

## Standard Operating Procedure (SOP): Performing Support Engagements/Interactions

### 1. Purpose:

The purpose of this SOP is to establish a standardized process for performing support engagements and interactions with users, ensuring prompt and effective resolution of technical issues and providing exceptional customer service.

### 2. Scope:

This SOP applies to all personnel involved in providing technical support and engaging with users or customers for issue resolution within the organization.

### 3. Responsibilities:

- Support Team: Responsible for engaging with users, diagnosing technical issues, and providing timely and accurate resolutions.
- Help Desk Manager: Oversees the support engagements and ensures adherence to the SOP.
- Technical Leads: Provide guidance and expertise to support team members as needed.
- Users/Customers: Responsible for reporting issues, providing accurate information, and collaborating with the support team during the engagement process.

### 4. Prerequisites:

- Familiarity with the organization's products, services, and support tools.
- Knowledge of customer service best practices.
- Effective communication and active listening skills.

### 5. Procedures:

#### 5.1. User Engagement:

- Promptly respond to user inquiries or support requests through the designated communication channels (e.g., phone, email, ticketing system).
- Greet the user professionally and establish a positive and helpful tone.

#### 5.2. Issue Identification and Documentation:

- Ask probing questions to gather necessary details about the reported issue.
- Document the user's contact information, issue description, and any troubleshooting steps already attempted.

#### 5.3. Issue Diagnosis and Troubleshooting:

- Utilize appropriate tools and resources to diagnose the issue.
- Follow established troubleshooting methodologies (refer to the organization's troubleshooting SOP) to systematically identify the root cause.
- Communicate the troubleshooting steps to the user, explaining the rationale behind each step.

#### 5.4. Issue Resolution:

- Provide a clear and concise resolution plan to the user, including estimated timeframes and any required actions on the user's part.
- If a resolution cannot be provided immediately, set realistic expectations regarding the timeline for further investigation or escalation.

#### 5.5. Knowledge Base and Documentation:

- Document the details of the user's issue, resolution steps, and any additional notes in the organization's knowledge base or ticketing system.
- Ensure the knowledge base is regularly updated with new resolutions and best practices to facilitate efficient support engagements in the future.

#### 5.6. Follow-Up and Closure:

- Verify with the user that the issue has been resolved to their satisfaction.
- Provide any necessary post-resolution instructions or recommendations.
- Close the support ticket or engagement, ensuring all relevant information is properly documented.

#### 6. References:

- Organization's customer service guidelines.
- Troubleshooting methodology SOP.

#### 7. Definitions:

- Support Engagements/Interactions: Interactions between support personnel and users/customers to resolve technical issues and provide assistance.

#### 8. Revision History:

- Version 1.0: [17MAY2023] - [David Siebert]
  - Initial draft of the SOP.
- Version 1.1: [Date] - [Contributor Name]
  - Incorporated feedback from stakeholders.
  - Added section on knowledge base and documentation.
- Version 1.2: [Date] - [Contributor Name]
  - Reviewed and refined the SOP for clarity and comprehensiveness.