**Meeting with IT Leader - Opportunity Exploration Cheat Sheet**

**1. Opening & Self-Introduction**

* "Thank you for meeting with me today. I really appreciate the opportunity."
* "I’m currently a Deputy Manager in the Customer Service team. Alongside my operational responsibilities, I’ve developed tools to improve our team’s efficiency."
* Although my role is not officially technical, I’ve taken the initiative to apply tools like VBA and Excel to address recurring challenges.”
* "My degree is in electronics, not IT, but I’ve self-learned SQL, MS Access, Excel VBA, HTML/CSS, and dashboard/database design while working in FRM and Asian CS."
* "I really enjoy solving real business problems through system design and automation — it’s something I’m passionate about."
* “The purpose of this meeting is to share some of the work I’ve done in my current role and to get your feedback on how my skillset might align with opportunities in your team.”
* “I’ve been interested in transitioning into a more technical role, and I thought it would be helpful to walk you through some of my key contributions so far.

**2. Key Projects to Highlight**

1. TL Assistant Tool

“This tool, built in MS Access, helps Duty TLs and Supervisors manage shifts more effectively by extracting data from rota systems like NICE and organising it into a structured, filterable view. It automatically assigns break/meal times based on the tasks scheduled and allows live updates to payment limits — all designed to prevent service disruption and increase visibility.”

🎯 Skills to highlight:

Data extraction and organisation

Automation logic for time assignments

User-friendly interface design

Backend logic with Access/VBA

🔹 2. Task Assistant Tool

“Also in MS Access, this tool was designed to streamline repetitive advisor tasks. It includes ID verification, email template management, a settlement query module linked to betslip IDs, and an internal information board that provides real-time task and break updates. It’s aimed at reducing task time and standardising processes.”

🎯 Skills to highlight:

Task automation

Interface and workflow optimisation

Use of Access forms, queries, macros

🔹 3. Agent Performance Tracker

“This performance dashboard allows managers and TLs to monitor metrics like chat handling, lateness, refusals, etc. It provides historical data and team comparisons, and generates dynamic HTML reports — instead of using Access's built-in reports — to ensure broader compatibility and a cleaner format.”

🎯 Skills to highlight:

SQL queries (if used)

HTML generation from Access

Trend analysis and reporting

🔹 4. Team Development Hub

“This Excel-based hub centralises team development data — coaching, PDPs, contact review stats, and TD planning. It’s used by leaders to plan, review, and upload records, and features a dashboard view of contact review performance and TD slot allocation.”

🎯 Skills to highlight:

Dashboard design in Excel

Workflow mapping

Data tracking and organisation

🔹 5. Asian CS Website Issue Report Dashboard

“This Excel dashboard helps us visualise and analyse website issues, identifying patterns by region or ISP. It helps the management team make faster, data-driven decisions when resolving platform issues.”

🎯 Skills to highlight:

Data visualisation

Pattern recognition

Dashboard storytelling

**TL Assistant Tool (MS Access)**

* Visual shift planner for TLs/Supervisors
* Automates task assignment, break/meal slot allocation, and payment method limit tracking

**Task Assistant Tool (MS Access)**

* Advisor tool for template management, settlement queries, ID verification, and website issue handling
* Features inboard with break/task visibility

**Agent Performance Tracker (MS Access)**

* Tracks weekly KPIs (e.g., lateness, chats, emails)
* Exports HTML performance reports for leaders

**Team Development Hub (Excel)**

* Upload site for coaching docs, PDPs, contact review outcomes
* TD slot planner, escalation tracker, and staff profile updater

**Asian CS Website Issue Dashboard (Excel)**

* Identifies regional/ISP patterns for issue reporting

While I’ve been in a customer service management role, these projects have allowed me to gain hands-on experience with data, automation, and tool building — areas I’m very passionate about. I’d love to explore how these technical skills could be applied and expanded further in an IT role, particularly in areas like SQL, dashboard creation, or workflow automation.

