

Unit 1

HDI Desktop Support Technician Training

Agenda

- Unit 1 Key Points
- Unit 1 Activities
- Unit 1 Review
- Unit 2 Key Points
- Unit 2 Activities
- Unit 2 Review



Setting Some Context

Location: Support Center/Service Provider

- We are assuming we're working an IT Services Provider. For example, Byte Back works with Meridian as their Service Provider.

First Line of Support: Customer Service Specialists and Support Center Analysts:

- These staff are the people who first answer when you call in for support. They mainly assist over the phone.

Second Line of Support: Desktop Support Technician

- You are a point of escalation when issues are too difficult for front line staff. In addition to helping over the phone, you also can head to customer sites and help in person.



Unit 1: Support Center Overview



Main Ideas

- What are the responsibilities and roles of a Support Center?
- What are the responsibilities and roles of a Desktop Support Technician?
- How did the Support Center start? And where is it headed?
- How can you be an effective Worker? Team Member? Leader?

Unit 1 Activity:

Getting Past the First 90 Days

The majority of people fired in the first 90 days of work are let go because of ineffective soft skills, as opposed to technical ability. Let's see how we can avoid that.

1. What are the 3 roles a desktop support technician needs to fill?
2. How can you display each of the above in the helpdesk position role?

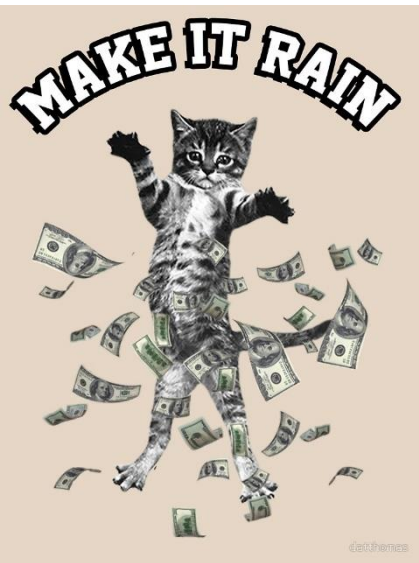
Unit 1 Activity:

Getting Past the First 90 Days

[Answers]

1. What are the 3 roles a desktop support technician needs to fill?
 - **Customer Champion:** Promote image and service of contact center.
 - **Expeditor:** Executes tasks effectively and quickly
 - **Expert:** High degrees of knowledge, skill, or experience
2. How can you display each of the above in the helpdesk position role?
 - Provide amazing customer service.
 - Speak of company well.
 - Stay on top of new technology and issues to address upcoming issues quickly and effectively.

Unit 1 Activity: Getting Promoted



You start off at a nice entry level job with \$40000 a year, but a position opens up for a supervisor role giving \$55,000 a year. Lets aim for you to be first in line for consideration.

1. What are characteristics of an effective leader?
2. Who are some ineffective leaders you had?

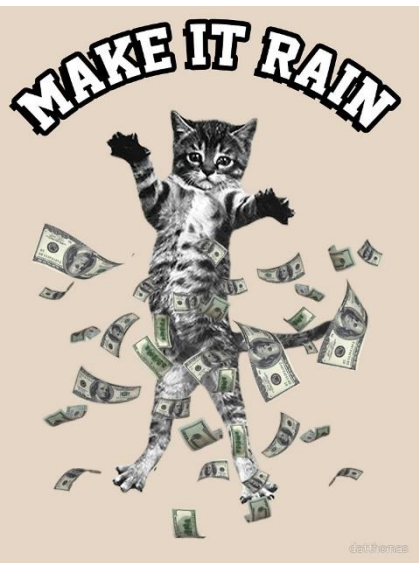
Unit 1 Activity: Getting Promoted [Answers]

1. What are characteristics of an effective leader?

- Leads by example
- Motivates Others
- Encourages participation, creative thinking, and initiative
- Demonstrates positive attitude
- Practices active listening
- Displays ethical behavior

2. Who are some ineffective leaders you had?

- This is a self-reflection activity. Use those examples to guide how you should try not to act in the workplace.



Unit 1 Activity: Team Dynamics

You got the promotion! Now you're in charge of a 5 person team, but not everyone's getting along. It's your job to fix the team dynamics.



1. Benny uses teamwork to “share” his workload with others, so he has less to do. How would you address Benny?
2. Martha sees a team as a way to express your true self. She often spends time talking about her preferred political candidates and why the Raven’s are “the best goddamn football team ever.” How would you address Martha?
3. Your team is given an assignment to complete, and the only way to do so would be your team to work over the weekend? What do you do?

Unit 1 Activity: Team Dynamics

[Answers and Ideas]



1. Benny uses teamwork to “share” his workload with others, so he has less to do. How would you address Benny?
 - **Main Idea:** While teamwork aims to gain contributions for all member, each member has different roles to fulfill, so sharing is not always appropriate. Each DST has to take accountability for their own tasks.
2. Martha sees a team as a way to express your true self. She often spends time talking about her preferred political candidates and why the Raven’s are “the best goddamn football team ever.” How would you address Martha?
 - **Main Idea:** While a benefit of teamwork is increased connection, using this to share everything is not appropriate in a work setting. The main benefits of teamwork through connecting with others would be increased satisfaction and motivation in feeling.
3. Your team is given an assignment to complete, and the only way to do so would be your team to work over the weekend? What do you do?
 - **Main Idea:** While important to complete your tasks, choosing an “at all costs” mindset will create burnout and goes against the idea of balancing your work well. The best solution here would be to connect with your manger and clearly explain why the timeline won’t work, and propose a new one.

