



# HDI Desktop Support Technician

CERTIFICATION STANDARD & SELF-STUDY GUIDE

*Official Curriculum*





Desktop Support  
Technician

# **HDI Desktop Support Technician Certification Standard**

*A Self-Study Guide*

Version 3.1

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Version 3.1  
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Printed in the United States of America.  
ISBN: 978-1-57125-109-1

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# Overview

## Acknowledgements

Many thanks to the following people and companies for their time and assistance in participating on the HDI International Standards Committee:

Roy Atkinson  
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Darrell Bond  
Radar Solutions  
Canada

Rae Ann Bruno  
Business Solutions Training

Cinta Caputto  
HDI Brasil

John Custy  
JPC Group

Nathan Harvey  
FedEx Kinkos

Robert Homer  
Providence Health and  
Services Alaska

Drew Jaehnig  
Department of Defense

Rick Joslin  
HDI

Katherine Lord  
Gartner

Jason Lorenz  
C3i, Inc.

Andy McGovern  
Macrovision UK

Fancy Mills  
Independent Consultant

Chris Meadows  
Lowes

Simone Moore  
Help Desk Association  
Australasia (HDAA)

Mike Rabinowitz  
HDI

Artur Sygnatowicz  
HDI Poland

## Introduction

HDI certification exams are based on an HDI certification standard. The competencies for the certification standards were identified and approved by the HDI International Certification Standards Committee (ICSC), a group of industry experts and experienced practitioners from a number of organizations.

It is the committee's intent to recognize the breadth of knowledge required, document the needed skills, and provide leadership to the support industry on the meaning of a certification for customer service and technical support. Each HDI certification standard is an open international certification standard that is independent of any training curriculum.

## An HDI Standard

HDI bases its certifications on open international industry standards, and is independent of any training curriculum.

- **Open** implies that the standards are published, allowing organizations to leverage the standards to improve their services, individuals to study the standards in preparation for a certification exam, and training and consulting providers to develop offerings that align with the standards.
- **International** indicates that a committee of professionals that have international experience and/or work for global companies has developed the standards, and that the standards are recognized in the global market.
- **Industry** refers to the service and support industry, which initially focused on internal support of information technology and later expanded to include external support organizations.
- **Standard** defines the knowledge that a support professional in a specific role is expected to know, and a set of best and common processes and practices within a support center.

As of 2011, the ICSC has developed standards for the following positions:

- HDI Customer Service Representative (HDI-CSR)
- HDI Support Center Analyst (HDI-SCA)
- HDI Desktop Support Technician (HDI-DST)
- HDI Support Center Team Lead (HDI-SCTL)
- HDI Support Center Manager (HDI-SCM)
- HDI Desktop Support Manager (HDI-DSM)
- HDI Support Center Director (HDI-SCD)

HDI is also pleased to offer the following certifications:

- KCS Principles
- KCS Foundation
- HDI Problem Management Professional (HDI-PMP)
- HDI Technical Support Professional (HDI-TSP)
- HDI Certified Instructor (HDI-CI)
- ITIL Foundation

HDI is committed to defining standards for additional support professional roles as the industry evolves and its needs change. In business today, customers want educated and certified professionals to support their business needs. Certification provides:

- Validation of current knowledge and skill sets
- Evidence of excellence achieved in your field
- Professional development
- Personal pride
- Credentials that travel

## How Is an HDI Standard Organized?

A role-based certification standard is aligned with the elements of the HDI Support Center Standard and all the HDI support center suite certifications align to the European Foundation for Quality Management (EFQM) framework, with modifications to meet the quality requirements of support centers. Each **element** is a category within the standard. The last three elements of the HDI Support Center Standard are closely related and have been combined into a single category within the role-based standards. This means HDI role-based standards are organized into six categories: (1.0) Leadership, (2.0) Strategy and Policy, (3.0) People Management, (4.0) Resources, (5.0) Process and Procedure, and (6.0) Performance Results. Each category contains a list of topics that share a common focus or relate to a specific concept. Within each topic are one or more **competencies**. For each competency, there is a **range of knowledge**.

Take a look at the following example from the HDI Support Center Analyst standard:

(Category) 1.0 Leadership		
Topic	Competency	Range of Knowledge
1.1 Leadership Principles	1.1.1 Identify the characteristics of an effective leader.	An effective leader: <ul style="list-style-type: none"> <li>• Leads by example</li> <li>• Motivates others</li> <li>• Encourages participation, creative thinking, and initiative</li> <li>• Demonstrates a positive attitude</li> <li>• Practices active listening skills</li> <li>• Displays ethical behavior</li> </ul>

If one approaches the standard as if they were interviewing for a position in a support center, the **competency** would be either a specific question or a concept that an interviewer would ask in the interview process, and the **range of knowledge** would be the expected answer. In other words, it is expected that someone in a specific support center position will possess the range of knowledge for each competency.



To cover a range of knowledge completely for some competencies would be an endless task (e.g., “Identify characteristics of leadership”). In such cases, the HDI International Certification Standard Committee (ICSC) has either defined the information in the range of knowledge to cover information that is common knowledge or has provided examples that relate to the competency. An experienced professional should be able to expand upon the range of knowledge.

It is also common to have a similar set of competencies in more than one certification standard, with the range of knowledge varying between standards. For example, the standard for a support center analyst and a support center manager may include the competency, “Describe the process of change management.” The range of knowledge for this competency will differ in each of the standards. The standard for the support center analyst may include an awareness of the change management process, while the standard for a support center manager may contain a more detailed description of how to use the change management process within the support center.

The following section provides a description of each standard category.

## **HDI Standard Category Descriptions**

### *1.0 Leadership*

Leadership defines how managers and employees guide their organizations towards success by inspiring and motivating employees. Support personnel should understand why their job is important, receive satisfaction from their work, and feel supported and valued for their efforts by management. Effective leaders guide the formulation and evolution of statements of purpose, and ensure that they are communicated and understood throughout the entire organization. They provide highly visible support and encouragement. Important leadership skills include fostering meaningful teamwork, resolving communication issues, determining resource requirements, determining priorities, and inspiring an environment of cooperation and enthusiasm.

### *2.0 Strategy and Policy*

The vision, mission, goals and objectives of the support center’s functions must clearly and effectively support the business purposes of the organization. As with any business activity, goals and activities must all contribute to the organization’s ability to achieve its stated goals. It is also essential that any support function be fully integrated into the IT organization. Policies and strategies must translate into goals and objectives that can be acted upon, measured and revised as required to achieve desired results. Specific plans, policies and procedures must be established to define the way in which the organizational goals will be achieved. To be useful, plans must lead to the achievement of measurable results and be coordinated with the plans of the organization.

### *3.0 People Management*

An important responsibility of support management is the creation of an environment that motivates people (staff) to perform at their peak. Staff roles and responsibilities, as well as support processes, must be well documented. The support staff must have and continue to evolve the required competencies needed to respond effectively to business requirements. Performance feedback, peer and management recognition, corporate communication, and opportunities for technical and professional growth are proven motivators.

### *4.0 Resources*

The support operation must have access to the resources and tools necessary to achieve the established objectives. These may be infrastructure-related or support-specific. They include financial and human resources, physical facilities, communications infrastructure and processes, specialized organizational knowledge and competencies, hardware/software tools, and/or third-party partnerships. Support technology such as service management systems, knowledge bases, self-help tools, remote access tools, self-help Web tools, self-healing software, and ACDs can provide significant increases in support center efficiency and end user/customer productivity, which translates directly to cost savings, superior service, or both.

### *5.0 Process and Procedure*

The support center must have processes and procedures in place that enable it to achieve its goals and objectives. These processes must be measurable, documented, communicated, and understood by those who will manage and execute them. Examples of support center processes include proactive detection and remediation, self-service, customer satisfaction management, service level management, feedback management, incident and service request handling, problem management, change management, asset and configuration management, continuous improvement, service continuity management, and call and incident monitoring.

### *6.0 Performance Results*

Performance results are the measured achievements as compared to goals. Measurement processes must be objective, reliable and realistic. Results must be clearly communicated to the appropriate audiences. Performance objectives and results must be achieved, or the reasons for any variance must be clearly understood and appropriate actions taken to achieve the standard or revise it.

## How Do I Prepare for the Certification Exam?

There are two options available that will assist one in preparing to take a certification exam. Attending a training course is the preferred option for most candidates seeking certification. Training will assist course participants in preparing to take a certification exam while also building skills valuable to one's profession in the support industry. Training will help the candidate understand the best practices and concepts that have been captured within an HDI standard as well as how to apply them within the workplace. HDI offers the following training delivery methods:

- **Instructor-Led Training:** Instructor-led training is offered by HDI and HDI partners in both public classroom settings and private onsite training settings. Some organizations elect to have an internal trainer earn the HDI Certified Instructor status in order to deliver the course in-house for their employees.
- **Online Self-Paced Training:** The distance learning option of an online self-paced course provides maximum flexibility for the candidate. This type of training can be done anytime and anywhere one has internet access.
- **Blended Learning:** A blended learning option mixes the flexibility of online course training with scheduled instructor-led virtual classroom sessions. Using Web conferencing technology, the virtual classroom sessions allow instructor-led review and course participant interaction without leaving the office or home.

While the training delivery option assists one in preparing to take the certification exam, the candidate must study the HDI standard. Remember, the exam is based on the HDI standard and not the training offering. The second option available for preparing to take a certification exam is using the Certification Standard & Self-Study Guide.

### *How Do I Use the Certification Standard & Self-Study Guide to Prepare for the Exam?*

When studying the standard, use the competencies as review questions; try to answer the question before reading the range of knowledge. If your answers do not match the range of knowledge for that competency, then mark that competency for further review. Individuals with the appropriate experience as a support professional can study the HDI standard and successfully pass the certification exam to become HDI Certified.

### *Is a Practice Test Available?*

A practice test is included with the self-study guide. The practice test allows the candidate to become familiar with the types of questions that make up the certification exam pool. For each multiple-choice question, there will be four possible answers, of which only one is correct.

HDI also offers online practice tests for a number of its certification exams. Please visit our Web site ([www.ThinkHDI.com](http://www.ThinkHDI.com)) for course availability and pricing. However, please note that the practice tests are intended to be used as preparation aids only; success on a practice test should not be interpreted as full preparation for a certification exam. Certification exam questions are typically more challenging than the questions included in the practice tests.

### *What Should I Expect from the Certification Exam?*

HDI certification exams are randomly generated from a pool of pre-authorized exam questions. As a result, each certification exam is different.

- Each HDI certification exam consists of sixty-five (65) multiple-choice questions.
- Candidates will have seventy-five (75) minutes to complete the exam.
- The passing score for the certification exam is 80%. HDI Certified Instructors must achieve a 90% or better to qualify to facilitate HDI training courses.
- For candidates taking the certification exam on the HDI Online Learning Center, you will have twelve (12) weeks to take the exam before your IDs and passwords expire.
- For candidates taking the certification exam through the HDI Learning Center, if you do not pass the exam, there is a \$99 fee to retake the exam; if the twelve weeks have expired, there is a \$50 fee for a 30-day extension.

### *Are Certification Exams Weighted?*

All HDI certification exams are weighted. The exam questions are classified according to the categories contained in the standards. The certification exam is designed to test the candidate's mastery of the knowledge in each category. The number of questions representing each category is determined by a preset weighting rubric. If you have limited time to study for the exam, consider focusing your review on the categories that have the highest weight percentage.

The HDI Desktop Support Technician certification exam is weighted as follows:

Category	Weighting %
1.0 Leadership	10%
2.0 Policy and Strategy	5%
3.0 People Management	10%
4.0 Resources	20%
5.0 Process and Procedures	50%
6.0 Performance Results	5%

If you have any additional questions, please contact the HDI Customer Care Center at 800-248-5667 in the US or 00-1-719-268-0174 worldwide, or e-mail us at [Support@ThinkHDI.com](mailto:Support@ThinkHDI.com).

## More About HDI Practice Tests

### *What is a Practice Test?*

Practice tests are a tool for learners to understand their knowledge of the HDI individual certification exam competencies. The practice test questions are representative of the type of questions asked on an HDI certification exam, but will not be the exact same questions. The practice test questions, while similar to the certification exam, have the goal of self-assessment of the individual competencies, and are not intended to provide a complete sample of all the types of questions that might be asked.

Each question references a specific competency within the standard. Should the person miss the question, they know which competency to review. Each online practice test is 30 questions and must be completed in 35 minutes. Once you complete a practice test, you will know which questions you answered incorrectly and what competency within the HDI Standard you should review. You may take multiple online practice tests. Each online practice test is randomly generated from a pool of test questions. As a result of random generation, test questions may appear on multiple tests.

### *What is the difference between the online practice test and the practice test in the appendix of the student courseware?*

Both the online practice tests and the hardcopy in the books are designed to help the student in the learning process. The practice test in the appendix of the book is 30 questions. Each time you take an online practice test 30 questions are randomly generated from the pool of practice test questions, which allows a more comprehensive assessment of the complete standard than what is available in the courseware appendix or published standard and self-study guide. The online practice test uses the same interface as the certification exam, which also allows the student to become familiar with the testing application. Students may take multiple online practice tests. Only one practice test is provided in the student courseware.

### *What is the difference between the practice test and the certification exam?*

There are separate pools of questions for the practice tests and the certification exams. Questions from the certification exam will not appear on the practice test. (Questions from the hardcopy appendix in the student courseware may appear on the online practice test.) Questions for both the online practice test and the certification exam are randomly generated. The certification exam is 65 questions and must be completed in 75 minutes. Each practice test is 30 questions and must be completed in 35 minutes.

The practice test is designed as a learning and assessment tool. When a student completes the online practice test, they are told which questions they answered incorrectly and what competency within the HDI Standard they should review.

The certification exam is an audit of the candidate's knowledge. When an individual completes the certification exam they are presented with a pass/fail score and are informed how well they did in each category for the HDI Standard. They are not informed which question(s) they answered incorrectly.

### *How are practice tests similar to certification exams?*

The practice test is designed to be similar in structure to the certification exam. They both use multiple choice questions based on the same criteria for testing. Each question is presented with four (4) potential answers, and only one correct answer. Both the online practice test and the certification exam utilize the same user interface, thus allowing the candidate a chance to become familiar with the testing system prior to taking the certification exam. Both are timed. If questions are not answered prior to the expiration of the timed test/exam, then the questions will be scored as incorrect when calculating the score. Both are meant to be taken from memory without notes, courseware, or other reference materials and both are based on the same HDI individual certification standard; not the training courseware. Questions are designed to test the candidates understanding and ability to apply the certification standard—not their memorization of it.



### *Is passing a practice test a good indicator that one will pass the certification exam?*

Passing a practice exam is a good indicator that the candidate understands the specific competencies presented; however, there are only 30 questions in the workbook sample which does not address the full range of the competencies. Passing multiple online practice tests is a demonstration that you are prepared to take the certification exam. Failing to pass a practice test is a good indicator that you are not ready to take the certification exam.

The practice test question pool is separate from the certification exam question pool. The same questions do not exist in both pools. Questions in both pools are based on the same certification standard and written with the same style guidelines.

There is no attempt to have a one to one correlation of questions to the same competencies within the two question pools. Some competencies may be covered in only one question pool; some competencies are addressed in both question pools. Candidates are advised to study the certification standard and courseware to prepare for a certification exam, and not rely on their ability to pass a 30 question practice test as the sole indicator of the probability of their future success on the certification exam.

### *Why did HDI develop practice tests?*

HDI developed practice tests because some learners require additional resources to prepare for the certification exams and customers requested practice tests. HDI decided to satisfy this need directly and provide a practice test in the student courseware and an enhanced online practice test option.

### *What about third party test preparation vendors?*

There are companies in the market that provide sample tests for various certifications. While some of these sites may be legitimate, some are known as test theft sites. They steal and publish actual test questions as preparation questions. Candidates are unaware that they may be cheating on their certification exam by using a questionable third party provider. These companies may also be using test questions that are not reflective of our current or most up to date certification standard. HDI recommends that candidates study from official HDI curriculum.



