



BUSINESS ISSUES ([/CATEGORY/BUSINESS-ISSUES/](/category/business-issues/)) [macs](/category/mac/) ([/category/macs/](/category/mac/)),
[troubleshooting](/tag/troubleshooting/) (</tag/troubleshooting/>), [upgrades](/tag/upgrades/) (</tag/upgrades/>)

Advice from an Apple Tech: The Great Upgrade Freakout (and how to deal with it)



[Chris Barylick](#)

Aug 22, 2014 5:51 AM | |

There's no stopping change.

And there's no stopping the reaction of a tech client who might be less than enthralled with whatever necessary changes you had to incorporate to save their data, upgrade their Mac and/or get their Mac working again. Yes, their computer is back, but something is either slightly or radically different and this is sticking in their craw. A user interface has changed in the new version of Microsoft Office, they liked the old version of iTunes better, or they didn't expect those new icons in that new version of Mac OS X that you had to install to make a print driver or application work.

As much as this may add to your workload (it's generally implied that you'll spend some time off the clock explaining the new changes they're seeing), their frustrations are not unfounded. They had something that behaved a certain way, they'd become accustomed to it, and now change has been thrust upon them without their input. Add in the fact that hardware, software, and your time as a tech aren't cheap and potential frustrations with the upgrade can become that much worse.

Perhaps the first thing for any tech to understand is that while you're obligated to help explain the changes caused by an upgrade and how they might be necessary, this is not an invitation for indentured servitude, complete with the client calling, emailing or demanding the tech



come over pro bono and explain the changes created by the upgrade yet again. That being said, there will be nightmare clients who ask for more than can be reasonably given. This is why referrals were invented, even if they're just a more polite way of telling them to take a long walk off a short pier and voice their grievances to the local sea life.

What can be done, and the best way to find a balance, is to take the following steps throughout the process.

- Explain the need for the upgrade and why it's necessary.
- Walk them through the upgrade as you're implementing it.
- If there are different steps that need to be taken by the user once the upgrade is complete, write them down, go over the steps with them again and print out copies of the documentation for both yourself and your client.
- YouTube is your friend and its instructional videos are not to be denied. If your client is worried about how to learn to use a new application, piece of hardware or version of an operating system, odds are you can point them towards an instructional YouTube video, bookmark the video for easy access later and perhaps save the link to the desktop as well. The person in the video teaching the viewer how to perform a process is probably feeling more patient than you are and can be accessed at any time. Take advantage of this.
- Finally, set the parameters. Yes, you can explain the new changes that follow an upgrade pro bono, but you'll need to define your limits, whatever they may be. Explain things as best you can, provide them with instructional video links and helpful FAQ bookmarks before leaving, distinctly state when you're charging, when you're on or off the clock and what times are or are not appropriate to call with a tech question. If both sides know what to expect, the tech/client relationship can grow and last through the years.

MORE FROM MACWORLD

Shadowgate review: This castle still wants to kill you, 25 years later
(<http://www.macworld.com/article/2465859/shadowgate-review-this-castle-still-wants-to-kill-you-25-years-later.html>) (Macworld)

Devices disconnecting? It's about the hub, bub
(<http://www.macworld.com/article/2459086/devices-disconnect-the-hub-bub.html>) (Macworld)

With iPhoto's demise, writing may be on the wall for iLife
(<http://www.macworld.com/article/2452652/with-iphotos-demise-writing-may-be-on-the-wall-for-ilife.html>) (Macworld)



(<http://www.macworld.com/article/2465859/advice-from-an-apple-tech-the-great-upgrade-freakout-and-how-to-deal-with-it.html>)



(<http://www.macworld.com/article/2449839/devices-plugable-usb-hub-review-this-castle-still-wants-to-kill-you-25-years-later.html>)



(<http://www.macworld.com/article/2452652/with-photos-demise-writing-may-be-on-the-wall-for-iLife.html>)