Unit 2

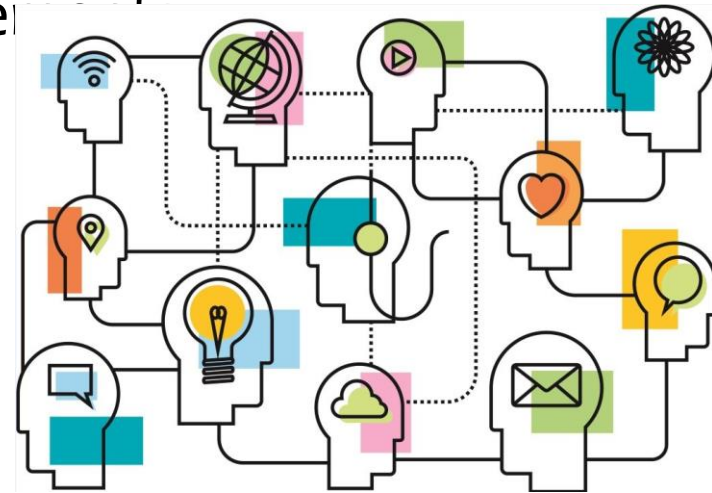
HDI Desktop Support Technician Training

Agenda

- Unit 2 Key Points
- Unit 2 Activities
- Unit 2 Review

Unit Two: Strategic Framework

- How does a Help Desk decide and track progress on what's important?
 - ✓ Mission Statements and Vision Statements
 - ✓ Best Practices
 - ✓ Service Level Agreements
 - ✓ Organization Level Agreements
 - ✓ Underpinning Contracts
 - ✓ Service Catalogs

