8)

Module 2: Gathering information about the error

Lesson 1: Listening for potential causes of error (pg. 10)

Lesson 2: Questioning the customer for details surrounding the error (pg. 11)



Introduction

This instruction consists of two modules, encompassing 5 lessons. The lessons will present scripts that you can follow to gather personal and system information from the customer as well as information regarding the problems being encountered and the applications causing those problems. The lesson will demonstrate professional phone etiquette and allow you to participate in several mock phone calls to develop mastery. With the information gained through these modules, you will then be able to determine the proper sequence for troubleshooting the problem or deciding if the problem needs to be sent to higher level technical support personnel.

This student guide will direct you through much of the training. You will also be engaged in discussions and provided demonstrations of the various errors that may be encountered. Subsequently, you will utilize a computer to practice the steps from the perspective of the customer. Then you will have an opportunity to practice interacting with an actor (customer) over the phone.

While each lesson is designed to last only about 10 or 15 minutes, the actual amount of time will vary depending on your familiarity with troubleshooting; the number of people that are able to take the training at any given time; and the number of questions in each session. To participate in these lessons, you will be provided with a writing utensil, paper, and the student guide on CD-ROM. The employer will provide you with these materials at no charge.

Module 1:

Gathering information from the customer over the phone

Lesson 1:

Eliciting contact and system information
from the customer using a system ID

Overview

(Module 1 - Lesson 1)

Lesson Goal: Learn to use the customer ID to locate the appropriate information in the system.

Purpose of lesson: This lesson is designed to instruct you in accessing customer information as quickly as possible, without having to ask the customer to provide personal information unless absolutely necessary.

Synopsis of Lesson: The lesson will explain the use and location of the ATVendor system ID, then demonstrate how to find the customer's file on the system based on this ID. You will be able to practice by participating in a mock phone call.

Following are some very specific scripts to guide you in getting information about the customer and the computer they are using, provided that the customer is able to find their ATVendor ID. All computers shipped from ATVendor have an ID associated with them. Using this ID is the easiest way to get comprehensive information about the customer and the computer. Attempt to have the customer provide you with this ID before trying other means. After getting the ID, verify that you have found the correct file and that the information is current. Use the following guide:

1. Have the customer provide the ID.

Say: "Would you please read the ATVendor ID. It is located on the Start Menu as well as on the side of the computer."

2. Get all the customer and system information based on this ID. Note: Each customer has their own PDF file containing all documents related to their system. The file will bear the name of the ID on their system. It is located in the X folder. These files contain the customer's name, e-mail, phone number, operating system, display adapter, and pre-installed software.

3. Verify that this information is correct.

In order to troubleshoot the system, you need to have accurate and current information. Say: "I have your e-mail address as [E-MAIL ADDRESS] and your phone number as [PHONE NUMBER]; is this correct?" If the number is correct, go to page 10; otherwise, go to page 6.

Created By: DM ATVendor Page: 1 of 1
Scanned By: _____ Desktop Configuration Sheet

Date: Sept 19/05 Client: John Doe System #: 142478
Contact: Jane Doe Phone: 416-555-4556
Retail Model #: Touch Serial #: 75012
Motherboard Model #: Asus P4P800 SE
CPU: Intel P4 3.06GHz BIOS Ver: 800209 - 4/30/2005 IP Address: DHCP
OS: WIN XP HOME Computer Name: JohnD-142478 Wkgrp/Domain: MSHOME
NIC1 Driver: Marvell 729.4.3 - 11/20/2004 NIC2 Driver: _____
Video Driver: Nvidia 77.77 Audio Model: Creative SB Audigy 2
Mouse: intellimouse Port: PS2 _____
Keyboard: INTERNET Port: PS2 _____
Memory: Total: 1024MB Type: 2K 512MB PC3200 Avail. Slots: 2
FDD A: 3 1/2 floppy Prim IDE Master: _____ Sec IDE Master: LG CORN
FDD B: _____ Prim IDE Slave: _____ Sec IDE Slave: DVD ROM
RAID: _____ SATA 1: 160GB SATA 2: _____
Slot 0: Style: AGP Description: Asus 9520-nvidia Geforce FX 5200 128MB
Slot 1: Style: PCI Description: _____
Slot 2: Style: PCI Description: US ROBOTICS 56K DATA/FAX 2973 Modem
Slot 3: Style: PCI Description: _____
Slot 4: Style: PCI Description: CREATIVE SB AUDIGY 2 VALUE
Slot 5: Style: PCI Description: _____
Slot 6: Style: _____ Description: _____
Slot 7: Style: _____ Description: _____
Bays (Total/Available): Int 3.5: 2/1 Ext 3.5: 1/0 Ext 5.25: 4/2 Int 5.25: 0
Windows XP HOME CD Key: _____
Office 2003 S&T CD Key: _____
Dragon NS Prof 8 CD Key: _____
Text help r & w 7.1 CD Key: _____
Norton Sys. Works CD Key: _____
Monitor: Viewsonic E705 17" Serial #: _____
Printer: hp deskjet 6540 photo Port: USB Serial #: _____
Other: dana by alphamart Port: USB Serial #: _____
Mouse Pad: Red Power Bar: Blue Diamond Speakers: Altec Lansing Paper: _____
Notes: _____