Topic	Competency	Range of Knowledge
<b>1.0 Leadership</b>		
1.1 Leadership Principles	1.1.1 Identify the characteristics of an effective leader.	<p>An effective leader:</p> <ul style="list-style-type: none"> <li>• Leads by example</li> <li>• Motivates others</li> <li>• Encourages participation, creative thinking, and initiative</li> <li>• Demonstrates a positive attitude</li> <li>• Practices active listening skills</li> <li>• Displays ethical behavior</li> </ul>
	1.1.2 Identify ways to exhibit personal accountability.	<p>Ways to exhibit personal accountability include:</p> <ul style="list-style-type: none"> <li>• Taking ownership of incidents or service requests</li> <li>• Admitting to errors</li> <li>• Adhering to a work schedule</li> <li>• Knowing your responsibilities and fulfilling them</li> <li>• Meeting personal commitments</li> <li>• Adhering to organization policies and procedures concerning dress and performance of duty</li> <li>• Representing the organization positively outside the regular work environment</li> </ul>

Topic	Competency	Range of Knowledge
	1.1.3 Identify techniques to best manage your work life.	<p>To best manage your work life:</p> <ul style="list-style-type: none"> <li>• Be on time or early with every assignment or meeting</li> <li>• Always approach your manager with solutions, not problems</li> <li>• Trust your manager—you may not understand why a specific decision is made</li> <li>• Increase your problem solving and critical thinking skills by taking good physical care of yourself (i.e., sleep, exercise, eating healthy)</li> <li>• Acknowledge those around you for their dedication</li> <li>• Identify ways to assist your manager with new projects to build trust</li> </ul>
1.2 Ethics	1.2.1 Describe ethical behavior in a support center.	<p>An ethical support center environment is characterized by support professionals who:</p> <ul style="list-style-type: none"> <li>• Provide consistent service to all customers</li> <li>• Demonstrate honesty and integrity in their actions</li> <li>• Take ownership and hold themselves personally accountable for their actions</li> <li>• Fulfill commitments</li> <li>• Protect and enhance the image of the support center</li> <li>• Are loyal to their team</li> </ul>

Topic	Competency	Range of Knowledge
1.3 Time Management	1.3.1 Identify strategies for multitasking in a support environment.	Multitasking in a support environment includes the ability to: <ul style="list-style-type: none"> <li>• Switch between tasks smoothly throughout the day</li> <li>• Prioritize tasks throughout the day as circumstances require, with minimal supervision</li> <li>• Organize work effectively</li> </ul>
	1.3.2 Explain how to manage the use of your time efficiently.	Techniques to improve and manage the use of your time include: <ul style="list-style-type: none"> <li>• Planning projects and activities in advance</li> <li>• Prioritizing tasks to ensure that you spend time on tasks that contribute to the achievement of your goals</li> <li>• Addressing the most important action items first</li> <li>• Accurately estimating and planning how long non-routine tasks will take</li> <li>• Being more efficient when performing routine tasks</li> <li>• Using a time management tool or daily “to-do” list</li> <li>• Learning to say “no” when appropriate</li> <li>• Directing “walk-up” interactions to the proper support channels</li> <li>• Prioritizing incidents based on business impact</li> </ul>

Topic	Competency	Range of Knowledge
1.4 Written Communica- tion	1.4.1 Identify considerations for effective use of e-mail communication.	<p>Effective e-mail communication includes:</p> <ul style="list-style-type: none"> <li>• Understanding your audience so that you can tailor and optimize message content</li> <li>• Labeling your message with a subject line that reflects the message content</li> <li>• Structuring your message so that it's easy, quick to read and understand—include an opening, bullet points, and closing</li> <li>• Using clear, concise business language so that your message is communicated effectively</li> <li>• Proofreading your message before you send it to ensure it is communicating what you intend</li> <li>• Using plain text and avoid fancy fonts, colors, and RTF or HTML formatting</li> <li>• Including the original message with replies to provide a context for the message</li> <li>• Using appropriate punctuation</li> <li>• Avoiding abbreviations (e.g., “BTW” instead of “by the way”) and emoticons</li> <li>• Using appropriate capitalization (avoiding the use of all capital or all lower-case letters)</li> </ul>
1.5 Stay Informed	1.5.1 List ideas for staying informed about industry trends and best practices.	<p>A support professional can stay informed about the industry by:</p> <ul style="list-style-type: none"> <li>• Attending courses and seminars</li> <li>• Networking with other professionals at industry events</li> <li>• Subscribing to industry publications</li> <li>• Joining industry groups</li> <li>• Subscribing to or participating in online discussion groups</li> </ul>

Topic	Competency	Range of Knowledge
1.6 The Role of the Desktop Support Technician	1.6.1 Identify ways a DST can deliver consistent, quality customer service.	<p>A DST delivers consistent, quality customer service by:</p> <ul style="list-style-type: none"> <li>• Receiving and resolving incidents and service requests in a timely manner</li> <li>• Updating incidents in a timely manner with appropriate troubleshooting and resolution information</li> <li>• Understanding the business impact of specific incidents</li> <li>• Making specific commitments, then consistently meeting or exceeding those commitments, while remaining faithful to organizational policies</li> <li>• Resolving or assisting in resolving incidents within established service levels</li> <li>• Enhancing the customer's relationship with the support center and organization</li> <li>• Promoting the image of the support center</li> <li>• Identifying and drafting solutions for the knowledge base</li> </ul>

Topic	Competency	Range of Knowledge
	<p>1.6.2</p> <p>Describe the primary responsibilities of the desktop support technician in the support organization.</p>	<p>A DST is responsible for:</p> <ul style="list-style-type: none"> <li>• Understanding the mission and goals of the support organization</li> <li>• Communicating any issues/concerns to support center management</li> <li>• Following desktop support policies and procedures</li> <li>• Reporting any inaccuracies or incorrect data to support center management</li> <li>• Representing desktop support in a professional manner</li> </ul>
	<p>1.6.3</p> <p>Describe the role of desktop support in the organization.</p>	<p>The role of desktop support is to:</p> <ul style="list-style-type: none"> <li>• Serve as an escalation point from the service desk for incidents and service requests</li> <li>• Execute or facilitate the Incident Management and Request Fulfillment processes</li> <li>• Communicate with users in terms of providing information, advice, and guidance</li> </ul>

Topic	Competency	Range of Knowledge
	<p>1.6.4</p> <p>Explain the value of desktop support to the organization.</p>	<p>Desktop support provides value to the organization by:</p> <ul style="list-style-type: none"> <li>• Improved customer satisfaction with IT Services</li> <li>• Serving as the face of IT support center to most users</li> <li>• Improved teamwork and communication</li> <li>• Proactive approach to service provisioning</li> <li>• Reduced negative impact on the business through Incident, Request, and Access Management processes</li> <li>• Improved usage of IT support resources and increased productivity of business personnel</li> </ul>

Topic	Competency	Range of Knowledge
1.7 Global Perspective	1.7.1 Explain techniques for face-to-face cross-cultural communication.	<p>To communicate more effectively across cultures:</p> <ul style="list-style-type: none"> <li>• Listen actively</li> <li>• Match the customer's communication style</li> <li>• Avoid negative body language, such as a closed-off position or crossed arms</li> <li>• When speaking, maintain eye contact and stand up straight</li> <li>• Use standard language expressions (i.e., eliminate slang) and simple sentences</li> <li>• Moderate the pace of the conversation</li> <li>• Let customers know if you have any difficulty understanding them</li> <li>• Pause to consider what is being said to better understand the customer</li> <li>• Encourage the customer to ask for clarification throughout the conversation</li> <li>• Ask the customer to repeat the question</li> <li>• Use closed-ended questions to verify understanding</li> <li>• Paraphrase the customer's question or request in your own words to verify your understanding</li> </ul>



Topic	Competency	Range of Knowledge
	1.7.2 Identify the impacts of language barriers when communicating with customers.	A language barrier can lead to: <ul style="list-style-type: none"> <li>• The support professional misunderstanding the customer's situation/problem</li> <li>• The customer misunderstanding the instructions from the support professional</li> <li>• The customer or the support professional becoming frustrated</li> <li>• Poor customer satisfaction</li> <li>• Unintended insults</li> <li>• Miscommunication</li> <li>• Increased risk of escalation</li> </ul>
	1.7.3 Identify options used for language assistance.	Options available for language assistance include: <ul style="list-style-type: none"> <li>• Translation applications or services <ul style="list-style-type: none"> <li>- Web-based translation tools</li> <li>- PC tools</li> </ul> </li> <li>• An interpreter <ul style="list-style-type: none"> <li>- Other support center staff</li> <li>- Other people at the customer's site or at the support center who have an understanding of the language</li> </ul> </li> </ul>

Topic	Competency	Range of Knowledge
	<p>1.7.4</p> <p>Explain when to obtain assistance when supporting a customer whose primary language is different than your own.</p>	<p>You should obtain assistance when supporting a customer whose primary language is different than your own whenever:</p> <ul style="list-style-type: none"> <li>• Frustration levels are increasing</li> <li>• The customer's volume increases</li> <li>• The customer exhibits negative body language by crossing arms, avoiding eye contact, and/or shifting their stance</li> <li>• There is little or no understanding between you and the customer</li> <li>• The words the customer is using do not seem logical</li> </ul>
<p>1.8</p> <p>Emotional Intelligence</p>	<p>1.8.1</p> <p>Define Emotional Intelligence.</p>	<p>Emotional Intelligence is:</p> <ul style="list-style-type: none"> <li>• The ability to recognize and know what emotions you are feeling</li> <li>• Managing one's emotions so that they do not overwhelm a situation and one's thinking capability</li> <li>• Being able to recognize the emotions that others are feeling</li> <li>• Helping to manage other's emotions in order to ensure that those emotions do not overwhelm situations and thinking capacities</li> <li>• The ability to create sincere and authentic relationships that produce value and productivity</li> </ul>

Topic	Competency	Range of Knowledge
	1.8.2 Explain why Emotional Intelligence is important to the role of a desktop support technician.	<p>Emotional Intelligence is important to the role of the desktop support technician because:</p> <ul style="list-style-type: none"> <li>• It is important to understand a customer's emotional need as well as their business need</li> <li>• It makes one more aware of their own reactions and how it impacts the quality of the relationship between them and customers, peers, and management</li> <li>• It is important to understand how people work</li> </ul>
	1.8.3 Explain the three major components of Emotional Intelligence.	<p>The three major components of Emotional Intelligence are:</p> <ol style="list-style-type: none"> <li>1. Self-awareness</li> <li>2. Emotional Managements of Self and Others</li> <li>3. Emotional Connection</li> </ol>
	1.8.4 Describe an emotional hijack.	<p>An emotional hijack happens when:</p> <ul style="list-style-type: none"> <li>• There is a perceived threat, whether it is real or not, from a situation or person</li> <li>• There is a change in the chemistry of the brain that does not allow one to think rationally and clearly, which can last for up to 18 minutes</li> <li>• The body and brain are flooded with adrenaline and cortisol which can cause one to be over sensitive and/or tired very quickly</li> </ul>

Topic	Competency	Range of Knowledge
	1.8.5 Explain the impact of an emotional hijack on self and customers.	The impact of an emotional hijack can leave a person: <ul style="list-style-type: none"> <li>Saying things that may be hurtful without thinking about the consequences</li> <li>Not able to respond to a situation verbally or physically</li> </ul>
	1.8.6 Describe how to manage a customer's emotional hijack while on the phone.	In order to manage a customer's hijack while on the phone: <ul style="list-style-type: none"> <li>Make sure the customer knows you are on their side to help</li> <li>Listen attentively to the underlying emotion in the conversation</li> <li>Align yourself with the customer by identifying and stating their felt emotion with sincerity</li> <li>Create an environment of help by using words like "we" and "us" which will create a calming effect with the customer</li> </ul>
	1.8.7 Describe how to manage a customer's hijack face to face.	Manage a customer's hijack face to face by: <ul style="list-style-type: none"> <li>Being aware of the body language of the customer and if it is appropriate to come back at a later time</li> <li>Ensuring the customer that you are there to help them resolve their incident</li> <li>Leaving the office door open</li> <li>Understanding that the customer is frustrated, feeling pressure to complete their task, and may take that frustration out on you. Therefore, be pleasant and understanding.</li> </ul>

Topic	Competency	Range of Knowledge
<b>2.0 Strategy and Policy</b>		
2.1 Promote the Support Center	2.1.1 Identify ways to promote the image of the support center.	<p>Promote the image of the support center by:</p> <ul style="list-style-type: none"> <li>• Delivering a consistent, quality greeting and closing</li> <li>• Avoid making negative remarks about the support center</li> <li>• Keeping customers advised of the steps being taken to resolve their incident or service request</li> <li>• Providing customers with accurate information</li> <li>• Delivering consistent, professional results</li> <li>• Being aware of how personal conduct outside of the work environment could affect the organization's image</li> <li>• Exhibiting professionalism and confidence</li> <li>• Taking ownership, even when you do not have a ready answer</li> </ul>
	2.1.2 Define a mission statement.	<p>A mission statement is a formal short written statement of the purpose of a company or organization. The mission statement should guide the actions of the organization, spell out its overall goal, provide a sense of direction, and guide decision-making.</p>

Topic	Competency	Range of Knowledge
	2.1.3 Identify the purpose of a mission statement.	<p>A mission statement:</p> <ul style="list-style-type: none"> <li>• Defines the organization's purpose and reason for being (i.e., what you are doing and why you are doing it)</li> <li>• Identifies the main purpose and role of the organization, focusing everyone on a common goal</li> <li>• Inspires commitment</li> </ul>
	2.1.4 Explain the mission of desktop support.	<p>The mission of desktop support is to provide technical support and services to resolve escalated incidents and fulfill service requests to enable the productivity of end users.</p>
	2.1.5 Identify objectives of promoting desktop support.	<p>Promote the desktop support function in order to:</p> <ul style="list-style-type: none"> <li>• Educate customers on the value of the desktop support services</li> <li>• Communicate priorities, (i.e. mission and what IT services are available)</li> <li>• Make customers aware of the desktop team's contributions and value in meeting the business goals</li> <li>• Set customer expectations</li> <li>• Increase the visibility of the desktop support to stakeholders</li> <li>• Improve customer/user satisfaction</li> <li>• Increase customer loyalty</li> <li>• Improve morale as desktop support professionals feel more valued</li> </ul>

Topic	Competency	Range of Knowledge
2.2 Organizational Policy	2.2.1 Define policy.	Policies define what is or is not permitted within an organization. A policy establishes expectations and limitations related to behavior.
	2.2.2 List the importance of adhering to organizational policies.	Adhering to organizational policies is important because it: <ul style="list-style-type: none"> <li>• Encourages consistent behavior throughout the support center</li> <li>• Provides a framework for the delivery of consistent service</li> <li>• Protects the organization from legal action</li> <li>• Helps protect the organization and customers' proprietary information and other assets</li> </ul>
	2.2.3 List the purpose of organizational policies.	Organizational policies: <ul style="list-style-type: none"> <li>• Provide clear definitions of boundaries within which to work</li> <li>• Define what is acceptable and unacceptable employee behavior</li> <li>• Provide guidelines for dealing with inappropriate behavior</li> <li>• Set customer expectations</li> </ul>

Topic	Competency	Range of Knowledge
2.3 Support Center Services	2.3.1 List the responsibilities of the support center in meeting the needs of its customers.	<p>The support center is responsible for:</p> <ul style="list-style-type: none"> <li>• Being cost-effective by responding to customer incidents and service requests in a timely and efficient manner</li> <li>• Providing support center employees with training so they can deliver knowledgeable support while satisfying customer expectations</li> <li>• Ensuring support professionals know and understand the conditions of any relevant service level agreements (SLAs)</li> <li>• Delivering consistent, quality support while following the guidelines of the organization and the SLA</li> <li>• Ensuring the customer is supported in a respectful, courteous, and positive manner</li> </ul>



Topic	Competency	Range of Knowledge
	<p>2.3.2</p> <p>Identify major phases in the evolution of support center services.</p>	<p>Phases in the evolution of support center services include:</p> <ul style="list-style-type: none"> <li>• Support centers of the past: <ul style="list-style-type: none"> <li>- Entry-level, low-skill staff</li> <li>- Reactive</li> <li>- Paper-based systems</li> <li>- Phone-based systems: voice and fax</li> </ul> </li> <li>• Support centers of today: <ul style="list-style-type: none"> <li>- Proactive</li> <li>- Automated incident logging and tracking systems</li> <li>- E-mail</li> <li>- Internet and Web-based systems</li> <li>- Instant messaging (IM) and chat</li> <li>- Customer relationship management (CRM)</li> </ul> </li> <li>• Support centers of tomorrow: <ul style="list-style-type: none"> <li>- Expanded scope of services</li> <li>- Customer- and business-centric</li> <li>- Universal queue and universal agent</li> <li>- Self-service</li> </ul> </li> </ul>