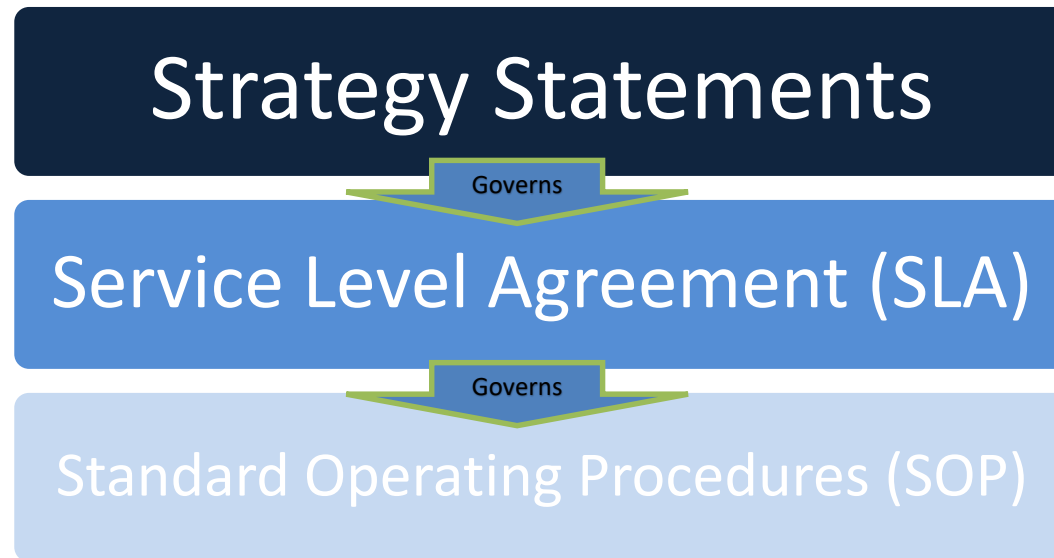


Unit 2 Review: SLA vs OLA vs UC

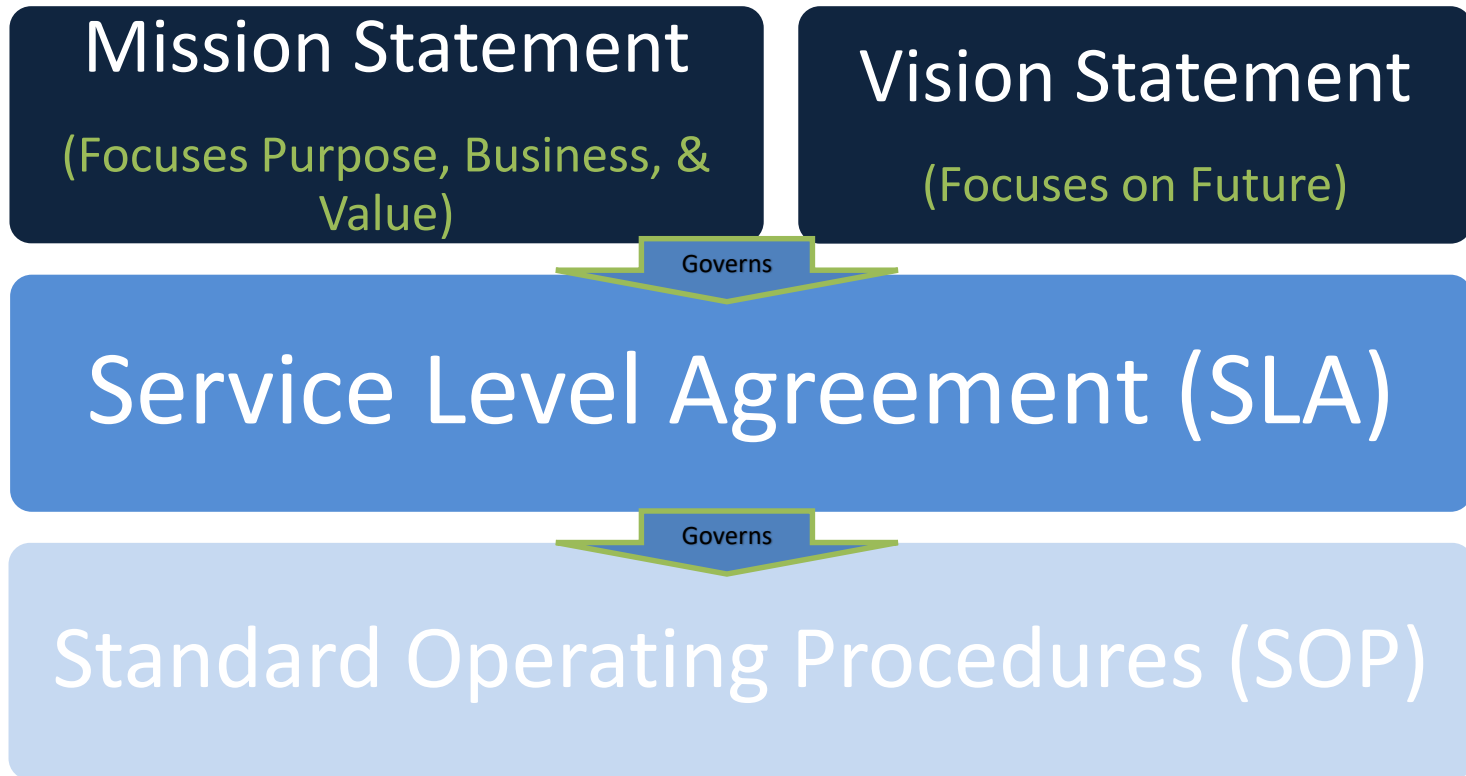
Video: <https://www.youtube.com/watch?v=wll-YgnQXV4>

Agreement Type	An Agreement Between	Contains
Service Level Agreements (SLA)	Service Provider and Customer External Facing	Response Time Commitments, Escalation Requirements, Pricing
Operational Level Agreements (OLA)	IT Service Provider and internal parts of IT Service Provider Internal Facing	Response Time commitments, Resolution Time commitments, Escalation Steps, Hiring Requirements, Training Requirements
Underpinning Contract (UC)	Service Provider and Third Party Supplier	Response Time Commitments, Escalation Requirements, Pricing

