**Customer Service & Incident Management Toolkit**

This toolkit will show how we can manage service escalations, maintain user satisfaction, and handle real problems like outages or user account issues. The purpose of this toolkit is to streamline the process of handling customer issues, IT service disruptions, and incident reporting.  
The following are the general components for handling a customer issue

1. Your customer service statement.
2. Escalation flowchart.
3. Sample ticket response.
4. Incident report template.

**Customer Service Standards Statement (1 Page)**

**My Personal Customer Service Philosophy in IT Industry**

In IT business, I do not think that excellent customer service is only when there are technical issues being solved. It is the idea of having a reliable and respectful experience of each user. My philosophy can be described as the ability to provide timely and technically correct help and guarantee every customer the sense of having been understood and appreciated. My principle is to treat all people empathetically because I know that they are individuals with issues requiring technology to work or attain a set of goals.

My practice is based on clear communication. I also endeavor to simplify the technical solutions information that may be complex, and it is always easy to comprehend the customer by not using any jargon that would rather frustrate the customer. My mission will be based on creating trust by being transparent and responsible and responsive to every user, which would mean that they not only feel that their problem was solved, but that they also feel more trusting of our systems and support process.

I am always trying to create a better service by writing down solutions, studying incidents, and finding recurring problems. Such a proactive attitude means less issues in the future and reinforces the support infrastructure in general. Finally, I would view all customer relations as a chance to address a challenge but also to enforce the importance and honor of our IT services.

**📊 2. Escalation Matrix / Flowchart**

**IT Support Escalation Flowchart (Tiered Support)**

You can use this flowchart as-is on your site or download it as a PNG/PDF.

A diagram of a tier system

AI-generated content may be incorrect.

**3. Sample Helpdesk Ticket Response (1 Paragraph**  
  
Subject: RE: Internet Not Working

Hello Rohan,

Thanks very much for contacting and I am sorry that your email is causing you difficulties, they certainly can be a pain, particularly when a task requires the use of it. Having checked through account, I have confirmed that your mailbox is open and not over quota. The next action that I would suggest is to attempt to check your email through webmail so that you can confirm whether the problem lies with email desktop or the mobile client.

Should it continue, I would bump up your ticket to our technical expert who would conduct a more thorough check on your mail delivery logs and device set ups. You may notify me about any error messages that you see or new changes to your system. It takes us this long because we are here to see this resolved.

In case you may get some error messages, or it is affecting other gadgets please update us. Once again, thank you on your patience and we will get you online shortly.

Best regard  
Abraar Uddin

IT Helpdesk Support

**4. IT Helpdesk Incident Report Form**

**Incident Title:** Email Not Working – User Access Issue  
**Ticket ID:** #IT-2025-061  
**Date Reported:** June 21, 2025  
**Time Reported:** 9:45 AM  
**Reported By:** Rohan (Rohan123@company.com)  
**Department:** Marketing

**What Happened:** The user reported being unable to access their email account via both desktop client (Outlook) and webmail. An error message indicating “Cannot connect to server” was shown.

**Who Was Involved:**

AffectedUser**:** Rohan

Tier1: Abraar Uddin

Escalatedto Tier 2**:** Mark Rivera

SystemAdmin (Tier 3)**:** [Not Involved – issue resolved at Tier 2]

**Impact on Systems/Users:**

Only one user was affected.

No widespread outage reported.

Business communication delay for the marketing team.

**Response Actions Taken:**

**Tier 1:** Verified account status, confirmed mailbox was active and within quota, guided user to test webmail access. Issue persisted.

**Tier 2:** Investigated user’s mail delivery logs, identified a firewall block on outbound port 993 (IMAP SSL).

Port was unblocked and client reconfiguration was done.

Email access restored successfully.

**Resolution Timeline:**

| **Step** | **Time** |
| --- | --- |
| Ticket Received | 9:45 AM |
| Tier 1 Response Completed | 10:05 AM |
| Tier 2 Escalation & Fix | 10:45 AM |
| Email Access Restored | 10:50 AM |
| User Confirmation of Fix | 11:00 AM |

**Status: ✅ Resolved**

As seen in real-world scenarios such as the 2023 Microsoft Outlook outage, firewall misconfigurations and server updates are often the root causes of email disruptions (Microsoft, 2023).

Resolution Date: June 21, 2025  
Follow-up Needed**:** No

**Ticket ID:** #IT-2025-061 Closed

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The Approval of Supervisor  
Name: Abraar Uddin  
Date: 06/21/2025

**Real-World Example :**

In January 2023 Microsoft Outlook users suffered a worldwide outage due to their inability to send and receive emails via desktop and mobile clients. Microsoft went in and diagnosed this as a change to the network configuration, which was reversed hastily. It was fixed within less than four hours, and Microsoft provided constant updates on their website, which is Microsoft 365 Status Page (Microsoft, 2023).

This is the same case when mail connectivity problems are investigated by internal IT teams, checking firewall rules, mail logs on the servers, and publicized rules which is just what happened to the user named Rohan in the above report.

**APA In-text Citations:**

Email outages often occur due to client-side misconfigurations, firewall blocks, or server-side issues (Cisco, 2021).

An effective incident management system ensures user satisfaction and minimizes business disruption (ITIL Foundation, 2019).

Tiered IT support models enhance efficiency by handling simpler issues at lower tiers and escalating complex incidents (Axelos, 2020).

**References (APA 7 Format):**

Axelos. (2020). *ITIL Foundation: ITIL 4 Edition*. TSO (The Stationery Office).

Cisco Systems. (2021). *Troubleshooting email delivery and connectivity*. Retrieved from <https://www.cisco.com/c/en/us/support/docs/email>

Microsoft. (2023, January 25). *Outlook email outage: Status update and resolution*. Retrieved from <https://www.microsoft.com/en-us/microsoft-365/service-status>

Office of Government Commerce (OGC). (2019). *ITIL Service Operation: Best Practices*. The Stationery Office.