Topic	Competency	Range of Knowledge
	<p>2.3.3</p> <p>List the phases in the evolution of desktop support services.</p>	<p>Past:</p> <ul style="list-style-type: none"> <li>• Paper-based systems</li> <li>• Desktop support accept calls from the help desk and users</li> <li>• Little technology at the user location (e.g. terminals)</li> <li>• Reactive environment</li> </ul> <p>Present:</p> <ul style="list-style-type: none"> <li>• Service management systems replaced the paper-based systems</li> <li>• SPOC taking ownership of incidents, escalating incidents to desktop support</li> <li>• Expanded breadth of technology supported</li> <li>• Higher percentage of incidents related to software issues</li> <li>• Improved hardware</li> <li>• Shift from reactive to proactive</li> <li>• More tasks are tied to release management, request management, and project management</li> <li>• Lack of industry standards for desktop support</li> </ul> <p>Future:</p> <ul style="list-style-type: none"> <li>• Fully integrated with support center</li> <li>• Continued growth in devices supported</li> <li>• Shift to be more customer and business-centric</li> <li>• Self-healing technologies will reduce software incidents</li> <li>• Industry standards improve efficiencies and effectiveness</li> </ul>

Topic	Competency	Range of Knowledge
	2.3.4 Describe representative metrics that illustrates how well desktop support services contribute to achieving business goals and objectives.	Representative metrics that can illustrate how well desktop supports the business goals and objectives include: <ul style="list-style-type: none"> <li>• Customer Satisfaction</li> <li>• Service Level Achievements</li> <li>• Contribution to achievement of enterprise/customer goals/objectives</li> </ul>

Topic	Competency	Range of Knowledge
<b>3.0 People Management</b>		
3.1 Teamwork	3.1.1 Identify the characteristics of a team.	<p>The characteristics of a team are to:</p> <ul style="list-style-type: none"> <li>• Work together to complete a task</li> <li>• Assist one another</li> <li>• Share ideas</li> <li>• Listen actively to each other</li> <li>• Support one another</li> <li>• Respect the abilities of all team members</li> <li>• Behave courteously towards all team members</li> <li>• Participate and contribute equally</li> </ul>
	3.1.2 List characteristics of a supportive workplace.	<p>A friendly, supportive workplace is characterized by:</p> <ul style="list-style-type: none"> <li>• Rapport among team members</li> <li>• Leadership and empowerment from management</li> <li>• A willingness among team members to collaborate and assist other team members</li> <li>• Responsible and trustworthy team members</li> <li>• Honest, trusted two-way communication between management and employees</li> <li>• Clear job descriptions that map to actual duties and responsibilities</li> <li>• Individual and team reward and recognition programs</li> <li>• Fair and consistent policies concerning the performance of duties</li> </ul>

Topic	Competency	Range of Knowledge
	3.1.3 Define responsibilities of members in a team environment.	Each member of the team is responsible for: <ul style="list-style-type: none"> <li>• Sharing ideas and knowledge in team discussions and activities</li> <li>• Respecting other team members</li> <li>• Being receptive to the ideas of other team members</li> <li>• Being punctual—arriving promptly for meetings and for work</li> <li>• Taking personal accountability for one's actions and fulfilling one's responsibilities</li> </ul>
	3.1.4 List the benefits of teamwork.	The benefits of teamwork include: <ul style="list-style-type: none"> <li>• Synergy—the results of combined efforts will be greater than the equal amount of individual effort</li> <li>• Increased motivation and job satisfaction</li> <li>• A team that is flexible and adaptive to change, thus providing high-quality service</li> <li>• A team with collective knowledge, collaboration, and resourcefulness</li> <li>• Team members that are more committed because they have a sense of ownership in decisions</li> <li>• Enhanced communication</li> </ul>

Topic	Competency	Range of Knowledge
	3.1.5 Identify characteristics of successful teams.	Successful teams: <ul style="list-style-type: none"> <li>• Have clear goals, objectives, and expectations</li> <li>• Achieve goals in a coordinated, effective manner</li> <li>• Encourage trust among team members</li> <li>• Are willing to help and defend each other</li> <li>• Receive leadership and support from management</li> <li>• Share knowledge among team members</li> <li>• Communicate effectively within and outside of the team</li> <li>• Create, update, and follow processes to ensure quality</li> <li>• Encourage participation in decision making</li> <li>• Provide for the recognition of individual and team performance</li> <li>• Are well regarded within the organization</li> </ul>

Topic	Competency	Range of Knowledge
3.2 Building Rapport	3.2.1 List techniques for establishing effective relationships with other departments.	<p>To establish effective relationships with other departments:</p> <ul style="list-style-type: none"> <li>• Be aware of how your team contributes to the success of other teams</li> <li>• Treat others as you would like to be treated</li> <li>• Treat others in your department as if they were your customers</li> <li>• Understand the responsibilities and roles of other departments</li> <li>• Inform other departments about the roles and responsibilities of your group</li> <li>• Focus on the steps necessary to resolve the incident or service request, not on blaming others</li> <li>• Adhere to the procedures outlined in the support center's operating level agreement</li> <li>• Look for opportunities to share information</li> <li>• Adopt a "we're all on the same team" attitude</li> <li>• Recognize others for their contributions</li> <li>• Optimize communication to suit your audience</li> </ul>
3.3 Stress Management	3.3.1 Define stress.	<p>Stress can be defined as:</p> <ul style="list-style-type: none"> <li>• A reaction to change</li> <li>• A natural reaction that can have a positive or negative impact</li> <li>• A feeling caused by being prevented from achieving a desired outcome</li> </ul>

Topic	Competency	Range of Knowledge
	3.3.2 Identify causes of stress.	<p>Stress can be caused by:</p> <ul style="list-style-type: none"> <li>• Too much work for available staff</li> <li>• Not enough time or ineffective use of one's time</li> <li>• Personal situations and conflicts</li> <li>• Lack of knowledge or training</li> <li>• Feeling out of control</li> <li>• Lacking confidence in management and colleagues</li> <li>• Physical obstacles, such as illness or disability</li> <li>• Environmental obstacles, such as temperature</li> <li>• Lack of self-confidence</li> </ul>
	3.3.3 List common physical symptoms of stress.	<p>Physical symptoms of stress can include:</p> <ul style="list-style-type: none"> <li>• Increased heart rate</li> <li>• Increased blood pressure</li> <li>• Perspiration</li> <li>• Muscle tension</li> <li>• Fatigue</li> <li>• Tightness in the neck and shoulders</li> <li>• Higher incidence of influenza, colds, and chills</li> <li>• Backache</li> <li>• Problems sleeping</li> <li>• Irritability and short-temperedness</li> <li>• Headache</li> <li>• Stomach ache</li> <li>• Difficulty concentrating</li> <li>• Dermatological problems</li> </ul>



Topic	Competency	Range of Knowledge
	<p>3.3.4</p> <p>List techniques for managing stress.</p>	<p>Techniques for managing stress include:</p> <ul style="list-style-type: none"> <li>• Prioritize goals and set realistic expectations</li> <li>• Take deep breaths</li> <li>• Take breaks and lunches</li> <li>• Talk about your concerns</li> <li>• Confront the issues that are causing stress</li> <li>• Exercise</li> <li>• Consider buying or adopting a pet</li> <li>• Manage your time more effectively—possibly with a time management tool</li> <li>• Broaden your interests with a hobby or social life outside of work</li> <li>• Give something back to the community (i.e., volunteer)</li> <li>• Adopt a more balanced diet</li> </ul>

Topic	Competency	Range of Knowledge
<b>4.0 Resources</b>		
4.1 Support Center Infrastructure	4.1.1 Identify common tools and technologies used in the support center.	<p>Common tools/technologies used in the support center include:</p> <ul style="list-style-type: none"> <li>• Telephony Tools <ul style="list-style-type: none"> <li>– Automated Call Distribution (ACD)</li> <li>– Automatic Voice Recognition (AVR)</li> <li>– Interactive Voice Response (IVR)</li> <li>– Voice -over Internet Protocol (VoIP)</li> <li>– Computer Telephony Integration (CTI)</li> </ul> </li> <li>• Collaboration Tools <ul style="list-style-type: none"> <li>– Knowledge Sharing Tools</li> <li>– Instant Messaging (IM)</li> <li>– Wikis</li> <li>– Screen Sharing</li> <li>– Digital Whiteboards</li> <li>– Social Media messaging (E.g., Facebook, Twitter, LinkedIn, Google+)</li> </ul> </li> <li>• Remote Support Tools <ul style="list-style-type: none"> <li>– Remote Control</li> <li>– Remote Collaboration</li> <li>– Remote Administration</li> </ul> </li> <li>• Monitoring and Alerting Tools <ul style="list-style-type: none"> <li>– Monitor boards (system/service status)</li> <li>– Paging systems</li> <li>– Real time messaging systems</li> </ul> </li> </ul>

Topic	Competency	Range of Knowledge
	4.1.1 Cont.	<ul style="list-style-type: none"> <li>• Self-service technologies</li> <li>• Automated Remediation technologies</li> <li>• Social Media technologies</li> <li>• Cloud Services technologies—public, private, hybrid models               <ul style="list-style-type: none"> <li>– Application-as-a-Service</li> <li>– Desktop-as-a-Service (DaaS)</li> <li>– Infrastructure as a Service (IaaS)</li> <li>– Platform as a Service (PaaS)</li> <li>– Software as a Service (SaaS)</li> <li>– Storage as a Service (STaaS) (E.g., Dropbox, Google Docs)</li> </ul> </li> <li>• Service Management Systems               <ul style="list-style-type: none"> <li>– Incident and Service Request Management</li> <li>– Problem Management</li> <li>– Change Management</li> <li>– Configuration Management</li> <li>– Asset Management</li> <li>– Event Management</li> </ul> </li> <li>• Knowledge Management Systems</li> <li>• Workforce Management Systems</li> <li>• Reporting Systems</li> <li>• Mobile Device Management</li> </ul>
4.2 Telephony Tools	4.2.1 Describe the purpose of telephony systems for support.	The purpose of telephony systems is to leverage telephony functionality and features by providing an effective interactive audio channel to resolve issues and increase customer satisfaction with support center services.

Topic	Competency	Range of Knowledge
	<p>4.2.2</p> <p>Describe common telephony features.</p>	<p>Common telephony features include:</p> <p><b><i>Hold</i></b>—This feature is used to place a customer on hold for a specific period of time, typically no more than 3 minutes. This time is tracked either as part of talk time or as a separate metric. During the hold, typically music or company messaging plays with promotions or information.</p> <p><b><i>Mute</i></b>—This feature is used to place a customer on hold for a short period of time. A customer can still be heard, an analyst cannot be heard.</p> <p><b><i>Transfer</i></b>—This feature is used to send a customer to another department, group, or individual to assist with an incident or request. A warm transfer is the best practice recommendation when conducting a transfer.</p> <p><b><i>Call Park</i></b>—This feature allows for a call to be placed on hold and then retrieved from any telephone set within the system.</p> <p><b><i>Conference Calling</i></b>—This feature allows for a three way call to be performed; and to provide a bridge for multiple callers to dial-in for training and meetings.</p> <p><b><i>ANI/Caller ID</i></b>—The ANI feature captures the caller's number and line information. Caller ID may be used to display a caller's telephone number ( in association with a database like a service management system, the caller's name).</p>

Topic	Competency	Range of Knowledge
	4.2.2 Cont.,	<p><b>Automated Attendant</b>—This feature is a voice menu system that allows callers to be transferred to an extension by using a dial by name directory without going through a telephone operator or receptionist. Unattended Service and Night Service are two features of an Automated Attendant.</p> <p><b>Live Monitoring</b>—This feature allows for calls to be monitored in real time.</p> <p>Side-by-side—sitting with an analyst during the call</p> <p>Silent Monitoring (unannounced)—monitoring a call live from another location</p> <p><b>Recorded Monitoring</b></p> <p>Voice and screen recording—reviewed at later time</p>
	4.2.3 Describe Automated Call Distributor (ACD) systems.	An ACD system is a system that distributes incoming contacts to support analysts. The main task of an ACD system is to route calls to the appropriate analysts based on established business rules. The system includes hardware, lines, switches, and software.
	4.2.4 Describe the purpose of an ACD System.	The purpose of an ACD is to distribute incoming calls/contacts (typically large volumes) to a specific group of individuals/agents based on a set of predefined routing strategy. ACD's are used where incoming calls/contacts need to speak/interact with someone, but not any specific individual.

Topic	Competency	Range of Knowledge
	4.2.5 Describe Interactive Voice Response (IVR) systems.	Interactive Voice Response (IVR) is a component of a telephony system that interacts with callers, collects data, and can provide solutions by routing contacts to the appropriate analyst. An (IVR) uses a combination of voice recognition, a feature called Automatic Voice Recognition (AVR) and touch-tone keypad selections as input.
	4.2.6 Describe the purpose of an IVR System.	The purpose of an IVR system is to collect, validate, and route customer information efficiently to support analysts.
	4.2.7 Identify the support functions that can be supported by an IVR System.	<p>The following support functions can be supported using IVR systems:</p> <ul style="list-style-type: none"> <li>• Password reset</li> <li>• Incident or request status checks</li> <li>• Customer surveys</li> <li>• User profile updates</li> <li>• Faxback services</li> <li>• FAQs</li> <li>• Payment processing</li> <li>• Access contact information (I.e., support center hours, contact methods, etc.)</li> </ul>

Topic	Competency	Range of Knowledge
	<p>4.2.8</p> <p>Describe common telephony metrics and their purpose.</p>	<p>Common telephony metrics and their purposes include:</p> <p><b><i>Average Speed to Answer (ASA):</i></b> The average amount of time that a caller is waiting in the queue before the call is answered.</p> <p><b><i>Hold Time:</i></b> The average time on hold (after the call has been answered); used to determine how long the analyst is connected to the caller.</p> <p><b><i>Abandon Before Answer (ABA):</i></b> The percentage of customers that end the call (I.e., hang up) before the call is answered.</p> <p><b><i>Average Handle Time (AHT):</i></b> Talk Time + After Call Work (ACW) + Hold time; used to develop staffing/scheduling model.</p> <p><b><i>Average Talk Time (ATT):</i></b> The percentage or amount of time an analyst spends handling/talking to a customer.</p> <p><b><i>Availability:</i></b> The percentage of total time the analyst has been available to take incoming or make outgoing calls; used to measure staff productivity and utilization.</p>
	<p>4.2.9</p> <p>Identify the benefits of call measurements in the support center.</p>	<p>The benefits of call measurements include:</p> <ul style="list-style-type: none"> <li>• Identifying required resources for staffing and scheduling</li> <li>• Determining the schedule plan</li> <li>• Measuring analyst performance</li> </ul>

Topic	Competency	Range of Knowledge
4.3 Computer Telephony Integration (CTI)	4.3.1 Describe Computer Telephony Integration (CTI).	Computer Telephony Integration (CTI) is technology that allows for the interactions between telephony systems and computer systems. For example, a customer can input a unique identifier such as an account number, employee id, or other personal identification number in to the IVR/AVR menu feature of a telephone system. This data is then sent to the service management system. The data is then validated and used by the system to route the call to the analyst via a simultaneous phone call (or chat) and “screen pop”. A screen than shows the appropriate customer information for analyst to validate before handling the issue.
	4.3.2 Describe the purpose of a CTI system.	The purpose of a CTI System is to handle users and customers more efficiently by providing immediate access to information which enables the analyst to customize a greeting and have current customer information on hand.