**✅ Professional Response (Core Message)**

*"I completely understand that tools like MS Access and Excel might seem a bit dated in modern IT environments. But in our CS team, these are the only development tools available on our machines — we don’t have access to more advanced platforms or admin rights to install new software. That said, I’ve taken full advantage of what’s available to automate and improve real processes in our department. My goal has always been to solve business problems with what’s at hand."*

**🧠 Add Your Strategic Thinking**

*"My use of Access and Excel isn’t because I don’t know better tools — it’s because those are the only approved or accessible tools for us. If I were in an environment with Power BI, Python, or database servers, I’d be excited to work with those too. I’ve already done some learning on my own, like using Python for web scraping, and I’m confident I can quickly pick up more advanced tools."*

**💡 Optional Closing Line (Show Growth Mindset)**

*"I actually see this as a strength — I’ve been able to deliver real automation and structure with limited resources. So if I had access to modern platforms, I’m sure I could deliver even more impactful tools in less time."*

**3. Technical Learning & Passion**

* "All tools were built through self-learning."
* "I taught myself by solving practical problems."
* "I’ve dabbled in Python, using it for personal web scraping."
* "I’m confident in picking up new tools/languages quickly due to my system-thinking mindset."
* "Most of all, I genuinely enjoy doing this work."

**4. Expressing Interest**

* "I’d love to be considered for any roles that involve SQL, automation, dashboarding, or data solutions."
* "I understand a transition from CS to IT might mean starting at a different level — I’m okay with that if it gets me on the right path."
* Based on what I’ve shared, do you see any overlap between the work I’ve done and the needs of your team?
* Are there any areas where you think I could strengthen my technical capabilities to better align with roles in your team?

**5. If Only Junior Role Is Available**

* "I’m open to a junior role if it allows me to grow technically and contribute meaningfully."
* "If there’s room for review after 6–12 months or recognition of past experience, I’d appreciate that consideration."

**6. If Asked About Salary**

* "My current salary is aligned with my CS management role. I’m open to adjusting if the opportunity supports my long-term development."
* "Could you share how salary progression typically works in your team, or if there’s a review mechanism in place?"

**7. Smart Questions to Ask**

* "What are your team’s key priorities this year?"
* "What tools or tech stack do you use most often?"
* "Is there a mentorship or onboarding program for new joiners from other departments?"
* "Does the team support learning opportunities or certifications?"
* "How do you manage project ownership or internal tool suggestions?"

**8. Closing the Meeting**

* "Thank you again for your time today."
* "I’d be happy to provide samples or further documentation of my work."
* "I’d really appreciate being considered for any relevant openings — even junior — and I’m eager to contribute."
* "Looking forward to staying in touch."

**✅ Step 1: Express Gratitude**

“First of all, I really appreciate you considering me for the opportunity and taking time to explore where I could fit within the IT team.”

**✅ Step 2: Show Willingness but Clarify Your Readiness**

“I understand that the current opening is for a junior role, and I’m open to starting where the team feels is most appropriate. That said, based on the tools and systems I’ve independently built and my experience solving real business needs, I believe I may already be operating at a level closer to a standard software engineer.”

**✅ Step 3: Present Supporting Evidence (Subtly)**

“For example, in my current role I’ve designed complete database-backed tools in Access, implemented automation using VBA and HTML, and worked with SQL for reporting and analysis. I’ve also built dashboards that are used daily by CS leaders to drive decisions. These are end-to-end solutions that required me to understand user needs, design logic, test, and maintain the tools over time — similar to what an engineer would do.”

**✅ Step 4: Suggest a Compromise (Growth Path)**

“Would there be room to discuss a structured progression path — perhaps starting in the junior role, but with clear checkpoints or expectations that could lead to a mid-level position within a defined timeframe if I perform at that level?”

**🔄 Optional: If You’re Willing to Be Flexible on Salary**

“If the role requires me to take a lower salary than I currently have as a deputy CS manager, I’m willing to consider that — especially if there’s a clear growth plan. This transition is about long-term development and aligning with what I’m passionate about.”

**💬 Polite & Curious Approach**

“Would you mind sharing how the career progression typically works in your team — from a junior role to a standard or senior engineer role?”

**💬 Future-Focused Approach**

“If I were to start as a junior engineer, what kind of milestones or skill development would be expected to move up to a standard or even senior engineer role over time?”

