

Customer Service for Week Four TSEs

Materials to Prep

Classroom Prep

Big Sticky sheets of paper
 Fishbowl/bowl-like thingamabobber
 Slips of paper/post-its/index cards

[Workbook](#)

Pens, Markers, Snacks

[Slide Deck](#)

Speakers

Projector/TV

Mac cable hookup

Laminator

PreWork

None.

Lesson Structure

Pre-Lesson

Set the tone, expectations, framing, and agenda for the full bootcamp.

30 min

Intro & get seated	10 min	Sit down, start late, get names shared.
Agenda and Framing	2 min	<p>Five major segments</p> <ol style="list-style-type: none"> 1. Emotional Intelligence 2. First-Touch 3. Active Listening 4. Explaining Simply 5. Setting Expectations <p>BLAST framing:</p> <ul style="list-style-type: none"> • Be a Hero - A technician wants to meet and exceed their customer's expectations while knowing the limits of what they can do alone. First-Touch is the key skill for this item. • Listen - Understanding the issue is more than identifying the technical problem. Active Listening is the key skill for this item. • Align and Empathize - Addressing the customer experience is multidimensional, becoming an ally as well as providing a service. Emotional Intelligence is the key skill for this item. • Set up for Success - Success is not just the resolution of the issue, but identifying ways to address future issues and provide other forms of added value. Setting Expectations is the key skill for this item. • Teach - Teaching partners about what the technician did, thought, and used to solve the problem is a huge value to our tech-minded partners. Explaining Simply is the key skill for this item.
Expectations from Facilitator	3 min	<p>Facilitator's expectations pre-written on sticky sheet:</p> <ol style="list-style-type: none"> 1. I expect that you will learn 2. I expect that you will respect each other and me 3. I expect that you will embody the Datto Values: <ol style="list-style-type: none"> a. Always do the right thing. Put our customers first. b. Be inquisitive. Ask why. Find context. Be interested in what we do and how we do it.

		<ul style="list-style-type: none"> c. Be can-do. Have a bias for action. Most mistakes can be undone. d. It's better to beg for forgiveness than ask for permission. Balance progress with order. e. We are one team. Respect and trust each other. We are all working towards the same goals. f. Do your life's work. Exceptional results rarely come from ordinary effort. <p>Other expectations</p> <ol style="list-style-type: none"> 1. Pay attention. Put cellphones away. No laptops. 2. We have two breaks and a lunch. If you need to pee, go pee. 3. Timeline for the day...
Expectations from Participants	3 min	<p>Set up sticky sheet and collect expectations</p> <ul style="list-style-type: none"> • Hearing what's planned, what do you expect from me, as a facilitator? • What do you expect from each other? • What do you expect from yourself?
Icebreaker	12 min	<p>Party Tricks</p> <ul style="list-style-type: none"> • Take a few minutes to jot down on small sheets of paper a recognizable characteristic of a customer coming to a repair shop. <ul style="list-style-type: none"> ○ Allergic to metal ○ Just wants to order a cheeseburger ○ Astronaut who is afraid of heights ○ Device blew off their right hand ○ Only speaks in questions ○ Is being hunted by a Purge crowd ○ Is a star player in a Competitive Tickling League ○ Is Jon Snow • The shopkeeper and assistant leaves the room (two participants). Three people are randomly assigned a character trait and acts it out. The shopkeeper and their assistant tries to guess the character's quirks. • If possible, repeat but let the audience suggest a quirk.

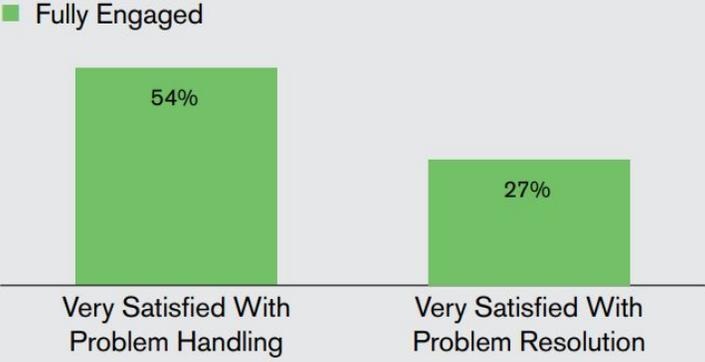
Emotional Intelligence

Learners will be able to:

