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Help Ticket Best Practices [1]

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Approach to Help Ticket Adoption

Groups supported by UIS would benefit from a help ticket similar to eComm. The benefits are many but ultimately create more timely and efficient responses:

- self-troubleshooting based on selection (fewer tickets created)
- notify one/many individuals based on the selection
- can create an Issue in Gitlab (or not)
- can have internal fields to track work (closed/owner/etc)
- can have conditional questions to get necessary information upfront for faster troubleshooting.

Folks are used to sending emails, so there will always be a learning curve. UIS employees need to be united in our approach. There are ways to encourage adoption:

1. Tell all users to use the help ticket. and highlight all the benefits.
2. When someone submits an email, complete the ticket and in the response mention "Can you please submit a ticket for things like this in the future".
3. It's not uncommon to need to remind folks of the correct process. If you recently did the above, write back, "Would you mind submitting this as a help ticket at: LINK". They will be more inclined to do so right now with their issue unresolved. Usually the next time, folks remember to use the ticket rather than email.
4. When someone continues to disregard the process, submitting issues on their behalf can help get the message across. I tell users "I can't do work without a ticket, so you can submit it or I can. But you doing it will get you a faster turnaround time."
5. 100% of users will never adopt this 100% of the time - and that is okay. The value is the 80% who want to do things correctly and adopt scalable and efficient processes.
6. Those who fail to follow processes will be worse off. Seize opportunities to highlight it. for them:
    - I had a user email me at 9 PM because they were going on vacation and needed to send an email, but there was an error message in Marketing Cloud. We were unable to connect before they left and the communication didn't go out until they returned. The error message screenshot with a solution was available on our help ticket, so they could have self-resolved in real time and got the message out on time. I let them know, and that individual stopped emailing after that.
    - Get emails for requests that are not for you? Make sure your team has a response to say, "I'm not the right person, would you mind submitting a help ticket so it does get to the right people? Thanks!".
    - Teach others to fish, do not fish for them. If someone calls you to say "How do I do

A/B testing', do walk them through it or just send the link. Show them where to find this resource (Help ticket >> Marketing Cloud >> A/B Testing). "Good question, would you mind sharing your screen. I shared our help ticket link with you. First let's bookmark it and then I'll show you where the A/B wiki is.".

Mantras

- Create a ticket for every question.
- Do not let perfection hinder progress.

Related Wikis

- eComm Notifications (Chatter) [3]
- Rolling out Chatter in Salesforce (for Admins) [4]
- Help Tickets / Feedback Loop
- Wiki Creation / Documentation

Always Important

Include wikis in Help Ticket

- Present relevant wikis within the Help Ticket to mitigate ticket submissions altogether.

Phased Approach

Which part of the Help Ticket to Start With?

1. Start with the **simplest of tasks** (how to log in, meet the team, what we do, who we support, etc.).
2. Identify the **most frequent requests**. Educating in these areas will bring the most value quickly.
3. Make **new user training on-demand** - it will buy time to create advanced training materials or enhance existing ones. An unedited recording is a fine, short-term solution to start getting users trained without the time commitment of 1:1 training.
4. Are any **new items getting rolled out**? Get these documented so you can share the wiki resource and build adoption. Host one live session (less than 30 min. preferred) and make the recording available.
5. Save infrequent or the most complex requests for last.

The phased approach above aligns directly with that for wiki creation - by design. When a new wiki is created, leverage it within the help ticket.

Approach to the Help Ticket

- The help ticket is dynamic and should be enhanced regularly.
- Your 'Other' dropdown will let you find common tickets organically. Once a common ticket is identified, create a wiki then add an option to the dropdown.

- Present relevant nformation based on a selection in the dropdown.
    - This can achieve a number of things depending on the goal:
    -

Approach to Change

- Present resources at every opportunity.
    - Help Ticket
    - Wiki Index / Need Help? Start Here.
    - Salesforce Chatter Groups

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