Topic	Competency	Range of Knowledge
	<p>4.3.3</p> <p>Identify examples of CTI functionality.</p>	<p>Examples of CTI functionality include:</p> <ul style="list-style-type: none"> <li>• Validates customer entitlement or authenticates customer information</li> <li>• Screen pop</li> <li>• Synchronous screen transfer for escalations</li> <li>• Automated dialing</li> <li>• Automated dispatch</li> <li>• Voice recording integration</li> <li>• Call/Ticket Monitoring</li> <li>• Password Reset</li> <li>• Routes calls, tickets, emails, and chats</li> <li>• Automated customer profiling</li> </ul>

Topic	Competency	Range of Knowledge
	<p>4.3.4</p> <p>Describe the benefits of CTI.</p>	<p>Benefits of CTI include:</p> <ul style="list-style-type: none"> <li>• Efficiency of customer contacts by reducing the Average Handle Time (AHT) by gathering repetitive data. The analyst does not have to gather and search for information which reduces the time spent on with the contact</li> <li>• Increases value by improving productivity—handling contacts in less time, validating data vs. collecting, reducing the time to resolve issues</li> <li>• Improves the customer experience due to the customer information being validated and routed to the appropriate analyst</li> <li>• Increases customer confidence and perception</li> <li>• Reduces cost by providing a quicker customer resolution</li> </ul>
	<p>4.3.5</p> <p>Identify challenges of CTI.</p>	<p>Challenges of CTI include:</p> <ul style="list-style-type: none"> <li>• Integration with other systems may be complex and costly</li> <li>• Integration can result in longer ASA times if not implemented properly</li> <li>• May require customers to enter information, such as their ID, in order to facilitate call routing</li> </ul>

Topic	Competency	Range of Knowledge
4.4 Support Delivery Methods	4.4.1 Identify methods used for delivering support.	<p>Methods used for delivering support include:</p> <ul style="list-style-type: none"> <li>Assisted service: <ul style="list-style-type: none"> <li>Telephone support</li> <li>Desktop support (on-site)</li> <li>Walk-up support</li> <li>Electronic support</li> <li>Remote control</li> <li>E-mail</li> <li>Instant messaging (IM)</li> <li>Chat</li> <li>Social media</li> </ul> </li> <li>Self-service: <ul style="list-style-type: none"> <li>Help applications</li> <li>Knowledge bases</li> <li>Online documentation, tutorials interactive videos</li> <li>Social media</li> </ul> </li> <li>Automated remediation (self-healing)</li> </ul>

Topic	Competency	Range of Knowledge
	<p>4.4.2</p> <p>Identify the factors used to determine which support delivery methods are most appropriate to use for support.</p>	<p>The factors contributing to the type of delivery method used for providing support depends on the:</p> <ul style="list-style-type: none"> <li>• Product or application being supported</li> <li>• Impact of the incident or service request</li> <li>• Complexity of the skill set needed to resolve the incident or service request compared to the expertise of your support staff</li> <li>• Stipulations in the Service Level Agreement (SLA)</li> <li>• Location of the customer</li> <li>• Time zones of the customer and the support analyst</li> <li>• The support center hours of operation</li> <li>• Availability and capability of remote tools</li> <li>• Effectiveness of knowledge management</li> </ul>

Topic	Competency	Range of Knowledge
4.5 Telephone Support	4.5.1 Describe the purpose of telephone support.	<p>The purpose of telephone support is to provide the initial contact (Level/Tier 1) support to enable the quickest, most familiar communication channel for service restoration of repetitive issues. Telephone support:</p> <ul style="list-style-type: none"> <li>• Requires no previous training to use</li> <li>• Is immediate, interactive, two-way communication</li> <li>• Is usually perceived as having highest value by customers</li> <li>• Normally provides quick access to support center personnel</li> <li>• Escalates to other support groups and may invoke other methods if the incident or request cannot be resolved over the phone</li> <li>• Utilizes remote control technologies to assist in service restoration</li> </ul>
	4.5.2 Describe the benefits of telephone support.	<p>The benefits of telephone support include:</p> <ul style="list-style-type: none"> <li>• Detecting the emotional state of the customer and developing customer relationships</li> <li>• Improved customer perception by providing direct access</li> <li>• Faster problem determination for complex issues</li> <li>• Conveys tone of voice as well as message for more complete communication</li> </ul>

Topic	Competency	Range of Knowledge
	<p>4.5.3</p> <p>Describe the challenges of telephone support.</p>	<p>The challenges of telephone support include:</p> <ul style="list-style-type: none"> <li>• Lack of visual (social) clues</li> <li>• More expensive than most other channels</li> <li>• Keeping customer focused on the single issue</li> <li>• Cannot see what customer sees, relied on customer description of what they see and did</li> <li>• Little education or training due to telling vs. showing</li> </ul>
<p>4.6</p> <p>Desktop Support</p>	<p>4.6.1</p> <p>Describe desktop support.</p>	<p>Desktop support involves a support professional going to a customer's physical location to respond to an incident or request. Desktop support should be used when the incident or request cannot be resolved remotely.</p>
	<p>4.6.2</p> <p>Describe the benefits of desktop support.</p>	<p>The benefits of desktop support include:</p> <ul style="list-style-type: none"> <li>• One-on-one, face-to-face communication with the customer, which establishes better rapport</li> <li>• Desktop support technicians can view the environment from the customer's perspective</li> <li>• Facilitates better understanding of user situation and environment</li> </ul>

Topic	Competency	Range of Knowledge
	<p>4.6.3</p> <p>Describe the challenges of desktop support.</p>	<p>Challenges of desktop support include:</p> <ul style="list-style-type: none"> <li>• Cost—it is the most expensive way to provide support</li> <li>• Proper documentation</li> <li>• Lack of accountability if incidents are not documented—in real time or in a timely manner</li> <li>• Utilization and productivity issues due to drive-by's</li> </ul>

Topic	Competency	Range of Knowledge
4.7 Electronic Support	4.7.1 Describe electronic support delivery methods.	<p>Electronic support delivery methods includes:</p> <p><b>Remote Support</b> — Remote support tools provide a support center the ability to remotely access, repair, and fix devices, workstations, and servers without the need of having a person physically present onsite. This reduces costs, decreases downtime, and decreases the support resources required to restore the service. In addition, remote support tools provide the support professional with the ability to troubleshoot and collaborate remotely with customers, thus facilitating service restoration. Types of remote support tools include: remote control, remote collaboration, and remote administration.</p> <p><b>E-mail</b>— Allows customers to submit incidents, service requests, and requests for change (RFCs) at a time most convenient for them. This method allows a support center professional to respond to customers who are not onsite.</p> <p><b>Instant Messaging (IM) and Chat</b>—Enables interactive communication between customers and the support staff. It also allows the support staff to quickly access in-house experts for assistance to eliminate/reduce further escalations.</p>



Topic	Competency	Range of Knowledge
4.8 Self-service	4.8.1 Describe the objective of self-service.	<p>The objective of self-service is to enable customers to resolve their issues (incidents and service requests) without the direct involvement of the support center (or anyone else). Self-service:</p> <ul style="list-style-type: none"> <li>• Provides easy access to documentation (E.g., policies, procedures, SLAs, FAQs, etc.) to help customers resolve their incidents and service requests</li> <li>• Provides customers with the ability to search for solutions to commonly known errors and questions</li> <li>• Provides training and online technical tutorials</li> <li>• Allows customers to update contact information and reset passwords</li> <li>• Allows customers to submit incidents and requests</li> <li>• Allows customers to check on the status of their incident</li> </ul>

Topic	Competency	Range of Knowledge
	<p>4.8.2</p> <p>Describe the benefits of self-service technology.</p>	<p>The benefits of self-service technology include:</p> <ul style="list-style-type: none"> <li>• Restoration of service without assistance enables users to be independent and self-sufficient</li> <li>• Provides an additional support channel, available 24x7</li> <li>• Provides consistent responses to repetitive requests enabling more self-sufficiency</li> <li>• Provides a preferred support method for some customer segments</li> <li>• Lowers the cost of support for the support center</li> <li>• Reduces downtime for users</li> </ul>
	<p>4.8.3</p> <p>List examples of common self-service technology.</p>	<p>Common examples of self-service technology include:</p> <ul style="list-style-type: none"> <li>• Web-based systems</li> <li>• Faxback systems</li> <li>• IVR/AVR-based systems</li> <li>• Online training/tutorials</li> <li>• Online help systems for applications</li> <li>• Customer forum groups</li> <li>• Support blogs</li> <li>• Social media</li> <li>• Learning Management Systems (LMS's) that include online video and computer training</li> </ul>

Topic	Competency	Range of Knowledge
4.9 Automated Remediation (self-healing technology)	4.9.1 Describe the objectives of automated remediation (self-healing technology).	<p>Automated remediation technology:</p> <ul style="list-style-type: none"> <li>• Is intended to provide instantaneous (24/7/365) response to issues minimizing the impact of any service failures</li> <li>• Identifies when an issue has occurred and initiates remedial or corrective action to restore a user/system to a functioning state (without human intervention)</li> <li>• Should link/correlate to incident, request, problem, and change management</li> </ul>
	4.9.2 Identify examples of automated remediation functionality.	<p>Examples of automated remediation functionality include:</p> <ul style="list-style-type: none"> <li>• Scan and monitor for viruses</li> <li>• Restore services (systems/infrastructure) after a virus has been detected</li> <li>• Automatically check/install updates/patches</li> <li>• Diagnose and resolve common incidents (I.e., network connectivity, printer access)</li> <li>• Perform file clean-up</li> <li>• Repair application issues</li> </ul>

Topic	Competency	Range of Knowledge
	<p>4.9.3</p> <p>Describe the benefits of automated remediation tools.</p>	<p>The benefits of automated remediation tools include:</p> <ul style="list-style-type: none"> <li>• Increased availability of services for users</li> <li>• Reduction in downtime for business</li> <li>• Reduction in calls/escalations to technical management</li> <li>• Improved categorization for incident, problem, and change management (corrective actions)</li> <li>• Increased customer satisfaction due to reduced incidents and disruption to the business</li> </ul>
	<p>4.9.4</p> <p>Describe the challenges of automated remediation tools.</p>	<p>Challenges of automated remediation tools include:</p> <ul style="list-style-type: none"> <li>• Integration with systems/infrastructure can be challenging and costly</li> <li>• Tracking incidents and problems corrected by self-healing can be inconsistent</li> </ul>
<p>4.10.1</p> <p>Social Media</p>	<p>4.10.1</p> <p>Describe the purpose of social media.</p>	<p>Social media provides highly-interactive platforms to facilitate the interactions (create, share, exchange of information) of people via virtual (online collaboration, social networking, forums, micro blogging) communities to help each other.</p>

Topic	Competency	Range of Knowledge
	<p>4.10.2</p> <p>Describe how social media technology is used in the support center.</p>	<p>Ways in which social media technology is used the support center include:</p> <ul style="list-style-type: none"> <li>• Customers and employees can create, search, and update posts facilitating knowledge sharing between each other</li> <li>• Community members share knowledge with each other via various platforms</li> <li>• Personalized communication via customer preferred channels</li> <li>• Easily customized push/pull channels for communication</li> <li>• Customers share experiences with each other and the service provider</li> <li>• Data mining for product/service improvement</li> </ul>
	<p>4.10.3</p> <p>Describe the benefits of using social media technologies in a support organization.</p>	<p>The benefits of using social media technologies in a support organization include:</p> <ul style="list-style-type: none"> <li>• Engages customers through their preferred communication channels</li> <li>• Community members assist each other with real-life experiences</li> <li>• Facilitates collaboration to create and share information and knowledge</li> <li>• Allows individuals and communities to support each other</li> <li>• Increases efficiency of the business due to collaboration, allowing simple issues to be resolved quicker</li> </ul>

Topic	Competency	Range of Knowledge
	4.10.4 Describe the challenges of using social media technology in a support organization.	Challenges of using social media technology in a support organization include: <ul style="list-style-type: none"> <li>• Social media platforms can be siloed; therefore, information is not easily shared between social media platforms</li> <li>• Unfamiliarly of support personnel with social media tools</li> <li>• Culture change for customers and support which can result in lower utilization and lower learning curves</li> </ul>
4.11 Cloud Services	4.11.1 Describe cloud services.	A set of services offered via a network and a distributed computing environment where the services are provided via a real infrastructure (I.e., hardware, software, storage); however, these services appear to be virtual. Cloud is a synonym for distributed computing over a network of virtual servers and services.
	4.11.2 Describe the objective of cloud services.	The primary objective of cloud services is to offer scalable, on-demand virtual services that can be moved and scaled up/down without affecting the users or business.
	4.11.3 List different types of cloud services that might be supported.	Examples of types of cloud services that might be supported include: <ul style="list-style-type: none"> <li>• Software-as-a-Service (SaaS)</li> <li>• Infrastructure-as-a-Service (IaaS)</li> <li>• Platform-as-a-Service (PaaS)</li> <li>• Storage-as-a-Service (SaaS)</li> <li>• Applications-as-a-Service (AaaS)</li> <li>• Desktop-as-a-Service (DaaS)</li> </ul>

Topic	Competency	Range of Knowledge
	4.11.4 Describe the benefits of cloud services.	Benefits of cloud services include: <ul style="list-style-type: none"> <li>• Easily scalable and more flexible to meet the needs of the business</li> <li>• Facilitates faster deployment of new services</li> <li>• Reduced spending on infrastructure costs</li> <li>• Device and location independence</li> <li>• Improved resource utilization</li> <li>• Enhanced capacity management capabilities improving financial stewardship of IT resources</li> </ul>
4.12 Workforce Management Systems	4.12.1 Describe the objective of workforce management systems.	<p>Workforce management systems are designed to properly allocate the supply of human resources to meet the demands of the business.</p> <p>Workforce management systems are designed to properly calculate and forecast contact volumes to optimize the scheduling of resources, which enables the business to meet goals and manage costs.</p>

Topic	Competency	Range of Knowledge
	4.12.2 Describe the benefits of workforce management for a support organization.	The benefits of workforce management for a support organization include: <ul style="list-style-type: none"> <li>• Effective utilization of support center staff</li> <li>• Accurate staffing and scheduling plans, ensuring a better understanding of costs</li> <li>• Improved understanding and management of shrinkage (costs)</li> <li>• Resource scheduling based on historical and anticipated contact volumes</li> <li>• Adjusted staffing levels to respond to peak demands</li> </ul>
4.13 Monitoring and Alert Systems	4.13.1 Describe monitoring and alerting systems.	A monitoring and alert system is software used to check a network system's logs and/or performance. If pre-programmed criteria are met, the alert system sends out notifications to the administrator and others.
	4.13.2 Identify common tools used to communicate with alerting systems.	Common tools that are used to communicate alerting systems include: <ul style="list-style-type: none"> <li>• E-mail</li> <li>• Web site alerts</li> <li>• Phone</li> <li>• Paging</li> <li>• Broadcast messaging</li> </ul>



Topic	Competency	Range of Knowledge
4.14 Reporting Systems	4.14.1 Describe the purpose of reporting systems.	The purpose of reporting systems are to: <ul style="list-style-type: none"> <li>• Allow management to make better decisions, quicker, and at lower risk which enables the support organization to contribute to the achievement of organizational goals and objectives</li> <li>• Allow management to better understand trends in performance and identify any changes in performance</li> </ul>
	4.14.2 Describe the benefits of reporting systems for support organizations.	The benefits of reporting systems for support organizations include: <ul style="list-style-type: none"> <li>• Report support center trends to management, customers, and support center staff</li> <li>• Understand relative performance of individuals and teams</li> <li>• Understand effectiveness of processes</li> <li>• Understand efficiency of processes</li> <li>• Improves the understanding of the value of support to management, customers, and support center staff</li> </ul>
	4.14.3 List types of reporting systems.	Types of reporting systems include: <ul style="list-style-type: none"> <li>• Scorecards <ul style="list-style-type: none"> <li>– Simple scorecard</li> <li>– Balanced scorecard</li> </ul> </li> <li>• Dashboards</li> <li>• Operations Report</li> <li>• Service Level Management—performance to Service Level Targets (SLT)</li> </ul>

Topic	Competency	Range of Knowledge
4.15 Mobile Device Management	4.15.1 Describe the objective of Mobile Device Management (MDM).	Mobile Device Management (MDM): <ul style="list-style-type: none"> <li>Ensures the security of both company owned and employee owned devices while managing cost and reducing service downtime</li> <li>Enables the functionality of deploying, assigning profiles, updating, and configuring mobile devices</li> </ul>
	4.15.2 List mobile device management functions.	Mobile device management functions include: <ul style="list-style-type: none"> <li>Policy management</li> <li>Software distribution</li> <li>Inventory management</li> <li>Security management</li> <li>Service management</li> </ul>
	4.15.3 Describe the benefits of mobile device management.	The benefits of mobile device management include: <ul style="list-style-type: none"> <li>Minimizes the costs of deployment and maintenance of devices</li> <li>Reduces support costs for mobile devices</li> <li>Increases availability of mobile devices</li> <li>Increases employee productivity</li> </ul>

Topic	Competency	Range of Knowledge
	<p>4.15.4</p> <p>Describe the challenges of mobile device management.</p>	<p>The challenges of mobile device management include:</p> <ul style="list-style-type: none"> <li>• Clear mobile device policy, strategy, and standards must be established</li> <li>• Increased security risks with mobile devices</li> <li>• Implementing an effective bring-your-own-device (BYOD) strategy</li> <li>• Multitude and diversity of mobile platforms increases support demand</li> <li>• Increase in costs if not managed properly</li> </ul>