- *Articulate the difference between empathy and emotional intelligence*
- *Describe one emotional intelligence strategy to incorporate in daily interactions*

35 min

Intro	2 min	<p>Post up Objectives and Agenda</p> <p>Emotional Intelligence is related to Align and Empathize from BLAST.</p> <p>This segment is first because I want you to set the self before we tackle all these soft skills.</p>
Lecture	5 min	<p>What is emotional intelligence and how is it different than empathy?</p> <ul style="list-style-type: none"> • Knowledge of self and others, actions with self and others (draw grid) <ul style="list-style-type: none"> ○ Self awareness- Your preference for hamburgers over salad, you tend to get messy when stressed, you get distracted by multiple distractors ○ Social awareness- Sales gets stressed at the end of the month, your manager likes it when you email them before dropping into their office, partners feel embarrassed when they call Support ○ Self-regulation- You don't go back to Free Lunch Friday for seconds, you schedule "clean up days", you set up email filters and mute Slack channels ○ Social skills- You know that Sales had a rough month and sympathize with the time of year, you describe things to partners that don't make them feel dumb, you know who to ping in a Slack channel about integrations • Holistic experience- each area of the grid impacts the others • Research:

		<p>Gallup has found that more than half (54%) of customers who are very satisfied with the way their problem was handled are fully engaged, compared with 27% of customers who are very satisfied with the resolution to their problem.</p> <p>Customer Engagement More Dependent on Problem Handling Than Problem Resolution</p>  <p>A bar chart with two bars. The first bar, labeled 'Very Satisfied With Problem Handling', is green and reaches the 54% mark on the y-axis. The second bar, labeled 'Very Satisfied With Problem Resolution', is also green but much shorter, reaching the 27% mark. A legend indicates that the green bars represent 'Fully Engaged' customers. The source is cited as 'SOURCE: GALLUP'.</p>
Discussion	5 min	<p>If you know what emotional intelligence is, what's empathy?</p> <ul style="list-style-type: none"> ● Empathy n. the power of entering into another's personality and imaginatively experiencing his experiences. <ul style="list-style-type: none"> ○ Chambers English Dictionary, 1989 edition ● "[Empathy is] awareness of others' feelings, needs and concerns." <ul style="list-style-type: none"> ○ Daniel Goleman, in <i>Working with Emotional Intelligence</i> ● "I call him religious who understands the suffering of others." <ul style="list-style-type: none"> ○ Mahatma Gandhi ● "Empathy is intuitive, but is also something you can work on, intellectually." <ul style="list-style-type: none"> ○ Tim Minchin ● Empathy is emotional intelligence lubricant. <ul style="list-style-type: none"> ○ Dan Newman
Activity	2 min	<p>Four teams and race to come up with all the stressors a partner experiences or a technician experiences (2 for each) in the following scenario:</p> <ul style="list-style-type: none"> ● Partner deals with five different technology vendors, each with 3-10 tickets open with their respective vendor. A backup error gets flagged on the RMM tool and they call in, though their attention is on a hardware delivery that is late from Amazon and the bigger issue of losing two clients last month and no strategy or time to gain new business. ● Tech is 5 hours into a shift with 10 tickets being worked on currently. <p><i>Managers/Supervisors do this for both roles.</i></p>
Discussion	7 min	<p>Let's share and discuss</p> <ul style="list-style-type: none"> ● What are some of the things your groups came up with? <ul style="list-style-type: none"> ○ Write on sticky-sheet ● Rank these: What's the worst things to hear from a partner beyond the technical issue? <ul style="list-style-type: none"> ○ Prompts: Frustrated because of unsolvable problem, shame at their mistake, lack of response/bad response from Datto, threatening to leave. ● What does a partner do all day? <ul style="list-style-type: none"> ○ Lots of responsibilities, lots of vendors, sometimes dealing with multifaceted disasters, finding new clients, running a business, wearing many hats ● How do partners view Datto Tech Support? How would you want them to view Datto Tech Support? <ul style="list-style-type: none"> ○ "Here's what Support Leadership wants partners to view Datto Tech Support: #####"
Activity	6 min	<p>Guided reflection</p> <ul style="list-style-type: none"> ● Draw the Emotional Intelligence grid on the board and ask learners to score themselves, 1-5 with 5 being "This comes easily to me" and 1 being "I have to actively think about this all the time", on each grid square ● Can you think of an example of you at your best with your strongest mode? Why did it go so well? ● How about your weakest mode? When was the last time you struggled with it? Why? ● What's a strategy to either maximize your strength or compensate for a weakness?

