

By Jeff Dray

Visiting a customer's workplace represents a considerable investment in time and resources. As field engineers, we must take great care to derive the maximum value from these each visit and make certain our time and the customer's time isn't spent in vain. From personal experience, I have compiled the following list of techniques and routine tasks I perform whenever a support call takes me to an external location. It isn't always possible to avoid a return visit, but hopefully these methods will keep them to a minimum.

- 1 Verify the visit is necessary** – Make sure you fully understand the reported problem and the customer's request. You will waste time by flying off at a tangent. If you didn't originally take the customer's complaint, contact the customer before you leave. More than once, I have been dispatched on a less-than-accurate problem description. Call ahead, and you might save yourself the trip.
 - 2 Take the right spare parts** – Before you leave your office, gather all the replacement parts you'll need and double check their location. Whether the parts are delivered directly to the client's location or you carry them with you, arriving at a customer site without the necessary equipment will make for a wasted trip and is a poor reflection on the help desk. Besides the job-specific equipment, you should always carry spares for commonly replaced parts--keyboard, mouse, case screws, modem, network card, CD-ROM or DVD drive, and the like.
 - 3 Safety first** – Quickly check the safety of the customer's environment. Evaluate the condition of cables, trip hazards, wobbly shelves, and so forth. It takes a minute and could save you from serious injury or even death! Don't be frightened to make your safety concerns known. I would sooner a customer tell me I am making too much fuss, than fail to point out a hazard that later claimed a life. You may also be able to make recommendations about possible future failures, such as a failing screen or worn power cable.
 - 4 Ask the customer to demonstrate the problem** – Don't jump in with both feet and start pulling the covers off the customer's equipment. Before you touch anything, ask the customer to demonstrate the problem--it may be the user and not the machine. Too many times, I've checked a PC, found nothing wrong, and left the customer's location, only to be called back again. During the subsequent visit, I often discover that the caller is trying to achieve the impossible.
 - 5 Install necessary software updates** – Ensure the operating system, antivirus software, antispyware applications and the like, have all necessary updates. Although many IT organizations automatically deploy updates, it is not unusual to find unpatched machines--particularly in remote offices or businesses without in-house IT staff.
 - 6 Do a little house cleaning** – Give the PC, keyboard, and mouse a quick cleaning. A good cleaning will can make the equipment look better, last longer, and possibly run better. You may even keep yourself healthier as you avoid any germs hiding on the keyboard and mouse. Once you've taken care of the outside, then go to work on the PC's inside--defragment the hard drive, delete temporary files, clear out the browser cache, and so forth.
- Carry basic spares with you or have them nearby. A cheap replacement keyboard can make all the difference. It's not unusual for there to be more than one problem, being prepared for any eventuality is always good practice. You'll be amazed how much goodwill a wipe over can generate. Remember the last time a petrol station filled your tank and wiped the flies off the windscreen, it is a rare thing, especially in the United Kingdom.

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Double check the asset register– If your organization manages equipment through an asset register, ensure it's correct when you leave the client's location and if possible, before you leave your office. All too often people log a call on a particular piece of kit and only after you reach the customer's location do you realize that the computer you thought was in Southampton is actually in Plymouth--over three hours drive away. By the same token, I have often been called to a job on an asset number that is not the device that is giving problems. Yet another reason to speak with the customer before leaving your office.

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Explain your repairs – Before you leave the client's location, ensure the customer understands the problem's cause and your repairs. Users often believe they caused a failure, even when they didn't. Reassuring them of their innocence puts them at ease and makes them feel more comfortable the next they call IT support. If the user's actions did cause the problem, then politely educating them will hopefully save future visits. Effective communication is critical for building a positive customer relationship.

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Pick up after yourself – Don't walk away from the area, before ensuring you have all your tools. Your client may discover a forgotten tool and try to use it. From personal experience, it's extremely frustrating to know that a previous client is propping up their wilted plant with your favorite screwdriver. Worst of all, you always discover that a tool is missing when you need it most.

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Leave the customer with a smile – You may have to visit a client more than once and an angry client with a grudge can make future calls a real headache. As a field engineer with no fixed base, you need as many allies on the ground as possible. You never know when you'll need to drop in and use the bathroom, run some photocopies or charge your laptop battery while enjoying a chat and a cup of tea. Without these "courtesy calls" the field engineer's day can be a lonely, frustrating one.



Jeff Dray has 15-years IT support and help desk experience. He currently works as a field engineer for Pitney Bowes in England and specializes in their IT products. He obtained his City and Guilds adult teaching certificate from Reading College where he served as help desk coordinator. Jeff also works as a freelance writer and is an avid sailing enthusiast.

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