Topic	Competency	Range of Knowledge
<b>5.0 Process and Procedure</b>		
5.1 Procedure	5.1.1 Define procedure.	A procedure is a documented set of steps required to produce a desired result.
5.2 Quality Assurance	5.2.1 Define quality assurance (QA).	Quality assurance (QA) is a systematic way of ensuring that all the activities necessary to design, develop, and implement services that satisfy the requirements of the organization and of customers take place as planned.
	5.2.2 Describe the purpose of quality assurance programs typically used in a support center.	<p>The purpose of quality assurance programs are to:</p> <ul style="list-style-type: none"> <li>• Ensure that the quality of service delivered meets the business requirement as identified in the SLA</li> <li>• Improve the level and quality of services to assure minimal impact from disruptions to the business</li> <li>• Recognize and reward teams and individuals</li> <li>• Develop coaching plans for all individuals and teams in the support center</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.2.3</p> <p>Describe the types of quality assurance programs typically used in a support center.</p>	<p>Types of quality assurance practices in a support center include:</p> <ul style="list-style-type: none"> <li>• Quality Monitoring <ul style="list-style-type: none"> <li>- Incident/Request (ticket/case) monitoring</li> <li>- Desktop support monitoring</li> <li>- Knowledge monitoring</li> <li>- E-mail/Chat monitoring</li> </ul> </li> <li>• Customer Satisfaction</li> <li>• Employee Satisfaction</li> <li>• Maturity Assessments</li> <li>• Service Improvement Plans (SIP)</li> </ul>
	<p>5.2.4</p> <p>Explain the value of monitoring programs.</p>	<p>Quality monitoring is an important activity in desktop support because it is the only way to understand the entire customer interaction.</p> <p>Quality monitoring:</p> <ul style="list-style-type: none"> <li>• Identifies areas of improvement within desktop support processes</li> <li>• Identifies areas of improvement for individuals</li> <li>• Provides an understand regarding the quality of service delivered</li> </ul>
	<p>5.2.5</p> <p>Identify mechanisms for desktop support monitoring.</p>	<p>Mechanisms for desktop support monitoring include:</p> <ul style="list-style-type: none"> <li>• Live service observations (reviewer visits the user site with the desktop support technician)</li> <li>• Follow-up calls or conduct customer satisfaction surveys</li> </ul>

Topic	Competency	Range of Knowledge
	5.2.6 List the benefits of desktop support monitoring.	<p>The benefits of desktop support monitoring include:</p> <ul style="list-style-type: none"> <li>• Ensures that procedures for desktop support visits are being followed</li> <li>• Provides feedback to desktop support staff on job performance</li> <li>• Identifies strengths and weaknesses of individuals and the organization</li> <li>• Provides coaching opportunities</li> <li>• Verifies consistency in following procedures</li> <li>• Identifies areas where procedures are not meeting expectations or are not being followed</li> <li>• Identifies opportunities for improvement</li> <li>• Improves the quality of service</li> <li>• Identifies training opportunities</li> </ul>
5.3 Customer Satisfaction Surveys	5.3.1 Explain the purpose of customer satisfaction surveys.	<p>Customer satisfaction surveys allow the desktop support to:</p> <ul style="list-style-type: none"> <li>• Determine the customers' perception of desktop support's products and services</li> <li>• Determine whether desktop support's products and services are meeting customers' expectations</li> <li>• Identify what the customers feel is important</li> <li>• Identify areas for improvement</li> <li>• Benchmark and trend customer satisfaction</li> <li>• Assist in developing new products and services based on customers' needs</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.3.2</p> <p>Describe the three most common types of surveys and the importance of each type.</p>	<p>Ongoing incident surveys are:</p> <ul style="list-style-type: none"> <li>• Completed as soon as possible after a call is closed</li> <li>• Typically short (e.g., 3–6 questions) and can be completed quickly</li> <li>• Used to measure the quality of a specific incident resolution</li> <li>• Used to monitor customer satisfaction between annual surveys and measure the impact of changes to processes, products, or services</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.3.2 (<i>cont'd</i>)</p> <p>Describe the three most common types of surveys and the importance of each type.</p>	<p>Annual or periodic surveys are:</p> <ul style="list-style-type: none"> <li>Planned and scheduled on a periodic basis (e.g., annually)</li> <li>Used to evaluate overall satisfaction levels with the support center's products, service offerings, and staff</li> <li>Use to identify changes to products, services, and processes that customers feel would improve their relationship with the support center and better meet their needs</li> <li>Based on the customer's perception of the company over the last year or period</li> <li>Typically skewed to emphasize recent experiences</li> </ul> <p>One-time surveys are:</p> <ul style="list-style-type: none"> <li>Not completed at regularly scheduled intervals</li> <li>Conducted for a specific purpose</li> <li>Appropriate for evaluating satisfaction levels with current products and service offerings or for identifying changes that customers feel are important</li> </ul>



Topic	Competency	Range of Knowledge
	5.3.3 Identify methods for distributing customer satisfaction surveys.	Methods for distributing and completing customer satisfaction surveys include: <ul style="list-style-type: none"> <li>• E-mail</li> <li>• Phone interviews</li> <li>• Internet, Web-based surveys</li> <li>• In-person interviews</li> <li>• Regular mail</li> <li>• Satisfaction follow-up cards left by DSTs</li> <li>• CTI and ACD systems</li> </ul>
5.4 Support Center Best Practices and Frameworks	5.4.1 Define Information Technology Service Management (ITSM).	Information Technology Service Management (ITSM) is a set of specialized organizational capabilities for providing value to customers in the form of services.
	5.4.2 Explain the objective of Information Technology Service Management (ITSM).	The objective of Information Technology Service Management (ITSM) is to deliver value to customers and the business in the form of services.
	5.4.3 Explain the value of ITSM best practices.	ITSM best practices provide value by: <ul style="list-style-type: none"> <li>• Ensuring that the services provided meets the business needs</li> <li>• Identifying areas for improvement</li> <li>• Ensuring consistent delivery of services</li> <li>• Improving individual and organizational performance, thus enhancing customer satisfaction</li> </ul>

Topic	Competency	Range of Knowledge
	5.4.4 List sources of IT best practices and support center framework models.	Sources of best practices and framework models include: <ul style="list-style-type: none"> <li>• HDI standards and best practices</li> <li>• KCS (Knowledge-Centered Support)</li> <li>• ITIL (Information Technology Infrastructure Library)</li> </ul>
	5.4.5 Describe the ITIL service lifecycle concept.	ITIL Information Technology Infrastructure Library (ITIL) is one framework to achieve ITSM. It is based on a service life-cycle approach and consists of five phases: <ul style="list-style-type: none"> <li>• <b>Service Strategy</b> – provides policy and guidance</li> <li>• <b>Service Design</b> – designs new and changed services to meet business needs</li> <li>• <b>Service Transition</b> – builds, tests, and prepares services for transition to live operation</li> <li>• <b>Service Operation</b> – delivers and supports services in operation</li> <li>• <b>Continual Service Improvement</b> – measures effectiveness and efficiency, and suggests opportunities to improve</li> </ul>
	5.4.6 Define service desk.	The service desk is a functional unit with specialized resources and capabilities. In many organizations, the service desk refers to the support center.

Topic	Competency	Range of Knowledge
	5.4.7 List the processes the support center and desktop support is typically responsible for.	The support center and desktop support is typically responsible for the following processes: <ul style="list-style-type: none"> <li>• Incident Management</li> <li>• Request Fulfillment</li> <li>• Access Management</li> <li>• Knowledge Management</li> </ul>
	5.4.8 List other processes the support center and desktop support may have some responsibilities for.	The support center and desktop support may have responsibilities in the following processes: <ul style="list-style-type: none"> <li>• Event Management</li> <li>• Problem Management</li> <li>• Change Management</li> <li>• Service Asset and Configuration Management</li> <li>• Release and Deployment Management</li> <li>• Service Level Management</li> <li>• Service Catalog Management</li> <li>• Availability Management</li> <li>• Capacity Management</li> <li>• IT Service Continuity Management</li> </ul>
	5.4.9 Explain the concept best practice.	Best Practice is a technique, method, or process which is regarded as more effective at delivering a particular outcome than any other technique, method, or process; based on repeatable procedures that have proven themselves over time for various organizations.

Topic	Competency	Range of Knowledge
	5.4.10 Explain the purpose of best practices in a service management environment.	The purpose of a best practice in the service management environment is to achieve better business results by utilizing proven industry practices.
	5.4.11 Explain the responsibilities of the desktop support technician with respect to ITSM best practices.	With respect to ITSM best practices, the desktop support technician needs to understand what ITSM best practices exist and which best practices apply to their organization.
5.5 Service Level Management	5.5.1 Explain the service level management (SLM) process.	<p>The Service Level Management (SLM) process is responsible for defining, documenting, agreeing, monitoring, measuring, reporting, and reviewing the levels of IT services provided. The purpose of the Service Level Management (SLM) process is to:</p> <ul style="list-style-type: none"> <li>• Ensure that specific and measurable targets are developed for all IT services</li> <li>• Monitor and improve customer satisfaction</li> <li>• Improve the relationship and level of communication with the business and customers</li> <li>• Identify and initiate improvement initiatives</li> </ul>

Topic	Competency	Range of Knowledge
	5.5.2 List the value of a SLM process.	<p>The value of a SLM process is to:</p> <ul style="list-style-type: none"> <li>• Improve communication via a collaborative business-centric focus</li> <li>• Manages customer expectations and assure that expectations are realistic and achievable</li> <li>• Ensure that the organization is capable of meeting the defined service levels</li> <li>• Identify areas for improvement</li> </ul>
	5.5.3 Describe the responsibilities of a desktop support technician in the SLM process.	<p>The responsibilities of a desktop support technician in the SLM process are to:</p> <ul style="list-style-type: none"> <li>• Work within the parameters of the service level agreement and operational level agreement for resolving incidents and fulfilling requests</li> <li>• Identify where services can better meet the business needs</li> </ul>
	5.5.4 Identify and explain the common service level management metrics that a desktop support technician should understand.	<p>Common Service Level Management metrics a desktop support technician should be able to identify and explain include:</p> <ul style="list-style-type: none"> <li>• Performance to Service Level Targets (SLT) as stated in the Service Level Agreement (SLA) <ul style="list-style-type: none"> <li>- Service targets achieved (E.g., response time, update frequency)</li> <li>- Service targets breached (E.g., response time, update frequency)</li> </ul> </li> <li>• Business impact of service targets breached</li> <li>• Customer satisfaction with services</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.5.5</p> <p>Explain the purpose of a service level agreement (SLA).</p>	<p>A service level agreement (SLA) is an agreement between the customer and the support center. It:</p> <ul style="list-style-type: none"> <li>• Ensures that the level of service provided meets the business needs</li> <li>• Sets and manages customer expectations for the level of services provided</li> <li>• Ensures that all the internal organizations and third parties (suppliers) that provide the services understand the level of service required by the business via Operating Level Agreements (OLA) and Underpinning Contracts (UC).</li> </ul> <p>SLAs are documents that should be reviewed on a regular basis and updated as necessary.</p>
	<p>5.5.6</p> <p>List the basic components of a service level agreement (SLA).</p>	<p>The basic components of a service level agreement (SLA) include:</p> <ul style="list-style-type: none"> <li>• Service description and scope</li> <li>• Stakeholder information</li> <li>• Contact information</li> <li>• Hours of service/applicability</li> <li>• Availability and capacity targets</li> <li>• Priority matrix</li> <li>• Response and restore targets</li> <li>• Identification of change windows</li> <li>• Metrics and review information</li> <li>• Escalation paths and procedures</li> <li>• Penalties and/or chargeback information</li> <li>• Costs of services</li> <li>• Signatures and review dates</li> </ul>

Topic	Competency	Range of Knowledge
	5.5.7 Define operational level agreement (OLA).	An operational level agreement (OLA) documents the agreements between the IT service provider and other parts of the organization which supports the delivery of services to the business. It defines roles, responsibilities, and expectations between internal groups to ensure alignment to the SLA.
	5.5.8 Identify considerations for setting priority levels.	<p>Priority levels are normally based on:</p> <ul style="list-style-type: none"> <li>• Impact <ul style="list-style-type: none"> <li>- The extent of deviation from the normal service level, in terms of: <ul style="list-style-type: none"> <li>» Number of users affected</li> <li>» Business processes impacted</li> </ul> </li> <li>- On the business or revenue</li> <li>- On stipulations in the SLA</li> </ul> </li> <li>• Urgency <ul style="list-style-type: none"> <li>- The acceptable delay to the user or business process in resolving the incident</li> </ul> </li> </ul>
	5.5.9 Explain the purpose of an underpinning contract (UC).	An underpinning contract defines the roles, responsibilities, and expectations between those third parties (suppliers) and the service provider to ensure alignment to the SLA.

Topic	Competency	Range of Knowledge
	5.5.10 Define service catalog.	<p>A service catalog is a repository that contains information about IT deliverables, prices, contact points, ordering and request processes. It is a database or a structured document with information about all live IT services.</p> <p>Customers use the service catalog to understand what IT services are available, the costs of service, and how to procure the services. The service catalog supports the “sale and delivery” of IT services.</p>
	5.5.11 Describe the basic components of a service catalog.	<p>The basic components of a service catalog include:</p> <ul style="list-style-type: none"> <li>• Description of catalog and scope</li> <li>• Vision and mission statements</li> <li>• Description of services</li> <li>• Value of services</li> <li>• Description of what business process the service supports/enables</li> <li>• How to order and receive the service</li> <li>• Contact information</li> <li>• Prices of service</li> </ul>
	5.5.12 Explain the value of a service catalog.	<p>A service catalog defines the scope of what is supported and not supported within the organization. The service catalog:</p> <ul style="list-style-type: none"> <li>• Supports the sale and delivery of services</li> <li>• Helps set expectations</li> <li>• Markets and promotes the value of the support organization to the business</li> </ul>



Topic	Competency	Range of Knowledge
5.6 Incident Management	5.6.1 Explain the purpose of the Incident Management process.	The primary purpose of the Incident Management process is to restore normal service operation as quickly as possible and thus minimize the impact on business operations, thus ensuring that the best possible levels of service quality and availability are maintained. 'Normal service operation' is defined as service operation within service level agreement (SLA) limits.
	5.6.2 Define incident.	An unplanned interruption to the standard operation of a service, or a reduction in the quality of that service. An Incident can also be the failure of an IT component that has not yet impacted a service—something is broken or not working as expected.