Share	4 min	Challenge by choice to share out
Homework	2 min	Hand out "Think About Me Later" sheets. Write down one strategy that you've heard/decided might be worth trying when you get back to life outside of training.
Outro	2 min	Which category of Emotional Intelligence do you think is your strongest? Articulate the difference between emotional intelligence and empathy I can apply this knowledge of emotional intelligence in my job (Strongly agree-Strongly disagree).

First-Touch

The first 10 seconds of a phone call need to communicate poise, attention, care, friendliness, and a clear flow.

- *Attendees will be able to demonstrate a welcoming and upbeat first touch over the phone.*
- *Attendees will be able to describe two good practices for resetting between calls.*

Materials needed: Your Reset Dance video

Time: 50 minutes

Intro	3 min	List some feelings that a partner should experience in the first ten seconds of a Datto technician answering the phone.
Research	4 min	<p>According to research: According to Gallup, three items that describe a customer experience more accurately than satisfaction:</p> <ul style="list-style-type: none"> • Company always delivers on what they promise. • I feel proud to be a Company customer. • Company is the perfect company for people like me. <ul style="list-style-type: none"> ◦ These three points are conveyed through actions, communication styles, and first-impressions, especially when the first-touch validates a positive pre-conceived notion. <p>According to Harvard Business Review, reducing customer effort improves loyalty</p> <ul style="list-style-type: none"> • [Don't just resolve the current issue—head off the next one.] • Arm reps to address the emotional side of customer interactions. • Minimize channel switching by increasing self-service channel "stickiness." • [Use feedback from disgruntled or struggling customers to reduce customer effort.] • Empower the front line to deliver a low-effort experience.
Activity	10 min	<ul style="list-style-type: none"> • Learners close their eyes and face away from each other. A facilitator walks around the room, tapping learners on the shoulder. • When a learner is tapped, they must give a welcoming greeting as if they were answering a phone. • After a learner gives their greeting, other participants hold up one to three fingers above their head, one being the worst and three being the best. Facilitator adds up the totals and notes who gave the best greeting. • Multiple learners give their greeting. • Facilitator tells participants they can open their eyes and start a brief discussion: <ul style="list-style-type: none"> ◦ "What were some of the great things you heard?" ◦ If the class is comfortable, share out the best performers and directly ask them, "How do you cultivate your greeting? What's running through your head? Do you always, 100%, answer the phone this way?" ◦ If greetings are all weak, facilitator encourages the following habits and demonstrates if appropriate ("First-touches that are great typically have..."): <ul style="list-style-type: none"> ■ Thank them for calling Datto Technical Support ■ Identify yourself as someone who can help ■ Partner should "hear you smile" ■ Take control of the conversation. This inspires confidence! ■ Take ownership of the issue. ■ Imagine greeting someone for an interview as the interviewee • Repeat activity until each participant can practice applying the good practices. Distractions may be added to extend the challenge of the activity: <ul style="list-style-type: none"> ◦ Music in the background, learners making random conversations, a loud bang, etc.
Discussion	10 min	<ol style="list-style-type: none"> 1. If you were a Partner, what do you want to hear when you're calling about an issue? How can you meet that need in the very first interaction? Refer to your do-now. <ol style="list-style-type: none"> a. My problem has a resolution and this person can help me b. I'm worried and this person can give me good news c. I pay for this service and I expect to get it 2. Pro/con: "...what can I help you with?" Vs "...do you have an existing ticket open with Datto?" <ol style="list-style-type: none"> a. One is leading, the other open-ended 3. Why might a Datto TSE not give an A+ first-touch?