**💬 Performance-Oriented Approach**

“What does success look like for someone in a junior position on your team? And what kind of timeframe or performance benchmarks usually lead to promotion?”

**💬 Clarity-Seeking Approach**

“Can you tell me a bit about how the IT team defines the differences between junior, mid-level, and senior roles — in terms of responsibilities or expectations?”

**💬 Long-Term Interest Approach**

“I’d love to understand the growth path within the team — how do team members typically evolve in their roles here?”

**💬 Direct & Respectful**

“Is there typically a timeframe or average duration that someone stays in the junior role before progressing to a mid-level position in your team?”

**💬 Growth-Focused**

“Assuming good performance and continuous learning, is there a standard timeline you expect for someone to move from junior to mid-level?”

**💬 Clarifying Expectations**

“Does the team have defined expectations or a roadmap for how long it usually takes to progress from junior to mid-level engineer?”

**💬 Long-Term Planning Tone**

“I’m thinking long-term — would you say the path from junior to mid-level is based more on time, performance, or a combination of both? And is there an average range for that transition?”

**💬 Proactive Tone**

“If I start in a junior position, I’d like to work toward a mid-level role. Would there be set review points or timelines to assess readiness for that step?”

**💬 General & Respectful**

“Would it be possible to get an idea of the salary range and benefits package for the roles currently available?”

**💬 Timing-Sensitive**

“At the appropriate time, I’d be interested to know more about the salary structure and benefits attached to the junior software engineer position.”

**💬 Career Transition Context**

“Since I’m considering a transition from a management role in CS to a junior technical role, could you share the salary range and benefits so I can understand the adjustment and plan accordingly?”

**💬 Open & Honest**

“I’d like to understand what kind of salary and benefits are offered for this role — just to make sure I have a full picture before making any decisions.”

**💬 After Positive Engagement**

(Use this after discussing responsibilities and showing interest)

“This sounds like a really exciting direction. Could I ask what the compensation and benefits would look like for this role?”

**TL Assistant Tool – Shift Management Solution (Built in MS Access)**

**Purpose:**  
To streamline daily shift operations for Team Leaders (TLs) and Supervisors (Sups) by turning complex rota data into a clear, actionable interface.

**Key Features:**

* **Automated Rota Extraction:** Pulls staff schedules from Rota or NICE and converts them into a structured, user-friendly format.
* **Daily Overview by Shift:** Selecting a date displays all scheduled staff, sorted by start time and job title, clearly distinguishing between in-office and work-from-home shifts.
* **Task Assignment:** Enables TLs/Sups to assign tasks using a dropdown menu. The tool then auto-generates break and meal times aligned with assignments — ensuring smooth service coverage.
* **Payment Method Management:** Allows real-time updates of payment method limits. The tool tracks and calculates current availability across methods based on these updates.

**Impact:**  
This tool has significantly reduced manual workload, improved task clarity, and helped ensure operational continuity during peak hours.

**Task Assistant Tool – Advisor Productivity Suite (Built in MS Access)**

**Purpose:**  
Designed to improve daily task efficiency for Advisors by centralizing key functions into one easy-to-use platform.

**Key Modules & Functions:**

* **Personal Templates:**  
  Enables Advisors to store both simplified and traditional Chinese response templates and switch between them with a single click, enhancing speed and consistency.
* **Settlement Support:**  
  Provides a streamlined way to look up match results via betslip IDs and submit settlement queries directly to OSS.
* **ID Verification Utility:**  
  Simplifies ID checks by extracting essential information such as date of birth and gender, helping Advisors validate customer identity quickly.
* **Website Issue Handling:**  
  Speeds up reporting by generating pre-filled email templates for website-related issues, ensuring accuracy and consistency.
* **Inboard Dashboard:**  
  Offers Advisors a real-time view of their task assignments, scheduled breaks/meals, duty supervisor info, and currently available payment methods — all in one place.

**Impact:**  
This tool has greatly enhanced workflow efficiency, reduced repetitive manual tasks, and empowered Advisors to handle queries with greater speed and confidence.

**Agent Performance Tracker – Productivity Monitoring System (Built in MS Access)**

**Purpose:**  
To provide team leaders, supervisors, and managers with a centralised platform to track and analyse advisor performance data effectively.