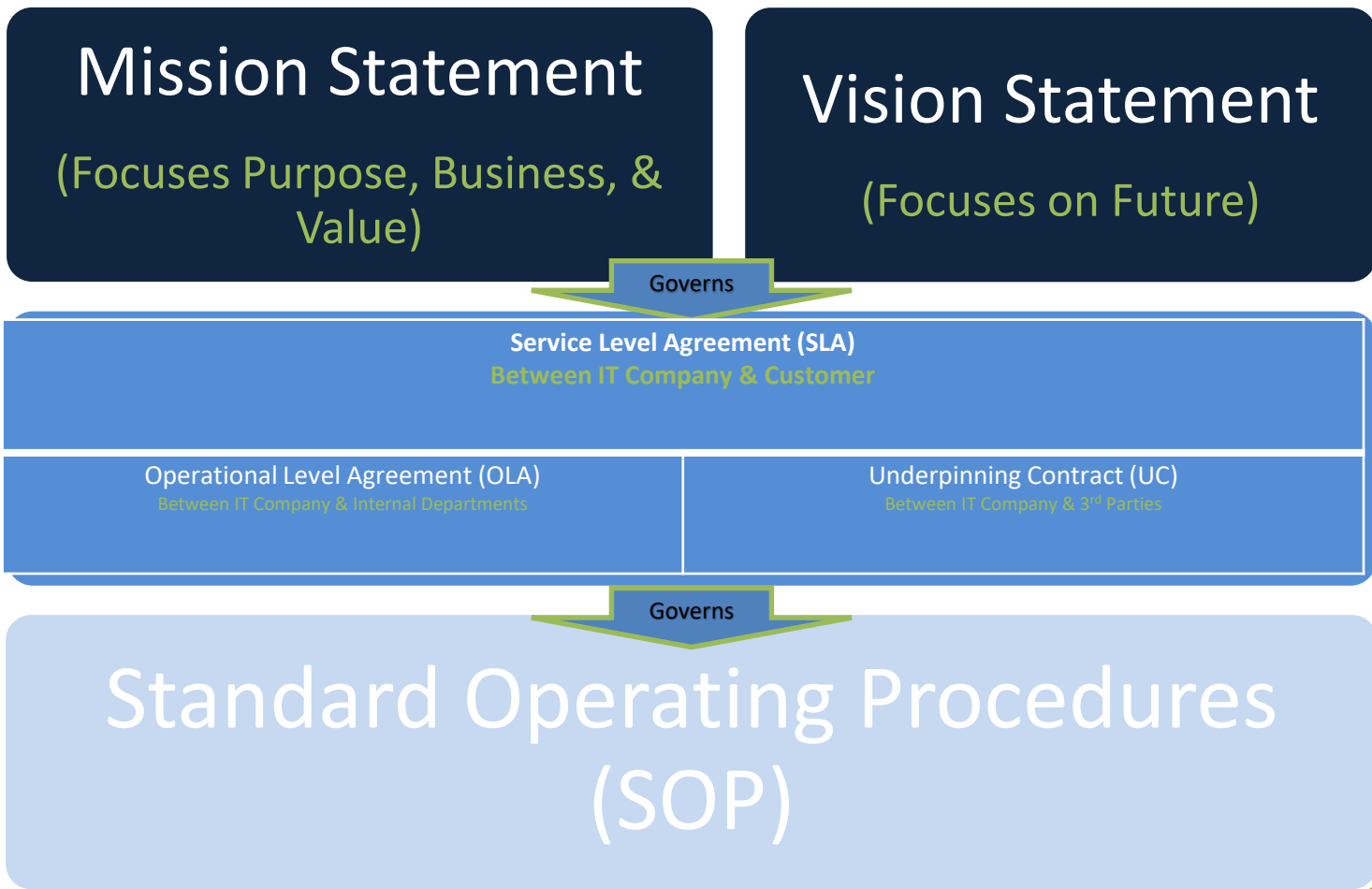
Unit 2 Review: Business Alignment



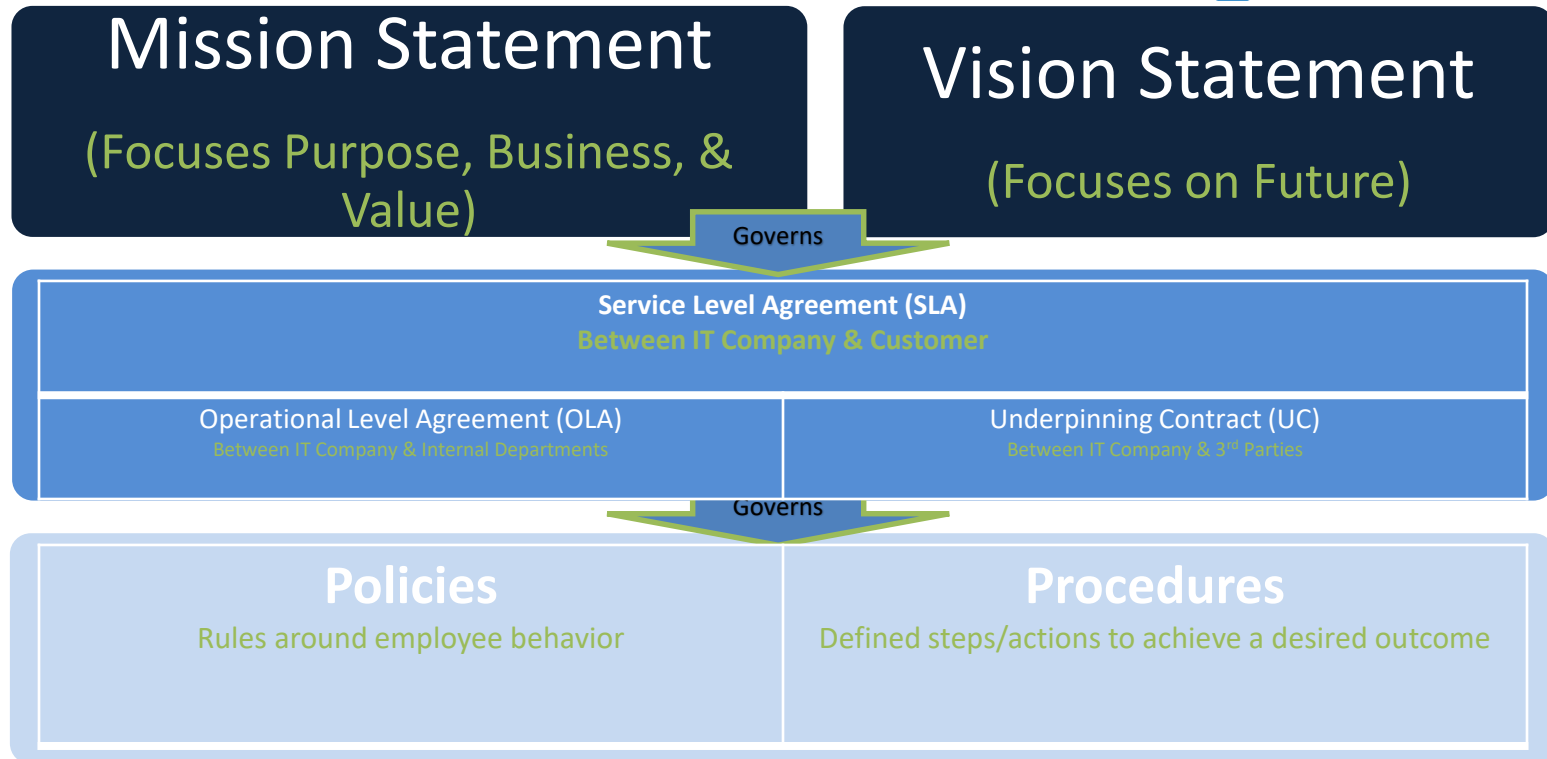
Unit 2 Review: Business Alignment



Unit 2 Review: Business Alignment



Unit 2 Review: Business Alignment



Unit 2 Activity: Interpreting SLAs

Address the example SLA handed out to you to complete the following roleplays and questions.