Topic	Competency	Range of Knowledge
	<p>5.6.3</p> <p>List and explain the activities of the Incident Management process.</p>	<p>Activities of the Incident Management process include:</p> <ul style="list-style-type: none"> <li>• <b>Incident Identification</b> – incident is reported</li> <li>• <b>Incident Logging</b> – incident is logged and time/date stamped</li> <li>• <b>Incident Categorization</b> – incident is classified by type</li> <li>• <b>Incident Prioritization</b> – priority is assigned based on impact and urgency</li> <li>• <b>Initial Diagnosis</b> – search for match or workaround to attempt quick resolution and service restoration</li> <li>• <b>Escalation</b> – a transfer and/or notification to another team, individual, or management</li> <li>• <b>Investigation and Diagnosis</b> – activities undertaken identify a solution and/or workaround</li> <li>• <b>Resolution and Recovery</b> – solution is applied and service is restored</li> <li>• <b>Closing</b> – support center verifies with the user that the incident is resolved and the incident is documented correctly</li> </ul>
	<p>5.6.4</p> <p>List the value of the Incident Management process.</p>	<p>Incident Management provides value by:</p> <ul style="list-style-type: none"> <li>• Minimizing impact to the business for any failures of the infrastructure</li> <li>• Minimizing downtime for users</li> <li>• Identifying training requirements for support staff and users</li> </ul>

Topic	Competency	Range of Knowledge
	5.6.5 Describe the responsibilities of a desktop support technician in the Incident Management process.	<p>In the Incident Management process, a desktop support technician is responsible for:</p> <ul style="list-style-type: none"> <li>• Accept and respond to escalated incidents as required in operational level agreement (OLA) in alignment with requirements of service level agreement (SLA)</li> <li>• Restore service within the guidelines of the SLA</li> <li>• Update incident records in a timely manner</li> <li>• Escalate incidents that require a higher level of technical knowledge to the appropriate support partner</li> </ul>

Topic	Competency	Range of Knowledge
	5.6.6 Identify and explain of common Incident Management metrics that a desktop support technician should understand.	<p>Common Incident Management metrics a desktop support technician should be able to identify and explain include:</p> <ul style="list-style-type: none"> <li>• Service Level Agreement (SLA) performance regarding incident management or OLA performance <ul style="list-style-type: none"> <li>- Incidents resolved within service level targets (#, %)</li> <li>- Operational Level Agreement (OLA) achievements</li> <li>- Customer satisfaction with the desktop support incident management process</li> <li>- Response Time (acknowledge) tickets</li> </ul> </li> <li>• Individual performance measurements regarding incidents (#, %) <ul style="list-style-type: none"> <li>- Resolved (#, %)</li> <li>- Handled remotely vs. deskside visits (#, %)</li> <li>- Recorded on-site (add'l incidents identified) (#, %)</li> </ul> </li> </ul>
	5.6.6 Con't.	<ul style="list-style-type: none"> <li>• Incident backlog <ul style="list-style-type: none"> <li>- Number of open (backlog) incidents (#, %)</li> <li>- Age of backlog (hrs/days)</li> </ul> </li> <li>• Quality Monitoring <ul style="list-style-type: none"> <li>- Customer satisfaction with desktop support technician (themselves)</li> <li>- Customer satisfaction with desktop support</li> <li>- Ticket quality (for their tickets)</li> </ul> </li> </ul>

Topic	Competency	Range of Knowledge
5.7 Request Fulfillment	5.7.1 Explain the purpose of the Request Fulfillment process.	The Request Fulfillment process is designed to deal with service requests, e.g., handle the type of work that isn't an incident, (e.g., standard changes from users, Installations, Moves, Adds, Changes (IMAC), How to Questions that are handled by the support center).
	5.7.2 Define service request.	A service request is a request from a user for information, advice, a standard change or access to an IT service.
	5.7.3 List and explain the activities of the Request Fulfillment process.	Request Fulfillment is very similar to the Incident Management process, though Requests are conceptually planned/scheduled, whereas incidents are typically unplanned. The activities of Request Fulfillment are: <ul style="list-style-type: none"> <li>• Accepting assigned requests</li> <li>• Logging requests</li> <li>• Determining if any other approvals are necessary, if so, forward for approval</li> <li>• Following appropriate procedures for request (assumes each type of request is defined)</li> </ul>
	5.7.4 List the value of the Request Fulfillment process.	Request Fulfillment provides value by: <ul style="list-style-type: none"> <li>• Reducing downtime and cost for users via effective and efficient fulfillment of service requests</li> <li>• Prioritizing requests based on business goals/alignment</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.7.5</p> <p>Describe the responsibilities of a desktop support technician in the Request Fulfillment process.</p>	<p>In the Request Fulfillment process, a desktop support technician is responsible for:</p> <ul style="list-style-type: none"> <li>• Accept and respond to escalated service requests as required in operational level agreement (OLA in alignment with requirements of service level agreement (SLA)</li> <li>• Fulfill service request within the guidelines of the service level agreement</li> <li>• Update service request records in real time</li> <li>• Escalate service requests that require a higher level of technical knowledge to the appropriate support partner</li> </ul>
	<p>5.7.6</p> <p>Identify and explain the common Request Fulfillment metrics that a desktop support technician should understand.</p>	<p>Common Request Fulfillment metrics a desktop support technician should be able to identify and explain include:</p> <ul style="list-style-type: none"> <li>• Service Level Agreement (SLA) performance <ul style="list-style-type: none"> <li>- Desktop related service requests resolved within service level targets (#, %)</li> <li>- Operational Level Agreement (OLA) performance regarding desktop service requests (#, %)</li> </ul> </li> <li>• Individual performance measurements regarding requests (#, %) <ul style="list-style-type: none"> <li>- Resolved (#, %)</li> <li>- Handled remotely vs. deskside visits (#, %)</li> <li>- Recorded on-site (add'l requests identified) (#, %)</li> </ul> </li> </ul>

Topic	Competency	Range of Knowledge
	5.7.6 Con't.	<ul style="list-style-type: none"> <li>Request backlog <ul style="list-style-type: none"> <li>Open (backlog) requests (#, %)</li> <li>Age of open requests (backlog) (E.g., hrs/ days, % within goals)</li> </ul> </li> <li>Quality Monitoring <ul style="list-style-type: none"> <li>Ticket quality (for their tickets)</li> </ul> </li> <li>Quality Monitoring</li> <li>Customer satisfaction with the Request Fulfillment process</li> </ul>
5.8 Problem Management	5.8.1 Explain the purpose of the Problem Management process.	<p>A Problem Management process is responsible for managing the lifecycle of all problems. The purpose of the Problem Management process is to:</p> <ul style="list-style-type: none"> <li>Prevent problems and resulting service disruptions from occurring</li> <li>Improve service availability by eliminating recurring incidents</li> <li>Minimize the impact of incidents that cannot be prevented</li> <li>Ensure that the information about problems and workarounds is maintained</li> <li>Ensure that the problem resolution is implemented through the appropriate Change and Release processes</li> </ul>
	5.8.2 Define problem.	A problem is the underlying cause of one or more incidents whose root cause is usually not known.

Topic	Competency	Range of Knowledge
	5.8.3 Define known error.	A known error is a problem where the root cause is known and a temporary workaround has been identified. Known errors are stored in the knowledge base or Known Error Database (KEDB), and can be used to resolve incidents and restore service quickly should future incidents occur.
	5.8.4 Explain the value of a Problem Management process.	The value of a problem management process are: <ul style="list-style-type: none"> <li>• Provides information about workarounds and known errors to incident management, thus increasing support center productivity and improving resolution times</li> <li>• Reduces repetitive incidents and increases availability of IT services</li> </ul>
	5.8.5 Describe the responsibilities of a desktop support technician in the Problem Management process.	In the Problem Management process, a desktop support technician is responsible for ensuring there is correct documentation of incident records and problem records when they have a role in problem management. This includes: <ul style="list-style-type: none"> <li>• Alerting desktop support manager about repetitive issues</li> <li>• Providing workarounds / solutions to the support center</li> <li>• Providing proactive problem management by being involved in desktop configuration items (CIs) which have “known errors” before incidents occur</li> </ul>



Topic	Competency	Range of Knowledge
	5.8.6 Identify and explain the purpose of common Problem Management metrics that a desktop support technician should understand.	Common Problem Management metrics that a support center analyst should be able to identify and explain include: <ul style="list-style-type: none"> <li>Incidents recorded and linked to problems at desktop support (#, %)</li> <li>First Contact Resolutions (FCR) attributed to Knowledge Management / Known Error Database (#, %)</li> </ul>
	5.8.7 Define root cause analysis (RCA).	Root cause analysis is solving a problem in a structured and organized manner to identify the true and underlying cause(s).

Topic	Competency	Range of Knowledge
	<p>5.8.8</p> <p>Explain the steps used in root cause analysis.</p>	<p>The following describes the steps performed in a root cause analysis:</p> <ol style="list-style-type: none"> <li>1. Identify the problem and develop a problem identification statement.</li> <li>2. Collect the data.</li> <li>3. Analyze the problem. <ul style="list-style-type: none"> <li>- Brainstorm possible causes</li> <li>- Prioritize the possible causes based on speed, workability, and cost</li> <li>- Select the most probable cause</li> </ul> </li> <li>4. Develop a plan based on the probable cause. A plan of action should include: <ul style="list-style-type: none"> <li>- The likely cause of the problem</li> <li>- A primary plan</li> <li>- A backup plan</li> <li>- Know how to back out of implemented changes</li> </ul> </li> <li>5. Implement the plan. <ul style="list-style-type: none"> <li>- Make one change at a time</li> <li>- Minimize impact on customer</li> <li>- Keep all parties informed</li> </ul> </li> <li>6. Observe and evaluate the results of the plan to identify the root cause. <ul style="list-style-type: none"> <li>- Evaluate the outcome of the plan and the success of each step</li> <li>- Use your backup plan if the original plan did not work</li> </ul> </li> <li>7. Document the steps in the resolution. If applicable, submit the change request and update the knowledge base.</li> </ol>

Topic	Competency	Range of Knowledge
5.9 Change Management	5.9.1 Explain the purpose of a Change Management process.	The purpose of a Change Management process is to respond to business requests (changes) in a timely and cost-effective manner. Change Management needs to ensure that all changes are recorded, assessed, prioritized, planned, tested, implemented and documented in a controlled manner.
	5.9.2 Define a change.	A change is the addition, modification or elimination of an authorized, planned or supporting service (component) and its related documentation.
	5.9.3 List the value of a Change Management process.	The value of Change Management is: <ul style="list-style-type: none"> <li>• Understanding why changes have been authorized and how they impact the business and the service provider</li> <li>• Timely implementation of changes related to business deadlines</li> <li>• Fewer failed changes, thereby reducing the number and duration of service interruptions</li> </ul>

Topic	Competency	Range of Knowledge
	5.9.4 Describe the responsibilities a desktop support technician in the Change Management process.	<p>In the Change Management process, a desktop support technician is responsible for following the Change Management process for all changes. This includes:</p> <ul style="list-style-type: none"> <li>• Implementing standard, pre-approved changes as authorized by change management</li> <li>• Participating in the Change Advisory Board (CAB) meetings</li> <li>• Participating in the building and testing of planned changes</li> <li>• Participating in deployment of approved changes to desktop configuration items (CIs)</li> </ul>
5.10 Service Asset and Configuration Management	5.10.1 Explain the purpose of the Service Asset and Configuration Management process.	<p>The Service Asset and Configuration Management process is responsible for protecting and ensuring the integrity of the information about the assets and configurations within the organization. The primary objectives of Service Asset and Configuration Management are to:</p> <ul style="list-style-type: none"> <li>• Provide a logical model of the IT infrastructure</li> <li>• Control and maintain accurate information about service components</li> <li>• Provide valuable information for decision making to other ITSM process areas</li> </ul>

Topic	Competency	Range of Knowledge
	5.10.2 List the value of the Service Asset and Configuration Management process.	<p>The value of the Service Asset and Configuration Management process are:</p> <ul style="list-style-type: none"> <li>• Provides information and knowledge that allows the organization to make better, more informed decisions faster</li> <li>• Facilitates diagnosis, isolation, and troubleshooting which results in improved restoration time for incidents, requests, and problems thus reducing the business impact</li> </ul>
	5.10.3 Describe responsibilities of a desktop support technician in the Service Asset and Configuration Management process.	<p>The responsibilities of a desktop support technician in the Service Asset and Configuration Management process are to:</p> <ul style="list-style-type: none"> <li>• Use configuration management information as it is available to assist with troubleshooting and resolution</li> <li>• Assist in defining, logging, and tagging assets and configuration items</li> <li>• Assist in deployments, moves, adds, and changes</li> <li>• Update the configuration management database (CMDB)</li> <li>• Perform audits and report any variations or discrepancies as per the policy</li> </ul>
	5.10.4 Define configuration item (CI).	<p>A component that is part of an IT infrastructure. CIs may vary widely in complexity, size, and type, from an entire system (including all hardware, software and documentation) to a single software module or a minor hardware component.</p>

Topic	Competency	Range of Knowledge
	5.10.5 Define Configuration Management Database (CMDB).	A database which contains details about the attributes and the history of each configuration item (CI) and details of the important relationships between CIs.
	5.10.6 List the advantages of implementing an Asset Management program.	<p>The advantages of implementing an Asset Management program include:</p> <ul style="list-style-type: none"> <li>• Ability to calculate total cost of ownership (TCO)</li> <li>• Ability to correctly account for IT capital costs</li> <li>• Identify equipment and licenses available for reassignment</li> <li>• Identify illegally installed or unlicensed software</li> </ul>
	5.10.7 List the challenges of implementing an Asset Management program.	<p>The challenges of implementing an Asset Management program include:</p> <ul style="list-style-type: none"> <li>• It can be complex</li> <li>• Requires organization-wide compliance with supporting procedures and systems</li> <li>• Needs to be integrated with Service Support processes as well as Service Delivery processes (i.e., Configuration Management)</li> </ul>

Topic	Competency	Range of Knowledge
5.11 Release and Deployment Management	5.11.1 Explain the purpose of the Release and Deployment Management process.	<p>The Release and Deployment Management process is responsible for protecting the integrity of IT services and the IT infrastructure through careful assessment and execution of technical and non-technical aspects of a release. The primary objectives of Release and Deployment Management are to:</p> <ul style="list-style-type: none"> <li>• Ensure technical and non-technical aspects of a release are considered</li> <li>• Ensure there is minimal impact to the business from releases</li> </ul>
	5.11.2 Describe the role of a desktop support technician in the Release and Deployment Management process.	<p>The role of a desktop support technician in Release and Deployment Management process is to participate on teams for new releases and to understand their role as per the release management process. This includes:</p> <ul style="list-style-type: none"> <li>• Participating in the testing of new configuration items (CIs)</li> <li>• Maintaining a laboratory of standard configurations used in the infrastructure</li> <li>• Deploying approved releases</li> </ul>
5.12 Access Management	5.12.1 Explain the purpose of an Access Management process.	<p>The purpose of an Access Management process is to manage access requests in a manner that meets the business needs. Access Management procedures are based on the security and availability policies.</p>
	5.12.2 Explain the value of an Access Management process.	<p>An Access Management process increases confidentiality, integrity, and availability of information through policies defined by Security Management. It provides an effective mechanism for audit purposes</p>

Topic	Competency	Range of Knowledge
	5.12.3 Describe the responsibility of a desktop support technician in the Access Management process.	The responsibility of a desktop support technician in the Access Management process is to ensure that the process/procedures are followed.
	5.12.4 Identify and explain the common Access Management metrics that a desktop support technician should understand.	<p>Common Access Management metrics a desktop support technician should be able to identify and explain include:</p> <ul style="list-style-type: none"> <li>• Service Level Agreement (SLA) performance <ul style="list-style-type: none"> <li>- Desktop related access requests resolved within service level targets (#, %)</li> <li>- Operational Level Agreement (OLA) performance regarding desktop related access requests (#, %)</li> </ul> </li> <li>• Individual performance measurements regarding access requests (#, %) <ul style="list-style-type: none"> <li>- Resolved (#, %)</li> <li>- Handled remotely vs. deskside visits (#, %)</li> <li>- Recorded on-site (add'l requests identified) (#, %)</li> </ul> </li> <li>• Quality Monitoring <ul style="list-style-type: none"> <li>- Ticket quality (for their tickets)</li> </ul> </li> <li>• Customer satisfaction with Access Management process</li> </ul>



Topic	Competency	Range of Knowledge
5.13 Continual Service Improvement (CSI)	5.13.1 Explain the purpose of the Continual Service Improvement (CSI) process.	The purpose of the Continual Service Improvement (CSI) process is to ensure that the services, processes, and lifecycle phases of the service provider continue to meet the needs of the business.
	5.13.2 Explain the value of the CSI process.	The CSI process provides value with ongoing assessments of how well the services and processes meet the business needs and identifies adjustments to ensure that they continue to meet the business needs.
	5.13.3 Explain the responsibility of a desktop support technician in the CSI process.	In the CSI process, a desktop support technician is responsible for being accurate and providing real-time, accurate documentation of incidents, requests, and problems.
5.14 Security Management	5.14.1 Explain the purpose of the Security Management process.	Security Management processes: <ul style="list-style-type: none"> <li>• Protect information assets against threats</li> <li>• Assess and mitigate security risks</li> <li>• Ensure confidentiality, integrity, and availability of the information assets</li> </ul>
	5.14.2 Explain the value of having security policies.	Having security policies: <ul style="list-style-type: none"> <li>• Ensures compliance with legal requirements</li> <li>• Addresses security with 3rd parties (suppliers)</li> <li>• Provides employees awareness of their responsibilities regarding security</li> <li>• Ensures security is designed into services, processes, and procedures</li> </ul>

Topic	Competency	Range of Knowledge
	5.14.3 Describe the responsibility of a desktop support technician in the Security Management process.	The responsibility of a desktop support technician in the Security Management process is to follow security policies and procedures and to understand the procedure for reporting any security related incidents. This includes: <ul style="list-style-type: none"> <li>Identifying security risks</li> <li>Reporting security breaches</li> <li>Maintaining legal compliance of desktop support procedures</li> </ul>
	5.14.4 Identify types of security policies.	Types of security policies include: <ul style="list-style-type: none"> <li>Unique login name and password parameters</li> <li>Password reset requirements</li> <li>Reducing the visibility of credit card information</li> <li>Blocking access to personal information</li> <li>Identification badge requirements</li> </ul>
	5.14.5 List types of data that should be protected.	Types of data that should be protected include: <ul style="list-style-type: none"> <li>Customer names and IDs</li> <li>National ID numbers</li> <li>Individual or corporate financial information</li> <li>Personal information</li> <li>Credit card numbers</li> </ul>

Topic	Competency	Range of Knowledge
	5.14.6 Explain the importance of reporting security compromises.	Reporting security compromises: <ul style="list-style-type: none"> <li>• Protects the company and the customer</li> <li>• Identifies the offender and prevents the security breach from occurring again</li> <li>• Limits the damage that is caused</li> <li>• Alerts customers to possible security threats</li> <li>• Helps in the resolution of security incidents</li> <li>• Enables effective security policies and procedures</li> </ul>
	5.14.7 Explain the importance of confidentiality.	Confidentiality: <ul style="list-style-type: none"> <li>• Protects the customer and company from theft and/or abuse of information</li> <li>• Protects the customer from embarrassment</li> <li>• Ensures legal compliance</li> </ul>
	5.14.8 Explain the importance of legal compliance.	Legal compliance: <ul style="list-style-type: none"> <li>• Protects identity information</li> <li>• Protects the organization's assets</li> <li>• Protects the organization from legal liability</li> <li>• Includes notifying management about issues that may involve questionable legality, so that management is able to take appropriate steps to comply with the law and to protect the organization and its customers</li> </ul>
5.15 Knowledge Management	5.15.1 Explain the purpose of knowledge management in a support environment.	Knowledge Management is designed to improve the efficiency and effectiveness of other service management processes through the capture, structure, reuse, and improvement of knowledge articles.