**Key Features:**

* **Weekly Performance Dashboard:**  
  Displays key metrics such as lateness, number of live chats handled, chat timeouts, refusal counts, average chat duration, and email/call volumes.
* **Historical & Comparative Reporting:**  
  Offers trend analysis over time for individual agents and enables team-to-team performance comparisons for broader insight.
* **Custom HTML Reporting:**  
  Instead of using default Access reports, I developed a custom HTML output feature for a more flexible and visually cleaner presentation of performance data.

**Impact:**  
The tool has significantly improved visibility into advisor productivity, enabling data-driven decisions, early identification of performance issues, and clearer team benchmarking.

**Team Development Hub – Centralised Staff Development Tracker (Built in Excel)**

**Purpose:**  
To streamline and consolidate team development efforts by providing a comprehensive workspace for tracking coaching, performance, and planning activities.

**Key Features:**

* **Dashboard Overview:**  
  Offers a clear view of contact review outcomes and progress across selected quarters, helping leaders monitor development trends and effectiveness.
* **Performance Statistics Page:**  
  Highlights contact review results, including the percentage of interactions that fall below standard — useful for identifying coaching needs at both individual and team levels.
* **TD Planner:**  
  Allows managers to efficiently schedule and monitor Team Leaders’ allocated Team Development (TD) slots each week.
* **Documentation & Record Keeping:**  
  Enables uploading and tracking of:
  + Personal Development Plans (PDPs)
  + Coaching and 1:1 meeting records
  + Contact review outcomes
  + Urgent escalations (e.g. service incidents)
  + General staff record updates

**Impact:**  
The tool enhances visibility and accountability across development activities, supports informed coaching, and improves planning efficiency for leadership teams.

**Asian CS Website Issue Report Dashboard – Incident Trend Analysis Tool (Built in Excel)**

**Purpose:**  
To help the management team track, analyse, and respond to website-related issues reported by customers, with a focus on identifying patterns and root causes.

**Key Features:**

* **Visual Data Dashboard:**  
  Presents issue reports in a structured and visual format, making it easy to detect spikes, recurring issues, and unusual patterns.
* **Geographic & ISP Trend Analysis:**  
  Allows filtering and breakdown by region, country, and internet service provider (ISP) to pinpoint localized outages or access problems.
* **Data-Driven Decision Support:**  
  Empowers teams to make informed decisions on escalation, resource deployment, or preventative action by highlighting key trends in performance and user impact.

**Impact:**  
The dashboard has significantly improved the efficiency and accuracy of issue monitoring, reduced manual investigation time, and enabled quicker response to regional disruptions.

**✅ Step 1: Express Sincere Appreciation**

“Thank you so much — I’m really glad to hear that. This is exactly the type of role I’ve been hoping for.”

**✅ Step 2: Show Excitement and Alignment**

“It really aligns with my interests and the direction I want to grow in. I’m passionate about solving real problems through tools, automation, and data — so this feels like a great fit.”

**✅ Step 3: Reaffirm Your Commitment and Mindset**

“I’m excited to contribute to the team and keep learning. I’ve always been very hands-on and love figuring things out by doing — I’m confident I can hit the ground running and bring value.”

**✅ Optional – Clarify Next Steps**

“What would the next steps be from here? Is there anything I should prepare or provide following this meeting?”

**🔄 Optional (if salary or formalities haven’t been discussed yet):**

“Also, will there be a follow-up conversation regarding the offer details like salary and start timeline?”

**💬 Polite and Flexible Response**

“I’m happy to start as early as possible. However, since I’m currently in a deputy manager role in the CS team, I believe my release date will need to be discussed and confirmed with my current manager.”

**💬 Supportive of Transition Planning**

“I’m ready and eager to get started soon, but I also want to ensure a smooth handover in my current team. So I think the best approach would be for your side to coordinate with my current manager to agree on a suitable transition date.”

**💬 Open and Collaborative**

“I’m quite flexible with the start date and would like to align with whatever timeline works best for both teams. I trust my current manager and your team leader can sort out the most suitable release plan.”