- **Roleplay 1:**

- Instructor (Customer Role): Call in upset asking why no one answered over the weekend.
- Student 1 (Support Call Role): Explain why no one answered and direct customer where to direct complaints.

- **Roleplay 2:**

- Student 2 (Customer Role): Call in asking for a repair of your new Sony PlayStation 4.
- Student 3 (Support Call Role): Respond offering what services are available.

1. Assuming you take 100 requests per quarter, what is the absolute highest amount of requests can you take that are over 4 hours?

Unit 3

HDI Desktop Support Technician Training

Agenda

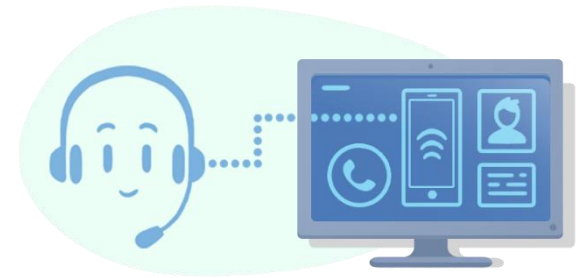
- Introduction
- Unit 3 Key Points
- Unit 3 Review
- Unit 3 Activity
- Unit 3 Quiz



Unit Three:

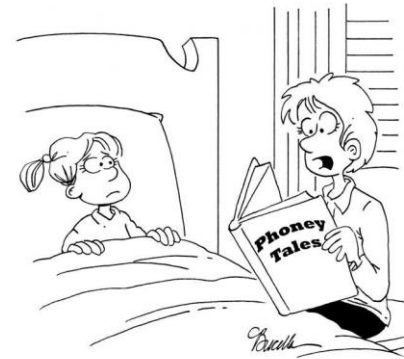
Support Delivery Methods and Technology

- Tools used in an IT Department
 - Telephony Systems and Features
 - Interactive Voice Response
 - Computer Telephony Integration
 - Self-Healing Technology (Automated Remediation)
 - Social Media
 - Cloud Services
- Benefits and Challenges of Systems
- Assisted Technology vs Self-Service Technology



Unit 3 Review: Telephony Tools

1. When calling Byte Back, which of the following technology do we use?
 - Interactive Voice Response?
 - Automatic Voice Recognition?
 - Automatic Call Distribution?



"And the Princess said, 'Please listen carefully as the menu has changed. Press one if...'"

2. Computer Telephony Integration (CTI) Example:
<https://www.youtube.com/watch?v=u4PAAhwSv3c&t=51s>

Unit 3 Review: Telephony Tools

[Answers]

1. When calling Byte Back, which of the following technology do we use?
 - Interactive Voice Response
 - ~~Automatic Voice Recognition~~
 - Automatic Call Distribution

Explanation: when first calling Byte back, you reach a menu that uses **Interactive Voice Response**, which then directs you using **Automatic Call Distribution**. We do not use Automatic Voice Recognition, because that would mean the menu could understand voice responses, and it currently does not, which is why you need to press the number to direct you to the correct person.

Unit 3 Activity:

Applying Technology Understanding

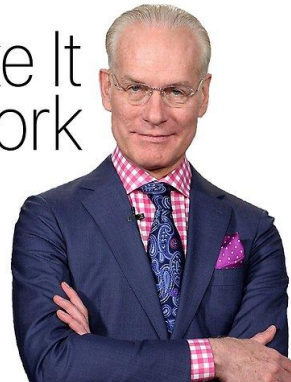
Set Up:

- Split into 2 similarly sized groups of students.
- Now, imagine Byte Back is considering a new business model to create a for profit business.
- Take 10 minutes to outline the suggested technology and explanation of technology choice based on your group's proposal.

Your Proposals

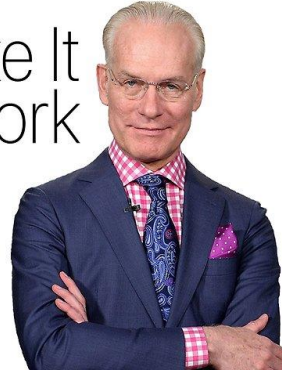
- **Group 1:** Propose for Byte Back to act as a Support Center for PC for Beginner Students. State the technology Byte Back should use to support its PCB students with a limited staff.
- **Group 2:** Propose for Byte Back to act as a Support Center for Tech companies in San Francisco. State the technology Byte Back should use to support these potential SF customers.

Make It
Work



Your Proposals [Answers and Ideas]

Make It
Work



- **Group 1:** Support Center for PCB Students
 - This group should gravitate closer to in person, self-healing and assisted technology. Remote technology would also require computer knowledge. Self healing technology requires no user input, so it's easier for students. As PCB students are newer to technology, they would be less likely to effectively navigate self-service technology. In terms of low staff, by using an effective Automatic Call Distribution and IVR system could help make sure customers are moved efficiently.
- **Group 2:** Support Center for Silicon Valley Tech Companies
 - This should gravitate to remote technology, as traveling to SF would be costly. Telecommunications, Social Media, and Instant Messaging would be effective in these situations.

Unit 4

HDI Desktop Support Technician Training

Unit 4 Agenda

- Unit 4 Overview
- Self-Guided Course
- Different Request Types
 - Review
 - Activity
- Management Types
 - Review
 - Activity
- Unit 4 Quiz

How to fix
any computer

The Oatmeal

<http://theoatmeal.com>



Step 1. Reboot

Did that fix it?
No? Proceed to step 2

Step 2.