Topic	Competency	Range of Knowledge
	5.15.2 Define Knowledge-Centered Support (KCS).	Knowledge-Centered Support (KCS) is: <ul style="list-style-type: none"> <li>• A principle-based methodology that seeks to capture, structure, reuse, and improve knowledge in the support delivery process</li> <li>• Knowledge management best practices based on process and not technology</li> </ul>
	5.15.3 Define knowledge article.	A knowledge article is a findable, reusable, and structured object that contains the customer's experience, the analyst findings, and the metadata about the article.
	5.15.4 List the common reasons that support centers should implement KCS.	Support centers should implement KCS to: <ul style="list-style-type: none"> <li>• Improve First Contact Resolution (FCR)</li> <li>• Provide consistent answers to the same repeat questions</li> <li>• Provide answers to reoccurring complex issues</li> <li>• Respond to and resolve issues faster</li> </ul>
	5.15.5 Describe the responsibilities of the desktop support technician in knowledge management.	The responsibilities of the desktop support technician in knowledge management are to: <ul style="list-style-type: none"> <li>• Use the knowledge base before seeking to solve an incident</li> <li>• Fix knowledge that is incorrect or incomplete, if authorized</li> <li>• Flag knowledge that is incorrect or incomplete if not authorized to fix it</li> <li>• Add knowledge whenever an incident is resolved where knowledge did not exist</li> </ul>

Topic	Competency	Range of Knowledge
	5.15.6 Identify and explain the purpose of common Knowledge Management (KM) metrics that a desktop support technician should understand.	<p>Common Knowledge Management metrics that a desktop support technician should be able to identify and explain include:</p> <ul style="list-style-type: none"> <li>• Solutions created/updated by technician compared to performance targets</li> <li>• Incidents/requests linked to solutions created compared to performance targets</li> <li>• Knowledge Quality index by technician compared to performance targets</li> </ul>

Topic	Competency	Range of Knowledge
5.16 Customer Management Skills	5.16.1 List best practices for customer management during the Incident Management process.	<p>Best practices for customer management during the Incident Management process include:</p> <ul style="list-style-type: none"> <li>• Prepare for the call/on-site visit <ul style="list-style-type: none"> <li>- Take a deep breath</li> <li>- Stop working on other tasks and focus</li> <li>- Get ready to take notes</li> <li>- Prepare your tone of voice</li> </ul> </li> <li>• Greet the customer <ul style="list-style-type: none"> <li>- Provide a salutation</li> <li>- Identify your organization</li> <li>- Identify yourself</li> <li>- Verify the customer's name and entitlement by asking a closed-ended question</li> <li>- Ask an open-ended question to begin the problem-solving process</li> </ul> </li> <li>• Resolve the incident <ul style="list-style-type: none"> <li>- Assist the customer by resolving the incident, redirecting the call, or escalating</li> </ul> </li> <li>• Close the incident <ul style="list-style-type: none"> <li>- Summarize the incident</li> <li>- Ask the customer if there is anything else you can do</li> <li>- Thank the customer</li> <li>- If on the phone, allow the customer to hang up first</li> <li>- Provide documentation to the customer and ensure the information in the service management system is correct</li> </ul> </li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.16.2</p> <p>List the steps for preparing for an on-site customer visit.</p>	<p>Preparation for a customer on-site visit includes:</p> <ol style="list-style-type: none"> <li>1. Review the details of the incident.</li> <li>2. Understand the incident and steps taken to date.</li> <li>3. Confirm customer location.</li> <li>4. Determine configuration items (CIs) affected.</li> <li>5. Review configuration documentation. <ul style="list-style-type: none"> <li>- To confirm the CIs</li> <li>- To determine potential parts required or updates available</li> </ul> </li> <li>6. Gather and prepare possible repair materials to take to the on-site visit.</li> </ol>

Topic	Competency	Range of Knowledge
	<p>5.16.3</p> <p>List steps for arriving at an on-site customer visit.</p>	<p>Steps for arrival at a customer site include:</p> <ol style="list-style-type: none"> <li>1. Knock before entering the customer's office or work area.</li> <li>2. Confirm the customer's name.</li> <li>3. Introduce yourself to the customer and state the reason for your visit, providing the incident number and reported problem.</li> <li>4. Verify that the time is convenient. If not, schedule a follow-up appointment.</li> <li>5. Ask the customer to restate the incident and demonstrate the issue.</li> <li>6. Listen actively and take notes.</li> <li>7. Ask the customer to save and shut down any documents they are currently working on before you start troubleshooting.</li> <li>8. Ask the customer to remove any confidential information that they would not want you to see (i.e., payroll reports, personnel files, strategic plans, etc.).</li> </ol>
	<p>5.16.4</p> <p>Explain the benefits of using the customer's name during a call or on-site visit.</p>	<p>Using the customer's name during a call or on-site visit:</p> <ul style="list-style-type: none"> <li>• Sets the tone for the conversation</li> <li>• Builds rapport between the DST and the customer</li> <li>• Contributes to a positive first impression of the DST and the support center</li> <li>• Serves as a subtle reminder to the customer that you know who he/she is and enables him or her to focus in emotional situations</li> </ul>



Topic	Competency	Range of Knowledge
	<p>5.16.5</p> <p>Identify when to use the customer's formal or informal name.</p>	<p>During formal communication:</p> <ul style="list-style-type: none"> <li>• Use the customer's title and family name</li> <li>• Use business terminology and language</li> <li>• There is little or no social discussion</li> </ul> <p>During informal communication:</p> <ul style="list-style-type: none"> <li>• Titles are not used</li> <li>• Use the customer's first name</li> <li>• Social discussion occurs</li> </ul>
	<p>5.16.6</p> <p>Identify techniques for keeping the customer's attention during an on-site visit.</p>	<p>Keep the customer's attention focused during an on-site visit by:</p> <ul style="list-style-type: none"> <li>• Making eye contact</li> <li>• Using empathetic statements to acknowledge emotion and convey understanding</li> <li>• Using the customer's name to gain attention</li> <li>• If appropriate, asking the customer to show you what the issue is</li> <li>• If appropriate, showing the customer the steps taken to achieve resolution</li> <li>• Asking closed-ended questions to direct the conversation</li> <li>• Paraphrasing to ensure understanding</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.16.7</p> <p>Demonstrate positive body language and behavior while on-site.</p>	<p>Positive body language:</p> <ul style="list-style-type: none"> <li>• Make and maintain eye contact</li> <li>• Keep an open body expression, such as open palms, and avoid crossing your arms or pointing at the customer</li> <li>• Display confidence—stand with your legs about hip-width apart (if standing while talking to the customer) and avoid shifting your body weight from side to side</li> </ul> <p>Professional behavior:</p> <ul style="list-style-type: none"> <li>• Ask permission to sit down at the customer's desk—sit up straight and don't slouch</li> <li>• Never put your feet up on a desk or other equipment</li> <li>• Ask a customer to move items or ask if it is okay if you move items</li> <li>• Replace items as you found them</li> <li>• Avoid eating or drinking at a customer site</li> <li>• Avoid smoking in front of the customer's building</li> <li>• Keep your equipment organized and do not spread out in the customer's work area</li> <li>• Be conscious of personal space</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.16.8</p> <p>Identify habits and situations to avoid when interacting with a customer.</p>	<p>When interacting with a customer, avoid:</p> <ul style="list-style-type: none"> <li>• Asking the customer to repeat information that has already been documented</li> <li>• Answering a call or page during an on-site visit with a customer</li> <li>• Expressing negative opinions about other people, teams, or departments</li> <li>• Speaking too quickly and not fully explaining the incident or resolution</li> <li>• Eating food or chewing gum</li> <li>• Using acronyms, slang, regional expressions, and terms of endearment (e.g., “honey,” “mate,” and “dear”)</li> <li>• Being drawn into an argument with a frustrated customer</li> <li>• Invading personal space</li> <li>• Taking over the customer’s workstation before asking for permission or before allowing the customer to save their work</li> </ul>

Topic	Competency	Range of Knowledge
	5.16.9 Explain how to use silent time effectively.	<p>Silent time is when an customer is performing a function while the DST is waiting, or when the technician is waiting for a computer response and the customer is watching (e.g., during a system reboot). Use silent time effectively by:</p> <ul style="list-style-type: none"> <li>• Building rapport with the customer by engaging in informal communication, if appropriate</li> <li>• Communicating with the customer regarding new releases or new service offerings</li> <li>• Training the customer on how to perform a related task</li> <li>• Explaining the problem and resolution process to the customer</li> </ul>
	5.16.10 Define a drive-by incident.	A drive-by incident is an incident reported directly to the DST by the customer while the technician is on-site to solve another incident or for other purposes.
	5.16.11 Explain how to manage drive-by customer interactions.	<p>Manage drive-by customer interactions by:</p> <ul style="list-style-type: none"> <li>• Actively listening to the customer</li> <li>• Explaining that you are <i>en route</i> to a scheduled customer visit at this time (if that is true)</li> <li>• Directing the customer to contact the support center and explaining that they will be able to provide assistance in a timely manner</li> <li>• Documenting the incident in the service management system, if you take ownership of the incident</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.16.12</p> <p>Describe ways to handle and redirect issues related to non-supported items.</p>	<p>Handle and redirect issues related to non-supported items by:</p> <ul style="list-style-type: none"> <li>• Maintaining a positive service attitude</li> <li>• Explaining what services are offered and/or supported</li> <li>• Document the request and your response in the incident management system</li> <li>• Providing alternatives to handle non-supported issues</li> </ul>
	<p>5.16.13</p> <p>List the steps for putting a customer on hold, if the DST is on the phone with a customer.</p>	<p>If the DST is on the phone with a customer, use the following steps when putting a customer on hold:</p> <ol style="list-style-type: none"> <li>1. Ask the customer for permission.</li> <li>2. Provide a valid reason why.</li> <li>3. Give the customer a reasonable time frame to expect someone to return to the call.</li> <li>4. Wait for a response—remember that the customer's perspective of hold time is much greater than the actual hold time.</li> <li>5. Thank the customer for holding when you return to the call.</li> </ol>

Topic	Competency	Range of Knowledge
	<p>5.16.14</p> <p>List the steps for transferring a call, if the DST is on the phone with a customer.</p>	<p>If the DST is on the phone with a customer and needs to transfer the call, use a “warm transfer” as follows:</p> <ol style="list-style-type: none"> <li>1. Let the customer know the reason for the transfer and get the customer’s agreement.</li> <li>2. Ensure that the customer has your name and number in the event the call does not transfer successfully.</li> <li>3. Place the customer on hold while calling the receiving party.</li> <li>4. Explain the circumstances of the call and transfer all relevant information so that the customer will not have to repeat him/herself.</li> <li>5. Verify that the receiving party is able to assist.</li> <li>6. Connect the customer to the receiving party in a three-way call and introduce the customer.</li> </ol>

Topic	Competency	Range of Knowledge
	<p>5.16.15</p> <p>List the steps for closing an incident or service request.</p>	<p>When closing an incident or service request:</p> <ol style="list-style-type: none"> <li>1. Summarize—use the customer’s name and summarize the incident or service request’s resolution; confirm that the incident/service request has been resolved to the customer’s satisfaction.</li> <li>2. Train and educate the customer—if time permits, allow the customer to perform the task after the resolution has been found.</li> <li>3. Thank the customer—use a standard closing and thank the customer for contacting the support center.</li> <li>4. Offer additional assistance—advise the customer how they may receive additional assistance if required and if time permits, ask the customer if there is anything else you can do.</li> <li>5. Document—provide written confirmation to the customer and update the incident or service request documentation with the appropriate information; update or add to the knowledge base, if necessary.</li> </ol>
	<p>5.16.16</p> <p>List the benefits of customer management.</p>	<p>The benefits of customer management include:</p> <ul style="list-style-type: none"> <li>• Faster incident resolution times</li> <li>• Improved support center productivity</li> <li>• Establishing credibility and enhances the image of the support center</li> <li>• Increased confidence of the DST</li> <li>• Increased level of customer satisfaction</li> </ul>

Topic	Competency	Range of Knowledge
5.17 Active Listening	5.17.1 Explain the principles of active listening.	<p>The principles of active listening include:</p> <ul style="list-style-type: none"> <li>• Be emotionally and physically prepared to listen</li> <li>• Do not interrupt</li> <li>• Pause before replying</li> <li>• Minimize distractions</li> <li>• Document and reference notes</li> <li>• Acknowledge and focus on the speaker with verbal prompts (“yes,” “uh-huh,” etc.)</li> <li>• Paraphrase for clarification</li> <li>• Repeat for verification</li> <li>• Listen for ideas and images, not just words</li> </ul>
	5.17.2 Explain the benefits of active listening.	<p>Benefits of active listening include:</p> <ul style="list-style-type: none"> <li>• More effective incident analysis</li> <li>• More effective response and resolution to the incident or service request</li> <li>• Increased customer satisfaction</li> <li>• Established credibility for support professionals and the support center</li> <li>• Optimized call time</li> <li>• Reduced stress for support professionals and the customer</li> </ul>
	5.17.3 Define paraphrasing.	<p>Paraphrasing means to repeat what the customer said in your own words in order to:</p> <ul style="list-style-type: none"> <li>• Give the customer the chance to agree or disagree with your understanding</li> <li>• Show the customer that you are listening and that you understand</li> </ul>



Topic	Competency	Range of Knowledge
	5.17.4 Identify barriers of active listening.	<p>The following can be barriers to active listening:</p> <ul style="list-style-type: none"> <li>• Pace and rate of speech that is too rapid</li> <li>• Previous experience with the service support center or customer</li> <li>• Background, education, and training</li> <li>• Accent</li> <li>• Language</li> <li>• Asking the wrong questions</li> <li>• Using inappropriate terminology</li> <li>• Background noise</li> <li>• Conversing about outside distractions such as weather, current events, or illness</li> </ul>
5.18 Relationship Building Skills	5.18.1 List strategies for establishing effective relationships with customers.	<p>To establish and maintain effective relationships with your customers:</p> <ul style="list-style-type: none"> <li>• Manage their expectations</li> <li>• Build rapport</li> <li>• Be empathetic</li> <li>• Provide consistent service</li> <li>• Understand how your systems or technology impacts your customer's business</li> <li>• Publicize the support center's accomplishments</li> <li>• Maintain a service attitude</li> <li>• Meet the customer's psychological needs first, and then their business needs</li> <li>• Take ownership</li> <li>• Display a confident attitude</li> </ul>

Topic	Competency	Range of Knowledge
	5.18.2 Explain the importance of matching the customer's communication style.	Matching the customer's communication style is important because it: <ul style="list-style-type: none"> <li>Increases comprehension and understanding</li> <li>Increases the level of customer satisfaction</li> <li>Increases the confidence of the customer in the support professional and the support center</li> <li>Reduces call time</li> </ul>
	5.18.3 Describe how to match a customer's communication style.	Match a customer's communication style by: <ul style="list-style-type: none"> <li>Understanding the customer's level of proficiency</li> <li>Matching the customer's vocal elements, if/when appropriate</li> <li>Matching the customer's vocabulary</li> <li>Using the same level of technical terminology as the customer</li> </ul>
	5.18.4 Define a filter.	A filter is an internal bias or personal viewpoint based on one's experiences, values, culture, education level, language difference, or geography. Filters often lead to miscommunication and can affect communication negatively.

