IDEAL Agent Workflow

Identify — Paraphrase Issue & Goal

Probing Questions
- When?
- Where?
- What?
- Why?
- How?

Clarifying Questions
- Describe your end goal.
- Tell me what you've tried?
- Did it work recently?
- Describe the impact of this issue?
- Do you have time to resolve now?

Define — Agreement of Root Cause

Narrowing Questions
- What do you expect the report total to be?
- What's the opening balance?
- Has anything changed with your system?

Troubleshooting
User
Data
Application
System

Explore — Agreement & Proposed Solution

Use Resources
- KBs
- Screen share
- Subject Matter Expert
- In-product Help

Rank Solutions
- Based upon customer's time & end goal
- If a new issue or solution is discovered, there will be a need to go back to Identify or Define

Act — Solution Implemented

Solution Implemented
- Protect the customer's data:
  - ✓ Make a backup; memorize a report; copy a template
  - ✓ Test in a sample company

Look Back — Customer Understands Solution

Explain Steps
- Paraphrase the solution
- Educate the customer to avoid reoccurrence

Wrap-up
- Replace files to their original location
- Remove unneeded files

Fall in love with the customer's problem