Format hard drive.
Reinstall Windows.
Lose all your files. Quietly weep.



Step 1. Take it to an Apple store.

Did that fix it?
No? Proceed to step 2

Step 2. Buy a new Mac.

Overdraw your account. Quietly weep.

Unit Four:

Support Center Processes and Operations

- IT Service Management
- Purpose and activities of ITIL processes
 - Incident Management
 - Problem Management
 - Change Management
 - Service Asset and Configuration Management
 - Release and Deployment Management
 - Access Management
 - Security Management
 - Knowledge Management
 - Quality Assurance

Unit 4 Review: Different Request Types

Video: <https://www.youtube.com/watch?v=Zt6GNAIoUsY>

	Incident Management	Problem Management	Service Request Fulfillment
Purpose	<p>Restore normal service operation as quickly as possible to minimize impact on business operations.</p> <p>Another way this is stated is to return things to 'Normal service operation' which mainly means restore within SLA limits.</p>	<p>Understanding problems to prevent problems from causing disruptions and improve process relating to addressing problems.</p>	<p>Deal and complete requests that are not incidents</p>
Steps	<ul style="list-style-type: none"> • Identification • Logging • Categorization • Prioritization • Diagnosis • Escalation • Investigation and Diagnosis • Resolution and Recovery • Closing 	<p>Root Cause Analysis</p> <ul style="list-style-type: none"> • Identify problem and develop hypothesis • Collect data • Analyze problem • Develop plan of action • Implement plan • Evaluate results • Document steps 	<p>No defined step process, but required to do the following during process:</p> <ul style="list-style-type: none"> • Accepting assigned requests • Logging requests • Determining if any approvals are necessary, and if so, forwarding for approval • Following approved procedures
Benefits	<p>Minimize impact of interruptions in service by restoring service as quickly as possible</p>	<p>Increase availability of IT service and improves resolution times</p>	<p>Reduce downtime & cost for users</p>

Unit 4 Activity: Service? Problem? Incident?

1. You are requested to print out 20 notebooks for an upcoming training. This is an example of...?
 - **Service Request Fulfillment** because no services were affected or needed to be fixed.
2. Several weeks ago, no one at Byte Back could scan do to a server being down. Upon performing root cause analysis, it showed the server was too full. Upon clearing it out, we could all scan again. This was an example of...?
 - **Problem Management** because we addressed the main problem (the server) that was creating the multiple incidents (each time someone wasn't able to scan).
 - a) One of our staff allowed us to use her portable scanner. This was an example of...?
 - **Incident Management** because it allowed people to scan again, but didn't address the problem of the server being down. Without addressing the problem, the incidents would keep occurring.
3. On Monday, no students had an account for HDI, so we gave you all a login of someone else's account. This is an example of...?
 - **Incident Management** because all of you could then access the page, but it didn't address the initial issue of not having accounts. So the initial problem would still cause further incidents down the road (such as accessing the test).
4. Betty ByteBack locked herself out of her account, so she's calling in to have her passwords reset. This is an example of:
 - **Service Request Fulfillment** because everything was working as it should (the password should lock after several failed attempts).

Unit 4 Activity:

Release and Deployment Management

Release and Deployment Management

1. Assume you are in charge of updating the entire company's CRM system, which is required for customer interactions. The update requires the system to be down for an hour. How would you set this up to have minimal impact on this business?
2. What are some bad examples of Release and Deployment Management?

Unit 4 Activity:

Release and Deployment Management [Answers]

1. **Assume you are in charge of updating the entire company's CRM system, which is required for customer interactions. The update requires the system to be down for an hour. How would you set this up to have minimal impact on this business?**
 - Mainly, the update should be scheduled during non-work hours. E-mails should be sent out to the entire staff notifying them of this update.
2. **What are some bad examples of Release and Deployment Management?**
 - The main one that comes to mind is the Galaxy s7 cellphone, which was released but started combusting spontaneously. Students can mention experience where upgrades harmed their hardware/software, or disrupted them during a crucial moment.

Unit 4 Activity: Security Management

Cybersecurity is a major hot topic these days. Companies are always looking for people to secure their data. Lost credit card information, identity theft, and loss of data are examples of what can happen.

1. What companies do you feel most comfortable giving personal information such as your credit card number or SSN? What about those companies makes you feel safe about them?

Unit 4 Activity: Security Management

[Main Idea]

1. What companies do you feel most comfortable giving personal information such as your credit card number or SSN? What about those companies makes you feel safe about them?
 - Mainly think about security policies that help create a strong, secure company.

Some Security policies include:

- Unique login name and password parameters
- Password rest requirements
- Reducing the visibility of credit card information
- Block access to personal information
- Identification badge requirements

Unit 5

HDI Desktop Support Technician Training

Customer Service?

Think of amazing customer service examples in the past, what made them so great?

Now think of some bad examples.

When going through these lessons ,think about techniques that made those great interactions so enjoyable and that could have been applied that would have made those poor examples good.

Agenda

- Introduction
- Unit 5 Key Points
- Unit 5 Review
- Unit 5 Activity



Unit Five: Customer Management Skills

- Best Practices for customer management during incident management process
 - Phone Call Etiquette
 - Hold
 - Transfer
 - Escalation
 - Informing the Customer
 - Leaving a Voice Message

Unit 5 Activity: Don't Do This

<https://www.youtube.com/watch?v=HUADnftSdg0>

1. What could have gone better?
2. If the customer was able to be transferred to the manager, what type of escalation would this be?

