**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."