		<ul style="list-style-type: none"> a. Not preparing for the call b. Distracted c. Emotionally compromised <p>4. What are ways to get in the right mindset, consistently?</p> <ul style="list-style-type: none"> a. Finish the prior ticket fully b. Your Reset Dance
Video explanation	3 min	Your Reset Dance: Pull up video
Activity	8 min	<p>Talk about your reset dance, design a reset dance, share some fun ones</p> <ul style="list-style-type: none"> ● Parameters: <ul style="list-style-type: none"> ○ Dos: Quick and quiet, moves the body, disconnect mentally from the last ticket ○ Don'ts: Vent about the partner, talk down, be heard over another technician's phone
Roleplay	8 min	<p>Without closing eyes, find a partner to practice your first-touch and reset dance -</p> <ul style="list-style-type: none"> ● Pair off ● In each pair, spend 1 minute miming picking up the phone and giving an excellent first touch. Do a reset dance between each attempt. ● The partner jots down notes on their partner's greeting and reset ● After 1 minute, swap roles. ● Spend 2 minutes sharing good and bad things they observed. ● Demonstrate for the entire class a greeting and a reset dance <ul style="list-style-type: none"> ○ Supervisor/Manager notes on a rubric the quality of greeting for the individual for individualized feedback at a later time.
Feedback Form	2 min	<p>Show participants what a typical feedback form looks like when they close a ticket.</p> <ul style="list-style-type: none"> ● What are the options and how would a partner interpret those options? ● Discuss QA scorecard regarding First Touch (https://docs.google.com/document/d/1J6h-ZX_wek3TDFm5Jvox4TcgZYtSgFygczahoOrQmJw/edit)
Wrap Up	3 min	<p>Describe two good practices for resetting between calls. What kind of feedback would you love to see from a partner on your first-touch? This training built my confidence in delivering a first-touch over the phone (Strongly agree-Strongly disagree)</p>
For Later	1 min	Write one thing from this section on your "Think About Me Later" sheet

Lunch Break

30 minutes

Active Listening

Understanding what a partner means goes beyond what they say. Repeating, summarizing, and giving verbal confirmations should be demonstrated.

- *Attendees will be able to demonstrate three active listening strategies.*

Materials needed: Speakers, Paper

Time: 40 minutes

Intro	3 min	Write down three listening strategies, active or otherwise.
Lecture	4 min	<p>Review Do Now: Active listening versus listening</p> <ul style="list-style-type: none"> ● Remove distractions from yourself ● Verbal and nonverbal acknowledgements ● Summarize, clarify, reflect back ● Let the speaker finish ● Write down notes of important concepts <p>Discussion: What is Active Listening?</p>
Fishbowl	6 min	<p>Play a bad phone call. Participants give thumbs up and thumbs down based on what they hear and jot down good/bad habits. As this is the first time we're hearing phone calls, explain how they were collected:</p> <p>~Every call is recorded for potential review ~Used to learn good, bad, and trends ~Used as a teaching tool as well as a learning opportunity for the tech ~In general, Datto Tech Support phone call skills aren't bad, but there are bad and good habits everyone</p>