Unit 5 Activity: Don't Do This [Answers]

1. What could have gone better?
 - Poor intro, it'd be best to give name and sound enthusiastic. Tell the customer how long they will be put on hold and get confirmation to be put on hold. Be nicer overall.
2. If the customer was able to be transferred to the manager, what type of escalation would this be?
 - Hierarchical escalation, as it's going to a higher authority.

Unit 5 Activity: Transfer Time

Following up on that poor service call, let's assume things went better you are allowing the customer to discontinue their service, but you cannot authorize that yourself, so you need to transfer to another agent. Let's practice that transfer.

Roles:

- Customer: Instructor
- Agent 1: Choose a Student
- Agent 2: Choose a different Student

Relevant Information

- Support Center Number:
202-601-7938

1. Agent 1: Put the customer on hold.
2. Agent 1 to Agent 2: Explain to the person you are transferring to the situation.
3. Agent 2: Provide a professional greeting and repeat the situation to the customer in their own words.

Unit 5 Activity: Transfer Time

[Main Idea]

1. Agent 1: Put the customer on hold.
 - Ask customer for permission.
 - Provide a valid reason why.
 - Give customer a reasonable time frame to expect someone to return the call.
 - Wait for a response.
 - Thank customer for holding when you return to the call.
2. Agent 1 to Agent 2: Explain to the person you are transferring to the situation.
 - Mainly explain the situations concisely and in a non-judgmental manner.
3. Agent 2: Provide a professional greeting and repeat the situation to the customer in their own words.
 - The user should give their name, verify the caller's identity, and state the situation in their own words.

Unit 6

HDI Desktop Support Technician Training

Agenda

- Introduction
- Unit 6 Key Points
- Unit 6 Review
- Unit 6 Activity



Unit Six: Communication Skills

- Positive Body Language
- Active Listening
- Paraphrasing
- Matching communication Style
- Communication process
- Effectively documenting incidents
- E-mail Etiquette
- Addressing different languages

Unit 6 Activity: E-mail Error

<https://www.youtube.com/watch?v=JbznIK2zsDw>

Let's assume one day, Sam Student is late for class one day due to needing to take care of her children, and sends Nancy and Eliana the following e-mail:

Yo can't make it, my bad. Can't wait to see ya'll
2morrow. ;)

Now, work together to compose a more appropriate, professional e-mail.

Unit 6 Activity: E-mail Error

[Activity]

Bad E-mail:

Yo can't make it, my bad. Can't wait to see ya'll 2morrow. ;)

Improved E-mail:

Dear Mr. Szymkowicz,

My apologies, I will be unable to attend class this morning because there was an issue I had to attend to with my child's school. In the meantime, I'll review the materials we were scheduled to go over today and connect with a classmate. I'll bring any questions I have to you tomorrow. See you and everyone else tomorrow.

Sincerely,

Student

Effective e-mail communication includes:

- Understanding your audience so that you can tailor and optimize message content
- Labeling your message with a subject line that reflects the message content
- Structuring your message so that it's easy, quick to read and understand—include an opening, bullet points, and closing
- Using clear, concise business language so that your message is communicated effectively
- Proofreading your message before you send it to ensure it is communicating what you intend
- Using plain text and avoid fancy fonts, colors, and RTF or HTML formatting
- Including the original message with replies to provide a context for the message
- Using appropriate punctuation
- Avoiding abbreviations (e.g., "BTW" instead of "by the way") and emoticons
- Using appropriate capitalization (avoiding the use of all capital or all lower-case letters)

Unit 6 Activity: Lost In Translation

<https://www.youtube.com/watch?v=gD7xQGXpSBg>

1. What communication barrier was interfering here?
2. How could the phone call have been better handled on the user side?

Unit 6 Activity: Lost In Translation

[Answers]

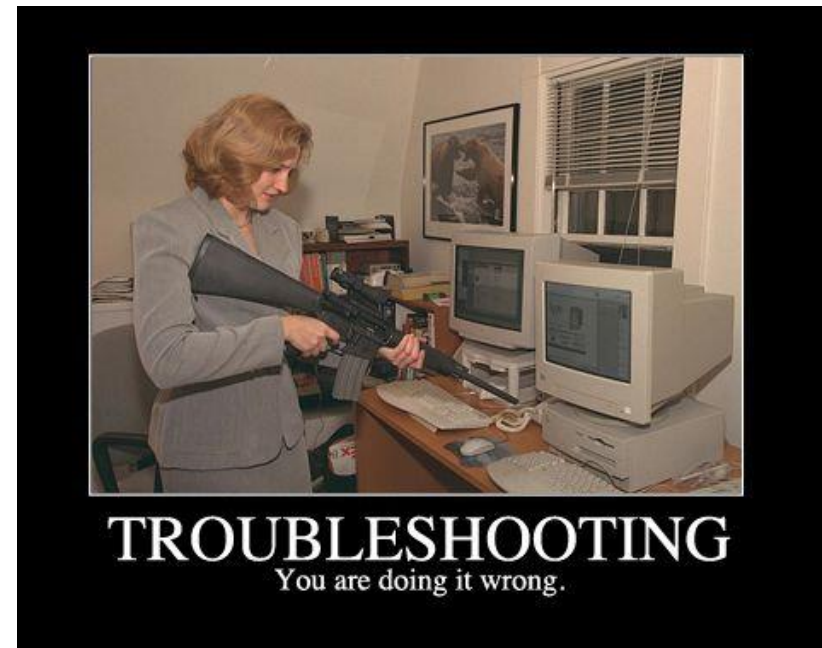
1. What communication barrier was interfering here?
 - Mainly cultural/language barrier, stopping the customer from understanding the form correctly, thereby stopping them from understanding what the user was saying.
2. How could the phone call have been better handled on the user side?
 - The user should have:
 - More friendly tone.
 - Connected with the customer using their terminology.
 - Not interrupted the customer.
 - Not ended the phone call saying it's okay to call a lawyer.