AROUND THE WEB



(<http://www.zerto.com/blog/general/top-5-reasons-why-backup-is-not-disaster-recovery/>)

Top 5 Reasons Why Backup is Not Disaster Recovery
(<http://www.zerto.com/blog/general/top-5-reasons-why-backup-is-not-disaster-recovery/>) (Zerto)



(<http://www.businessmapping.com/the-purpose-of-a-process/>)

The Purpose of a Process
(<http://www.businessmapping.com/the-purpose-of-a-process/>) (Business Enterprise Mapping)



(<http://www.realbusiness.com/2013/12/just-got-an-ipad-heres-how-to-use-it-for-work/>)

Just Got an iPad? Here's How to Use it for Work
(<http://www.realbusiness.com/2013/12/just-got-an-ipad-heres-how-to-use-it-for-work/>) (Real Business)

COMMENTS



5 Comments

Sort Subscribe RSS (<http://comments.US1.gigya.com/comments/rss/5311901/mw/2465859>)



B. Jefferson Le Blanc

3 days ago

I try not to force update and upgrades on people if they're unwilling to deal with them. If an upgrade is absolutely necessary, I should be able to explain it to them. If they can live without it, and prefer to do so, I generally let them alone.

Other times I will raise the topic occasionally to help them become accustomed to the idea so that, eventually, they will embrace the change. For instance, I have friends and clients who are sticking with OS X 10.6 Snow Leopard because it does everything they need to do on their computers. Sooner or later they'll have to upgrade, but until it becomes unavoidable, they will avoid it. Just about the worst thing a tech consultant can do is browbeat someone into upgrading because the consultant thinks it's important, regardless of the client's wants and needs. That's a surefire recipe for trouble.

I explain the pros and cons of an upgrade if I think it's important and let the client decide what they want to do. If they feel they are in control of things they are much less likely to be unhappy with the results. If you bulldoze someone they will almost certainly be displeased with the process and with the results. If you can't put yourself in a client's shoes, you probably should not be doing tech support.

Like Reply Share 1 reply

0



begemotike

2 days ago

At the risk of being a Yes Parrot, I'm happy to see someone noted this. Upgrades that will alter the user experience should only happen when necessary, and only when the users has already been informed that something will change. If they consent after being made aware, then the chances of them being upset are extremely slim.

The tactic of bringing things up well beforehand is a solid technique as well. When it comes to OS updates, for folks who aren't all gung ho on upgrading by themselves, it works better to raise the topics literally months, if not years, in advance so they are well prepared for their favorite copy of 10.5 just no longer working for what needs to be done.

Like Reply Share

0

James Champlin

3 days ago



I've never been able to understand how the minor changes from one version to another can completely lose people. Even "big changes" like Windows 8's start page (it functions identically, only it covers the whole screen rather than a tiny corner.) or wide-yet-meaningless changes (such as the occasional visual refreshes that OS X gets) are nowhere near the big deal people make them out to be.

If an individual uses their senses, uses their mind, then they would simply use what's there. It could change every day and it wouldn't matter because the user would have learned *how to use a computer* rather than the memorization that folks apparently employ.

Maybe folks are really just stupid. Yeah, that's gotta be it.

Like Reply Share 2 replies

1



B. Jefferson Le Blanc

3 days ago

Perhaps you don't understand how changes in their computer environment can "lose people" because you don't understand people. Yeah, that's gotta be it.

Beyond understanding people, doing tech support (of any kind) requires patience. Indeed, in my experience, patience is every bit as important as technical knowhow. You can't effectively help others if you're looking down your nose at them. People can smell condescension and not even BO is a bigger turn off. As if there are not subjects about which any of us is every bit as ignorant as the most clueless computer user.

Like Reply Share 1 reply

0



begemotike

2 days ago

Let me just give this a huge hear hear. All too often consultants forget that their first and most primary role is in understanding the users needs and communicating with them clearly. If you don't understand why a user would freak out, then you shouldn't be helping users.

Like Reply Share

0