		expresses Discuss. Write down Good Phone Call Strategies and Bad Phone Call Pitfalls on a side-board (add to this throughout training)
Research	1 min	From Gallup, "Because of the complexity of B2B customer relationships, problems may not always be the result of errors or a product or service failure. Instead, problems may stem from a lack of communication, misunderstandings or conflicting messages between the supplier and the members of the company's buying center, or among buying center members themselves. Because of this, suppliers should build strong relationships to facilitate timely and accurate communication. When product, service or communication failures occur, suppliers can draw on these partnerships when discussing and negotiating how to solve these problems." (p. 30)
Activity	5 min	Participants pair off and one person tells a story about their favorite restaurant experience and the other person practices Active Listening <ul style="list-style-type: none"> ● Two minutes to tell a story about something they've learned lately. ● Listeners should try to exercise at least three strategies <ul style="list-style-type: none"> ○ Remove distractions ○ Verbal and nonverbal acknowledgements ○ Write down details of important concepts ○ Summarize, clarify, reflect back ○ Let the speaker finish ● Swap roles after two minutes
Discussion	4 min	Everyone shares insights with the group, if any <ul style="list-style-type: none"> ● Facilitator prompts: <ul style="list-style-type: none"> ○ "What comes naturally to you? What's harder?" ○ "How did you feel when someone was giving you responses?" ○ "How would you adapt active listening to phone calls?"
Activity	7 min	Participants pair off and one person tells a story about how they came to Datto and the other person practices Active Listening strategies, however they do it back-to-back. <ul style="list-style-type: none"> ● Repeat prior activity but back to back, simulating a phone call. If possible, have people actually do it over a phone line (cell phone or desk phone). ● Group shares experiences. Facilitator questions: <ul style="list-style-type: none"> ○ "How did losing body language affect your Active Listening strategies?" ○ "Can you guess how your partner was standing/sitting when they were listening?" ○ "How does Active Listening impact your day-to-day life, outside of answering phones?"
Storytime	7 min	Participants now retell their partner's learning experience from the first activity. Partner confirms if they got the most important details.
Wrap Up	2 min	"What three Active Listening strategies will YOU use over the phone? How can you tell someone is actively listening to you? This training met my needs as a TSE (Strongly agree-Strongly disagree)."
For Later	1 min	Write one thing from this session down on your "Think About Me Later" sheet

Intermission

General discussion: What have you seen and heard in your first week on the floor?

Explaining Simply

Partners are generally technical people who want to know how a solution was achieved. Taking a complicated and interwoven problem and breaking into a simple explanation provides superior customer service.

Competency will be assessed by explaining common technical solutions.

- Attendees will be able to explain four common issues or pieces of Datto technology in simple language without jargon.

Materials needed: Most common technical issues data, How to Handle Silence Video

Time: 50 minutes

Intro	1 min	List all the self-service resources available to Partners.
Review Do Now	1 min	Review self-service resources: <ul style="list-style-type: none"> • Academy • KB • Forum
Phone Call	4 min	Listen to sample phone call and identify the technical competency of the caller
Discussion	5 min	You have a partner on the line: who are the kinds of people you most often encounter? <ul style="list-style-type: none"> • Technical people, business owners, sometimes someone who knows nothing How do you identify the technical competency of the person on the line? <ul style="list-style-type: none"> • Ticket history, depth of description of the problem, troubleshooting steps they took How do you engage them beyond you asking them questions? <ul style="list-style-type: none"> • Explaining, describing, referring to resources
Activity	10 min	Socratic dialogue on the following pieces of technology: <ul style="list-style-type: none"> • Inverse chain technology • The difference between partner portal, remote web, device UI, and “back end” of a device • How a computer works <ul style="list-style-type: none"> ○ Key areas for the learners to grapple with: What is happening, what’s the chain of causation, what externalities may be present, what’s the big picture, preventative/educational opportunities
Data	3 min	Share data of most common technical issues and explain how often they happen
Small group discussion	11 min	Break class into small groups with most common technical issue per group. Have the group identify key technologies, problem solving steps, or possible contingencies that could happen when solving the problem. After identifying a list of topics, practice explaining the topics as simply as possible. Participants present to the class how to explain the topics simply. <ul style="list-style-type: none"> • Facilitator judges whether the explanation is simple or demeaning
Transition to Silence		These simple explanations take time and should be practiced over time. However, if you don’t have that explanation at the ready, there’s an explanation most techs give:
Silence on Calls	3 min	Demo long periods of silence by pulling up a waveform while listening.
Discussion	4 min	Seriously though, silence. You can explain things simply, but how do you manage silence? <ul style="list-style-type: none"> • Offering callbacks <ul style="list-style-type: none"> ○ If possible, share Outbound call metrics and the correlation with inbound call time • Predicting key pieces of information for a partner to acquire • Giving tasks to the partner, if relevant • Preparation for silence, setting expectations, narrating through it if a partner is interested • Offering a KB to read that is germane to the ticket <ul style="list-style-type: none"> ○ Not to be used as a crutch for explaining simply, but as a value-add • Silence phrases: ask audience to produce some pre for silence and coping with silence responses. <ul style="list-style-type: none"> ○ Samples: "I'm going to get the lay of the land here, gimme five minutes"/"I want to check on three possible culprits, would you like me to call you back when I'm done with that?"/ "Do you want me to lead you through my thought process, or do you want me to ping you when I need information?"
Wrapping Up Calls	3 min	Things you should consider to say: <ul style="list-style-type: none"> • Summarize discussion • Clearly articulate and log the next steps • Ask for Anything Else?
Wrap Up	3 min	Explain Inverse Chain Technology Give two phrases to say when you have silence coming up. The Customer Service Bootcamp, overall, was satisfactory (Strongly agree-Strongly disagree).”
Laminate stuff	2 min	Write down anything else you’d like to your “Think About Me Later” sheet and let’s get that stuff dated and laminated

