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Customer Relations Helpdesk Training

3 days (21 hours)

Presentation

Helpdesk Customer Relations is a training course designed to master the fundamentals of user support and customer relations within IT departments. It enables you to structure an efficient Helpdesk, boost customer satisfaction and optimize support processes.

Our Customer Relations Helpdesk course will teach you how to use essential support tools (ticket management, SLA tracking, reporting), develop your communication skills and implement customer-oriented practices.

You'll also learn how to manage a Helpdesk team, improve user satisfaction and integrate innovative solutions such as automation and AI.

At the end of the course, you'll be able to organize a high-performance Helpdesk, manage incidents and requests efficiently, and make support a real lever for building customer loyalty.

Like all our training courses, this one is based on market best practices and favors a practical, operational approach.

Objectives

- Understand the role and missions of a Helpdesk
- Use essential ticket and SLA management tools
- Improve customer relations and user experience
- Manage a Helpdesk team and track KPIs
- Integrate automation and AI into support processes
- Implement a continuous improvement approach

Target audience

- Helpdesk technicians
- ITSM managers
- IT project managers
- Customer service teams

Prerequisites

- No prerequisites

Customer Relationship Helpdesk training program

Understanding the role of the Helpdesk

- Definition and positioning of the Helpdesk within the company
- Differences between Helpdesk, Service Desk and IT Support
- The place of the Helpdesk in ITSM and service management
- Types of requests: incidents, queries, questions
- Impact of the Helpdesk on customer satisfaction
- Workshop: Mapping Helpdesk roles and responsibilities

Helpdesk tools and technologies

- Overview of solutions (ServiceNow, Zendesk, Jira Service Desk...)
- Key features: tickets, prioritization, SLA tracking
- Integration with other tools (CMDB, monitoring, CRM)
- Automation basics (chatbots, automatic responses)
- Reporting and dashboards for managers
- Workshop: Practical discovery of an open-source helpdesk tool

Day-to-day customer relations

- User communication techniques
- Greeting and first contact management
- The rules of active listening and reformulation
- Adapting your language to your audience (technical or not)
- The importance of user feedback
- Workshop: Simulating a Helpdesk call with a customer

Incident and request management

- Ticket life cycle (opening, processing, closing)
- Prioritization and management of service levels (SLA)
- Escalation to higher levels (N2, N3)
- Importance of traceability and history
- Proactive management of recurring problems

- Workshop: Resolution of a typical incident with full follow-up

Helpdesk organization and management

- Structuring a support team (N1, N2, N3)
- Defining team roles and responsibilities
- Managing schedules and request flows
- Steering dashboards and key performance indicators (KPIs)
- Best practices in knowledge management (knowledge base)
- Workshop: Building a Helpdesk KPI dashboard

Improving customer satisfaction and experience

- Measuring user satisfaction (surveys, NPS, CSAT)
- Techniques for defusing conflicts and managing difficult customers
- Enhancing support responsiveness and efficiency
- Proactive communication in the event of a major incident
- Implementing a customer-oriented culture within the team
- Workshop: Drawing up a continuous improvement plan based on customer feedback

Quality and compliance in the Helpdesk

- Norms and standards (ITIL, ISO 20000, ISO 27001)
- Process compliance and traceability of actions
- RGPD compliance and customer data protection
- Quality control and internal audits
- Integration of security procedures into support

Helpdesk automation and innovation

- Automation of simple ticket creation and resolution
- Use of chatbots and conversational AI
- Self-service and customer portals
- Integration with CRM and analytical tools
- Trends: AI, Machine Learning and predictive support

Summary and future prospects

- The key skills of a modern Helpdesk technician
- Case studies of successful transformations
- Current limits and challenges of customer support
- Outlook: Self-service, AI, automation
- Checklist of best practices for a high-performance Helpdesk
- Workshop: Drawing up a Helpdesk evolution roadmap

Companies concerned

This course is aimed at both individuals and companies, large or small, wishing to train their teams in a new advanced IT technology, or to acquire specific business knowledge or modern methods.

Positioning on entry to training

Positioning at the start of training complies with Qualiopi quality criteria. As soon as registration is finalized, the learner receives a self-assessment questionnaire enabling us to assess his or her estimated level of proficiency in different types of technology, as well as his or her expectations and personal objectives for the forthcoming course, within the limits imposed by the selected format. This questionnaire also enables us to anticipate any connection or security difficulties within the company (intra-company or virtual classroom) which could be problematic for the follow-up and smooth running of the training session.

Teaching methods

Practical training: 60% hands-on, 40% theory. Training material distributed in digital format to all participants.

Organization

The course alternates theoretical input from the trainer, supported by examples, with brainstorming sessions and group work.

Validation

At the end of the session, a multiple-choice questionnaire verifies the correct acquisition of skills.

Certification

A certificate will be awarded to each trainee who has completed the entire course.