Figure 1

Module 1:

Gathering information from the customer over the phone

Lesson 2:

Eliciting contact and system information
from the customer who does not have a system ID

Overview

(Module 1 - Lesson 2)

Lesson Goal: To instruct you in how to use professional phone etiquette to gather contact and system information from a customer when they do not provide a system ID.

Purpose of lesson: This lesson is designed to direct you to appropriately request personal and system information from the customer when the customer file cannot provide that information.

Synopsis of Lesson: The lesson will explain why it is necessary to gather specific information from the customer. This information includes the customer's name, phone number, e-mail address, operating system, and display adapter. You will have the opportunity to practice gathering this information by participating in a mock phone call.

If the customer is unable to locate their ID and cannot provide enough information so that you can locate their file, you will need to get basic contact information and verify that it is correct. By gathering basic contact information, ATVendor is able to keep a record of who is calling and how often. It helps ATVendor to determine whether or not specific systems are experiencing an unusual number of problems that may be indicative of issues with the configuration. It also allows ATVendor to follow up on calls to determine customer satisfaction. This information is necessary if the call is passed on to a higher level technical support or if the call has to be returned. Below is specific wording that will help you to make sure that you have all the information you will need.

Follow these steps to get contact information:

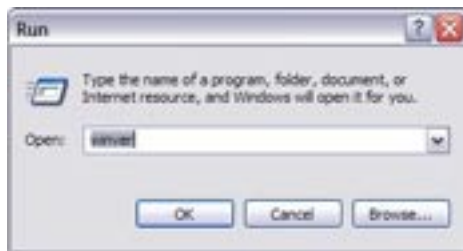
1. Ask the customer for his or her name.
Say: "May I have your name?"
2. Ask the customer for his or her phone number.
Say: "And may I have your phone number?"
3. Ask the customer for his or her e-mail address.
Say: "I will also need your email address."
4. Ask the customer for the operating system.
Say: "What operating system are you using?" If the customer is unable to determine the operating system, use the following procedure:

Say: “To determine which version of Microsoft Windows you are running, do the following:

a. On the taskbar at the bottom of your screen, click Start, and then click Run.



b. In the Run dialog box, type: winver3.



c. Click OK. A dialog box displays the version that you are running. Please give me that information.”



5. Ask the customer for the brand and model of the computer.

Say: “What is the brand of computer you are using?”

6. Ask the customer for the brand and model of the video card/display adapter .

Say “What is the brand and model of your display adapter?” If the customer does not know, or cannot determine this information, go to page 8.

On your computer, try to determine the operating system using the method outlined above.

When you are on the phone with a customer, follow the scripts above, making sure to get the customer’s name, phone number, e-mail address, operating system, and display adapter.

Module 1:

Gathering information from the customer over the phone

Lesson 3:

Eliciting the brand and model of the display adapter from the customer

Overview

(Module 1 - Lesson 3)

Lesson Goal: To discuss the use of professional phone etiquette to gather display adapter information in the most efficient manner possible when a customer is unable to provide this information and to indicate why it is important to gather that information.

Purpose of lesson: This lesson is designed to direct you to appropriately request display adapter information from the customer when the customer's file cannot provide that information.

Synopsis of Lesson: This lesson will explain why it is important to gather information about the display adapter as well as the proper steps to get this information as efficiently as possible. You will have a chance to practice gathering this information by participating in a mock phone call.

You were asked previously to have the customer provide the brand and model of the display adapter. Many customers will be unable to provide this information; therefore we will explore the proper steps to gather this information. Adaptive technologies, such as screen readers and magnifiers locate the display driver, get the information needed for it, then pass the sometimes modified Display Driver Interface (DDI) calls to the original display driver. These technologies may be compatible with some adapters, but not others. It is therefore important to gather information about the display adapter.

1. Have the customer go to the control panel.
Say: "In the Windows Start menu, select Control Panel."



2. Have the customer open the display properties window.
Say: "In the Control Panel window, double-click Display."



3. Have the customer select the Advanced button.
Say: "In the Display Properties dialog box, select the Settings tab, then click the Advanced button."