Unit 7

HDI Desktop Support Technician Training

Agenda

- Unit 7 Overview
- Unit 7 Review
- Unit 7 Activity



Unit Seven: Problem-solving and Troubleshooting Skills

- On Site Visit Best Practices
- Customer Competency Levels
- Creative Thinking
- Critical Thinking
- Open-Ended and Close-Ended Questioning
- Differentiate between deductive and inductive reasoning

Unit 7 Review: Un(Conscious) In(Competence)

To Determine the Competency Level of a Customer, ask yourself 2 questions:



Do they know what they're trying to do?

- Yes-Competent
- No-Incompetent



Are they aware they know/don't know?

- Yes-Conscious
- No-Unconscious

Unit 7 Review:

Visual Representation of Competency Levels

Unconscious Incompetence

- “I don’t know what I don’t know”
- Can’t describe what’s going on or what they did to get there



Unconscious Incompetence

- “I know what I don’t know”
- Can somewhat explain situation, but may use words incorrectly
 - “I was using Windows as my internet browser.”



Conscious Competence

- Understand process and realize technology is complex, so seeking your support
- Generally easiest type of customer to work with



Unconscious Competence

- Second Nature
- Most likely to use technical jargon

<https://www.youtube.com/watch?v=H-ID6d0bdDE&t=58s>

Unit 7 Activity: Closing Time

Roles:

- Instructor: Customer
- Class: User

Instructions:

- Use close-ended questions to determine the computer issue within 3 minutes.

Unit 7 Activity: Closing Time [Main Idea]

Main Idea: Be effective with understanding and using close ended questions to guide the customer.

Examples of close-ended questions:

- Can you see the icon on your screen?
- Is your monitor turned on?
- Is today the first time you experienced this problem?
- Which application are you having a problem with?
- What type of printer do you have?

Unit 8

HDI Desktop Support Technician Training

Agenda

- Unit 8 Overview
- Unit 8 Review
- Unit 8 Activity



Unit Eight: Maximizing Your Effectiveness

- Empathizing with a customer
- Dealing and disengaging with irate customers
- Positive Service Attitude
- Emotional Hijack
- Time Management
- Emotional Intelligence

Unit 8 Review: Customer Champions

Lets focus on the positive and see some amazing customer service representatives. Discuss what they did well.

Example 1:

<https://www.youtube.com/watch?v=Xi44fYgJYSU>

Example 2:

<https://youtu.be/MwpFpWlGCas?t=80>

Unit 8 Activity:

User vs. Customer

Roles:

- Student A=Upset Customer
- Student B=Friendly User

Instructions

The upset customer call in with a complaint about the wait time while trying to get their password reset, being as rude as possible (keep it PG, though, and no death threats). The Friendly User will be as nice as possible, not letting the customer get to them. Let the call go on for a maximum 3 minutes.

Who Won?



Unit 8 Activity:

User vs. Customer

[Main Ideas]

Review Competencies 5.20.1-5.20.12:

Some main ideas include:

- Use Customer name to gain focus
- Be empathetic, respectful
- Offer win-win solution
- Paraphrase customer
- Customer Differentiation
- Display Confidence



Unit 8 Activity:

Meeting Your KPIs

It's end of the fiscal year and the company is reviewing their annual Key Performance Indicators to measure their achievement of organizational goals. Here's the results:

Topic	KPI Target	Annual Results
Customer Satisfaction *Based off ongoing surveys*	90%	69%
SLA Compliance Rate	95%	97%
First Contact Resolution (FCR)	70%	65%
Mean Wait Time	4 minutes	7 minutes
Mean Time to Resolve Issue	4 hours 30 minutes	4 hours 17 minutes

1. Where is the company underperforming?
2. What are some ways Customer Satisfaction could be increased?
3. How could the company increase their First Contact Resolution?
4. What metric could the company look at to determine staffing needs to address the mean wait time issue?
5. The company needs a way to better track agent availability, what technology can they use?

Unit 8 Activity:

Meeting Your KPIs

[Answers]

1. **Where is the company underperforming?**
 - They are not meeting KPIs for Customer Satisfaction, First Contact Resolution, and Mean Wait Time.
2. **What are some ways Customer Satisfaction could be increased?**
 - They could work to decrease the mean wait time. Also request for students to describe certain customer service techniques (paraphrasing, using a polite tone, how to transfer customers effectively, etc.)
3. **How could the company increase their First Contact Resolution?**
 - The main answer is knowledge management. By providing training, more users could likely deal with customer issues. They can look at the article with the highest number of reviews to see the main issues that need to be addressed.
4. **What metric could the company look at to determine staffing needs to address the mean wait time issue?**
 - Average Handle Time.
5. **The company needs a way to better track agent availability, what technology can they use?**
 - They can use the Telephony Tool of Automatic Call Distributor (ACD), which also can route calls effectively.