Break 15 minutes

Setting Expectations

In order to exceed expectations, one needs to set them. Understanding technical boundaries, ownership of the problem, and accurately articulating and predicting steps to solve problems. Competency will be assessed by reasoning through common technical problems.

- Attendees will be able to categorize four activities as Low, Normal, High, and Urgent based on Datto's Technical Support Service Level Agreement
- Attendees will be able to demonstrate one method for setting expectations with a partner

Materials needed: Whiteboard and markers, Do's and Don'ts sheet, Support SLA sheet, Experienced Technician to evaluate responses, Fake tickets in Zendesk, Scenarios and cards

Time: 60 minutes

Intro	2 min	List ways you can add value when working a Support ticket.
Lecture	2 min	Greatest Hits from Service Level Agreement: <ul style="list-style-type: none"> Low: 10 hours Normal: 6 hours High: 4 hours Urgent: 1 hour
Activity	7 min	<p>Write Low, Normal, High, and Urgent in circles on a whiteboard. Create a mind-map of problems that would be associated with each bucket. Dispense sheets of paper that list our policy language. Explain that this activity is to see what norms and what questions we ask when trying to identify priority "by the book". Ignore the consequences of handoffs for now.</p> <p>Low - Issues that do not impact business or backup function or do not have a time constraint, but may cause problems in the future, such as warning messages. A Technical Support Expert will respond within ten hours.</p> <p>Normal - Issues that do not impact normal business function, but cause problems with backups, such as failed backups or error messages. A Technical Support Expert will respond within six hours.</p> <p>High - Issues that impact business, but do not hinder normal operation, such as a Datto device being down or a device having no space available for additional backup. A Technical Support Expert will respond within four hours.</p> <p>Urgent - Issues that directly impact business functions and hinder normal operation during normal business hours, such as a server being down. Technical Support Experts make urgent cases a priority and will respond as quickly as possible, and always within one hour.</p> <p>Experienced tech would give synopsis/scenario and participants vote where the issue should be categorized. Allow participants to add their own scenarios, if possible. If participants fail to generate suggestions, suggest the following:</p> <ul style="list-style-type: none"> Screenshot error, offsite sync failure, client data lost, SMART error on one disk drive, RMA request <p>Reminder: If Partners create the ticket, they set the priority.</p>
Discussion	5 min	Lead discussion on Partner experience and expectations: <ul style="list-style-type: none"> What do partners typically expect from all their vendors? What do partners typically expect from Datto Technical Support? What do partners want from Datto Technical Support? What's reasonable? What's practical? What's ideal?
Minilab Dos and Donts	15 min	<p>Hand out Do's and Don'ts. These are guides for how we should behave and act which help set our partner's expectations. Break participants in groups with pads of paper and assign them a few Dos and Donts to discuss. Critical question for discussion: <i>What's the rationale behind this do/don't? How do we demonstrate/communicate it to Partners?</i></p> <p>Group discussion and sharing.</p>
Fishbowl	15 min	<p>Bring up a willing participant to roleplay in front of the group</p> <ul style="list-style-type: none"> Set up a fake ticket in Zendesk and ask the participant to pretend being the support rep taking the call.