Say: “A new dialog will appear that contains your video adapter settings. In this dialog, select the Adapter tab.”

Say: “The name and model of your video adapter appears in the box labeled Adapter Type. Would you please read this to me.”

Color Management **GeForce Go 6200 TE 64M / 6600 TE 128M**

General **Adapter** Monitor Troubleshoot

Adapter Type

 NVIDIA GeForce Go 6200 TE 64M / 6600 TE 128M

[Properties](#)

Adapter Information

Chip Type: GeForce Go 6600 TE/6200 TE
 DAC Type: Integrated RAMDAC
 Memory Size: 64 MB
 Adapter String: GeForce Go 6600 TE/6200 TE
 Bios Information: Version 5.43.02.49.E2

[List All Modes...](#)

OK Cancel Apply

AT Vendor Call Record

(Student answer Sheet for Module 1)

Module 2:

Gathering information about the error

Lesson 1:

Listening for potential causes of error

Overview

(Module 2 - Lesson 1)

Lesson Goal: To provide information about the types of content you need to listen for when speaking to a customer.

Purpose of lesson: The lesson is designed to instruct students in the types of information they will need to listen for as the customer describes the problem. This will help promote good customer relations and save time and frustration generated when the customer is asked to repeat information.

Synopsis of Lesson: This lesson discusses the things to listen for as the customer describes the problem, the program generating the error, the frequency of the error and the circumstances surrounding the error.

Here, we will discuss techniques for listening for the potential causes of the error. Gathering the necessary information through listening can save you a lot of time. It also prevents the customer from having to repeat information; they will therefore be less frustrated by the process.

1. Listen for the program generating the error.

The customer will often give some indication of the program that caused the error. Listen for any hint of what program they were using when the error occurred. The error may be related to one program or could be a conflict between two or more programs. If the customer does provide sufficient information about the program that is causing the error, get this information as indicated on page 11.

2. Listen for what happened when the error occurred.

Errors may occur consistently or may appear intermittently. Try to determine if the customer has witnessed a pattern, that is, have they noticed any link between what they are doing and what is causing the error. If the customer does not provide this information, get this information as indicated on page 11.

3. Listen for how many times the error has occurred.

It will be helpful to know if this is the first time the error has occurred or if it has been ongoing and the customer has only now called for support. This will also give you some insight into the customer's attitude. If the problem has been ongoing, the customer may already be frustrated, and it will be important for you to focus on being positive and patient. If the customer does not provide enough information about the error, gather additional information by following the steps on page 11.

Module 2:

Gathering information about the error

Lesson 2:

Questioning the customer for details surrounding the error

Overview

(Module 2 - Lesson 2)

Lesson Goal: To discuss the use of professional etiquette when gathering information from the customer regarding the errors with an application.

Purpose of lesson: This lesson is designed to instruct the learner in the use of professional etiquette when working with a customer to determine the specifics of an error.

Synopsis of Lesson: In this lesson you will use a script to gather error details, such as the name of the program generating the error, the version of the program, the context of the error, and the specific message received. You will then have an opportunity to follow a script to practice using professional etiquette to gather this information.

If the customer does not provide the necessary information initially, you will have to ask several questions to determine what application or combination of applications is responsible for the error. There are specific questions you can ask to determine the cause of the problem, but you may need to ask more specific questions based on the responses from the customer. These are the questions you must ask to every customer.

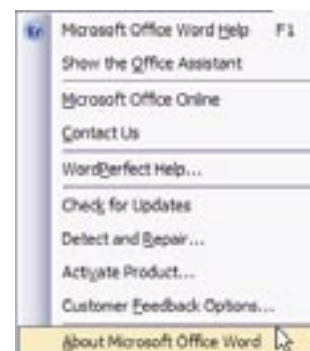
1. Discover the name of the program that caused the error.
Say: "What program were you using when the error occurred? What other programs were running at the time the error occurred?"

2. Discover the version of the program that caused the error.
Say: "What version of [the program in question] are you using? This information is available by choosing About in the Help menu of [the program in question]."

3. Discover the context of the error.
Say: "What were you doing when the error occurred?"

4. Discover any error messages that were reported.
Say: "What error message was reported?"

During a phone call with the customer, follow the script and then ask any other pertinent questions you feel are necessary. It is important to always be polite and respectful.



Use the following table to record information from the mock phone calls:

AT Vendor Call Record (Student answer Sheet for Module 2)	
Program(s) using when error occurred:	
Version of program(s):	
Activities surrounding error:	
Error messages:	
Frequency of error:	
Other programs running at the time:	