		<ul style="list-style-type: none"> ○ Screenshot error ● A supervisor/manager calls in referencing the ticket number. The participant pulls up the ticket where it simply explains that the original issue was a screenshot error and another tech was solving the issue in the past two hours. ● The participant must attempt to set the “partner’s” expectation that the error is being worked on by another technician. ● The participant can try to use other customer service skills to settle the partner. ● Non-participants write down when the participant sets expectations or misses an opportunity to set expectations. ● Facilitator helps as needed. <p>Debrief call:</p> <ul style="list-style-type: none"> ● What went well? What didn’t go so well? How to improve? ● Was the resolution within SLA? Did the resolution meet expectations? Did the resolution exceed expectations? <p>Repeat, except the error deals with backups not taking place and the partner is unaware.</p>
Discussion	10 min	<p>Discussion:</p> <ul style="list-style-type: none"> ● What are ways Support adds value to exceed customer expectations? ● How does Datto get partners to communicate their expectations? ● How do TSEs share the expectations they hold of the partner?
Wrap Up	3 min	<p>“Write one strategy to add value during a partner interaction over the phone. If you were the partner with the support ticket, what’s expected of you? How do you know? The clarity of this session’s learning objectives were clear (Strongly agree-Strongly disagree).”</p>
For Later	1 min	Write one thing from this session on your “Think About Me Later” sheet

Optional extension activities

Real Case Scenarios

Have TSEs call in for small group practice.

Emotional Intelligence Extension- Personality Types

Empathizing with a partner requires an awareness to their needs and stressors to see things from their point of view. Competency will be assessed through self-reflection and metacognitive activities.

- Attendees will be able to articulate two of their personal strengths
- Attendees will be able to interpret two partner stressors and assess how they impact a technician’s responses

Materials needed: Personality inventory

Time: 45 minutes

Intro	5 min	Personality inventory (DISC)
Lecture	5 min	<p>What is emotional intelligence and how is it different than empathy?</p> <ul style="list-style-type: none"> ● Knowledge of self and others, actions with self and others (draw grid) <ul style="list-style-type: none"> ○ Self awareness, social awareness, self-regulation, social skills ● Holistic experience- each area of the grid impacts the others ● Transcends “customer service training”
Q & A	3 min	Any questions or clarifications on your personality survey? Does anyone want to share?
Guided	8 min	Handwrite responses to the following questions:

reflection		<ul style="list-style-type: none"> • What are your strengths? Which ones resonate the most with you? The least? Why? • Describe a recent example where your strengths played a major role in your decision/actions. Were you pleased or displeased with your decision? Were you pleased or displeased with the effects of that choice? • Are you able to showcase your strengths in your current role? How can you adapt in your role to better play to your strengths?
Sharing is caring	5 min	Challenge by choice to share out responses
Discussion	8 min	<p>Let's shift to partners:</p> <ul style="list-style-type: none"> • What's the worst things to hear from a partner beyond the technical issue? <ul style="list-style-type: none"> ◦ Prompts: Frustrated because of unsolvable problem, shame at their mistake, lack of response/bad response from Datto, threatening to leave. • What does a partner do all day? <ul style="list-style-type: none"> ◦ Lots of responsibilities, lots of vendors, sometimes dealing with multifaceted disasters, finding new clients, running a business, wearing many hats • If you were a partner, what's would be the most stressful thing? <ul style="list-style-type: none"> ◦ Sales and marketing, juggling multiple vendors and technologies, managing clients who may be total luddites, rate of change in technology • How do partners view Datto Tech Support? How would you want them to view Datto Tech Support? <ul style="list-style-type: none"> ◦ "Here's what Support Leadership wants partners to view Datto Tech Support: #####"
Small group discussion	7 min	<p>Break into trios and discuss this critical question: "How can I use my role and my strengths to best serve the needs and stresses for partners?"</p> <p>Follow up question: "What new tactic will I take with partners, based on this training? Can be an internal tactic (suspend judgement on emotional responses) or it can be an actionable tactic (Always asking "How sensitive is the data to you?")"</p> <p>How do we communicate empathy while exercising emotional intelligence?</p>
Wrap Up	3 min	<p>"Name two stressors that impact a partner's response and identify how that may manifest in their interaction with you over the phone.</p> <p>What is a strength that you are proud of?</p> <p>I can apply this knowledge of emotional intelligence in my job (Strongly agree-Strongly disagree)."</p>