Topic	Competency	Range of Knowledge
	5.18.5 List the steps of the communication process.	The communication process consists of six steps: <ol style="list-style-type: none"> <li>1. Idea/Concept – feelings, emotions, or a motivation to act</li> <li>2. Encoding – the selection of the appropriate words to best express a given thought or concept</li> <li>3. Transmission – the brain sends a signal to the vocal cords and the mouth to speak</li> <li>4. Receiving – sound waves are received as electrical impulses by the receiver</li> <li>5. Decoding – the brain processes the message</li> <li>6. Interpretation – the most critical step in the process, this is when the person receiving the message puts meaning behind it</li> </ol>
5.19 Customer Differentiating	5.19.1 Define customer differentiating.	Customer differentiating means understanding that: <ul style="list-style-type: none"> <li>• 75% of customer satisfaction consists of meeting the customer's psychological needs</li> <li>• Only 25% of customer satisfaction consists of meeting the customer's business needs</li> <li>• Unresolved psychological issues can have a negative affect on incident solving and create customer dissatisfaction</li> </ul>
	5.19.2 Define customer competency.	Customer competency is the customer's ability to understand and perform a task.

Topic	Competency	Range of Knowledge
	<p>5.19.3</p> <p>Describe four customer competency levels.</p>	<p>The four customer competency levels are:</p> <ul style="list-style-type: none"> <li>• <b>Unconscious Incompetence:</b> This individual neither understands or knows how to do something, nor recognizes the specific area of their deficiency.</li> <li>• <b>Conscious Incompetence:</b> Though the individual does not understand or know how to do something, he or she does recognize the deficit, without addressing it.</li> <li>• <b>Conscious Competence:</b> The individual understands or knows how to do something; however, demonstrating the skill or knowledge requires a great deal of concentration.</li> <li>• <b>Unconscious Competence:</b> The individual has had so much practice with a skill that it becomes “second nature” and can be performed easily (typically without concentration).</li> </ul>
	<p>5.19.4</p> <p>Identify ways to adapt to customer competency levels.</p>	<p>Adapt to a customer’s competency level in order to increase communication effectiveness by:</p> <ul style="list-style-type: none"> <li>• Asking open-ended questions initially to gain elaboration as well as an understanding of competency level</li> <li>• Actively listening to the words used in order to ascertain the customer’s level of technical competency</li> <li>• Changing your vocabulary to mirror the level of the customer’s terminology</li> </ul>

Topic	Competency	Range of Knowledge
	5.19.5 Identify ways to encourage and/or praise incident solving attempts by the customer.	Encourage and praise the customer's attempts at resolving the incident by: <ul style="list-style-type: none"> <li>• Always focusing on positive aspects of steps taken</li> <li>• Praising their attempts without sounding condescending</li> <li>• Seeking clarification of any misunderstandings</li> <li>• Relating their actions to ones you have—or would have—taken in similar situations, to validate the customer's self-esteem and build a feeling of teamwork between you and the customer</li> </ul>
5.20 Conflict and Negotiation	5.20.1 List principles of negotiating with a customer.	The principles of negotiating with a customer include: <ul style="list-style-type: none"> <li>• Seeking a win-win solution</li> <li>• Determining the customer's real need and where they may be willing to concede</li> <li>• Determining what you must achieve and where you are willing to concede</li> <li>• Acknowledging the benefit of the customer's ideas</li> <li>• Explaining the support center's concerns with the customer's proposal</li> <li>• Offering alternatives or compromises</li> <li>• Putting yourself in the customer's place</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.20.2</p> <p>Explain the difference between assertiveness, aggressiveness, and passiveness.</p>	<p>Assertiveness:</p> <ul style="list-style-type: none"> <li>• Demonstrates knowledge of your rights and the rights of others</li> <li>• Demonstrates respect for the rights of all</li> <li>• Is generally the healthiest attitude</li> </ul> <p>Aggressiveness:</p> <ul style="list-style-type: none"> <li>• Demonstrates a disregard for the rights of others</li> <li>• Generally results in confrontation and elevated stress</li> </ul> <p>Passiveness:</p> <ul style="list-style-type: none"> <li>• Demonstrates respect only for others' rights</li> <li>• Can result in elevated levels of stress</li> </ul>
	<p>5.20.3</p> <p>List common customer emotions or actions a support professional may have to deal with.</p>	<p>Common customer emotions or actions a support professional may have to deal with include:</p> <ul style="list-style-type: none"> <li>• Frustration</li> <li>• Anger</li> <li>• Defensiveness</li> <li>• Acting judgmental</li> <li>• Irritation</li> <li>• Impatience</li> <li>• Ignorance</li> <li>• Incorrect assumptions</li> </ul>

Topic	Competency	Range of Knowledge
	5.20.4 Explain the difference between empathy and sympathy.	<p>Empathy: identification with and understanding of another's situation, feelings, and motives.</p> <p>Sympathy: 1) (a) A relationship between people or things in which whatever affects one correspondingly affects the other, (b) Mutual understanding or affection; 2) A feeling or expression of pity or sorrow for the distress of another; 3) Harmonious agreement/accord.</p>
	5.20.5 Identify the benefits of demonstrating empathy with the customer.	<p>The benefits of demonstrating empathy toward the customer include:</p> <ul style="list-style-type: none"> <li>• Increases customer confidence in the support center</li> <li>• Creates rapport with the customer</li> <li>• Helps the customer focus and block out distraction</li> <li>• May result in the customer providing unsolicited, unexpected, and helpful information</li> <li>• May result in the incident being resolved quicker</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.20.6</p> <p>Identify signs that a conflict is developing.</p>	<p>Signs that a conflict is developing include:</p> <ul style="list-style-type: none"> <li>• A change in the customer's rate, volume, tone of voice, or verbiage</li> <li>• A shift in the customer's body language (i.e., moves away from the DST, begins shuffling papers, hand gestures become more pronounced)</li> <li>• The customer becomes withdrawn, gives little or no feedback, and avoids making eye contact</li> <li>• The use of words showing emotion such as: <ul style="list-style-type: none"> <li>- Tired of</li> <li>- Displeased</li> <li>- Frustrated</li> <li>- Need</li> <li>- Afraid</li> <li>- "You guys"</li> <li>- Always</li> <li>- Never</li> </ul> </li> <li>• The use of words indicating priority or severity such as: <ul style="list-style-type: none"> <li>- Important</li> <li>- Critical</li> <li>- As soon as possible (ASAP)</li> </ul> </li> </ul>



Topic	Competency	Range of Knowledge
	5.20.7 Identify techniques to reduce and eliminate conflict.	<p>Techniques to reduce and eliminate conflict include:</p> <ul style="list-style-type: none"> <li>• Active listening</li> <li>• Maintain eye contact and positive body language</li> <li>• Let the person vent and refrain from interrupting the customer</li> <li>• Be empathetic</li> <li>• Be respectful</li> <li>• Offer assistance</li> <li>• Find a resolution or identify the next step</li> <li>• Remain positive and confident</li> <li>• Set and manage the customer's expectations</li> <li>• Use the person's name</li> </ul>
	5.20.8 Identify strategies to use when handling an irate customer.	<p>When handling an irate customer:</p> <ul style="list-style-type: none"> <li>• Let the customer vent and do not interrupt</li> <li>• Do not be drawn into an argument</li> <li>• Be empathetic</li> <li>• Recognize that the customer's anger is not personal</li> <li>• Be respectful and polite, but do not let the customer make unreasonable demands</li> <li>• Offer assistance—recommend creative solutions</li> <li>• Remain positive and confident</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.20.9</p> <p>Identify strategies to use when handling an emotional customer.</p>	<p>When handling an emotional customer:</p> <ul style="list-style-type: none"> <li>• Use the customer's name to gain focus</li> <li>• Empathize with the customer</li> <li>• Get the customer to focus on the incident or service request, not the emotion</li> <li>• Reassure the customer that this situation is not insurmountable and that you will resolve it together</li> </ul>
	<p>5.20.10</p> <p>Identify strategies to use when handling a rambling customer.</p>	<p>When you suspect that the customer is a rambler:</p> <ul style="list-style-type: none"> <li>• Wait a reasonable time for the customer to finish, but politely interrupt if the rambling goes on too long</li> <li>• Acknowledge the customer and the information</li> <li>• Take control of the conversation by: <ul style="list-style-type: none"> <li>- Using the customer's name to gain their attention and focus</li> <li>- Using closed-ended questions to gain specific information</li> </ul> </li> <li>• Tell the customer that you will need to finish the conversation so that you can start resolving the issue</li> </ul>

Topic	Competency	Range of Knowledge
	5.20.11 List steps to disengage from a customer who refuses to disengage.	<p>To disengage from a customer who continues to unnecessarily prolong the visit:</p> <ol style="list-style-type: none"> <li>1. Pack up equipment, tools, and parts.</li> <li>2. Use closed-ended questions to lead the customer to closure.</li> <li>3. Recap the incident and your solution.</li> <li>4. Have the customer sign your documentation.</li> <li>5. Direct the customer to contact the support center for future assistance.</li> <li>6. Thank the customer for their time.</li> <li>7. Let the customer know you are on your way to your next scheduled customer appointment.</li> </ol>
	5.20.12 Explain why demonstrating confidence is important.	<p>Demonstrating confidence is important because it:</p> <ul style="list-style-type: none"> <li>• Establishes credibility</li> <li>• Encourages repeat customers</li> <li>• Enhances the reputation of the support center</li> <li>• Increases customer satisfaction</li> <li>• Puts you in control of the situation</li> </ul>

Topic	Competency	Range of Knowledge
5.21 Documenta- tion	5.21.1 Explain the importance of documenting processes and procedures.	Documenting processes and procedures: <ul style="list-style-type: none"> <li>• Helps to ensure consistent service</li> <li>• Facilitates future handling of similar incidents</li> <li>• Creates a resourceful atmosphere by making information readily available to others for future reference</li> <li>• Enables new staff to become competent more quickly</li> <li>• Builds confidence for professional call handling</li> <li>• Encourages adherence to policies and procedures</li> <li>• Enables a support center to more readily adapt to change</li> <li>• Enables continuous improvement over time</li> </ul>
	5.21.2 List the reasons for logging all incidents or service requests.	Logging all incidents or service requests: <ul style="list-style-type: none"> <li>• Creates an audit trail of customer interactions</li> <li>• Provides volume and trending information for better staffing and scheduling</li> <li>• Provides incident frequency information</li> <li>• Provides data that can be used to perform root cause analysis</li> <li>• Provides data for other team members who may be called upon to assist or who may encounter a similar situation in the future</li> <li>• Provides reusable content for a knowledge base</li> <li>• Allows the support center to create an information checklist or FAQ</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.21.3</p> <p>Identify what information should be documented for incidents.</p>	<p>The following information should be documented for every incident or service request:</p> <ul style="list-style-type: none"> <li>• The customer's name (department, company, or organization)</li> <li>• The contact name, if different from the customer name</li> <li>• Contact information (i.e., phone number and e-mail address)</li> <li>• The business impact and urgency of the issue</li> <li>• The priority of the incident or service request</li> <li>• The customer's description of the incident or service request</li> <li>• The environment in which the incident exists</li> <li>• All information pertaining to attempted resolutions</li> <li>• Details of the interaction with the customer relating to the incident or service request</li> <li>• The steps that will be taken after contact with the customer</li> <li>• The next contact date</li> <li>• The commitments made to the customer</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.21.4</p> <p>List the benefits of using proper documentation, such as spelling and capturing complete thoughts.</p>	<p>Using proper grammar and spelling when documenting incidents or service requests:</p> <ul style="list-style-type: none"> <li>• Reflects well on the organization and support professionals</li> <li>• Contributes to Knowledge Management by allowing information to be reused without extensive editing</li> <li>• Demonstrates professionalism</li> <li>• Provides clarity in the event other support personnel need to work on the incident or service request</li> <li>• Reduces misunderstandings and distractions</li> </ul>
	<p>5.21.5</p> <p>List behaviors to avoid when documenting incidents.</p>	<p>When documenting incidents, avoid:</p> <ul style="list-style-type: none"> <li>• Using acronyms</li> <li>• Using emoticons, such as :)</li> <li>• Using slang or regional phrases</li> <li>• Documenting negative references about customers</li> </ul> <p>Record the facts without adding personal opinions that do not add value. Write as if the customer will read what you've written.</p>

Topic	Competency	Range of Knowledge
5.22 Problem Solving	5.22.1 Explain creative thinking and why it is important for problem solving.	<p>Creative thinking is the ability to think “outside the box.” Creative thinking is important for problem solving because it:</p> <ul style="list-style-type: none"> <li>• Provides additional perspectives, such as identifying points of failure that may be causing a problem</li> <li>• Helps identify more options for resolving an issue</li> <li>• Can improve the ability to meet the unique needs of each customer</li> </ul>
	5.22.2 Explain critical thinking and why it is important for problem solving.	<p>Critical thinking is the ability to analyze and critique in order to redesign, remodel, and make better. Critical thinking is important for problem solving because it:</p> <ul style="list-style-type: none"> <li>• Helps the support professional identify points of failure that may be causing a problem</li> <li>• Aids the support professional in identifying weaknesses in a proposed solution, and where it can be made better</li> </ul> <p>Critical thinking requires active listening as well as listening with empathy.</p>

Topic	Competency	Range of Knowledge
	<p>5.22.3</p> <p>Explain the difference between deductive reasoning and inductive reasoning.</p>	<p>Reasoning skills that may be applied to the problem solving process include:</p> <ul style="list-style-type: none"> <li>• Deductive reasoning—“focus on the facts”—is a step-by-step approach to solving problems, used when you are familiar with the problem area. <ul style="list-style-type: none"> <li>- Based on process of elimination</li> <li>- Entails taking logical steps</li> </ul> </li> <li>• Inductive reasoning—“based on intuition”—is an experimental approach used when the problem is unfamiliar. <ul style="list-style-type: none"> <li>- Based on trial and error</li> <li>- Entails research</li> </ul> </li> </ul>
	<p>5.22.4</p> <p>Explain the difference between open-ended and closed-ended questioning.</p>	<p>Open-ended questioning:</p> <ul style="list-style-type: none"> <li>• Invites elaboration or narrative</li> <li>• Is intended to draw out information</li> </ul> <p>Closed-ended questioning:</p> <ul style="list-style-type: none"> <li>• Seeks “yes,” “no,” or limited responses</li> <li>• Focuses on the customer</li> <li>• Is intended to validate or obtain specific information</li> <li>• Is used to control a conversation</li> </ul>



Topic	Competency	Range of Knowledge
5.23 Escalation	5.23.1 Describe escalation.	<p>Two types of escalation are possible in a support center:</p> <ul style="list-style-type: none"> <li>• Functional escalation—moving an incident or service request laterally to a specialist more appropriate to the incident</li> <li>• Hierarchical escalation—moving an incident or service request upwards to a higher authority</li> </ul>
	5.23.2 Identify reasons for escalation.	<p>Escalating an incident or service request is appropriate when:</p> <ul style="list-style-type: none"> <li>• You have exhausted your resources. <ul style="list-style-type: none"> <li>- You have exhausted your skills, expertise, and available resources, and additional technical expertise is required</li> </ul> </li> <li>• The impact of the incident upon the customer's business is high/critical. <ul style="list-style-type: none"> <li>- No existing workaround is available</li> <li>- The incident or service request has a critical impact on the business</li> </ul> </li> <li>• The customer is abusive or demands it.</li> <li>• The SLA dictates an escalation. <ul style="list-style-type: none"> <li>- An incident or service request is approaching breach of a service level commitment or exceeds that commitment</li> </ul> </li> </ul>

Topic	Competency	Range of Knowledge
	5.23.3 List the steps for accepting escalations.	<p>The steps for accepting escalations include:</p> <ol style="list-style-type: none"> <li>1. Review the escalation details to confirm that you are the proper resource and that you understand the incident.</li> <li>2. Accept the escalation by changing the status field to the proper code denoting/communicating to the support center that the escalation has been accepted.</li> <li>3. Respond to the customer within the time frame specified by the OLA.</li> </ol>
	5.23.4 List the steps for escalation by a DST.	<p>When escalating to another resource:</p> <ol style="list-style-type: none"> <li>1. Document all incident or service request details thoroughly.</li> <li>2. Determine via the operating level agreement (OLA) who the most appropriate escalation resource is.</li> <li>3. Escalate the incident via the Incident Management system.</li> <li>4. Inform the customer of the escalation details and reset customer expectations.</li> <li>5. Document the customer interaction so that the support center and escalation resource are both informed.</li> </ol>

Topic	Competency	Range of Knowledge
5.24 Status Reports	5.24.1 Explain the importance of keeping the customer informed of changes in status.	<p>Keeping the customer informed of changes in status is important because:</p> <ul style="list-style-type: none"> <li>• The customer may provide new information affecting resolution efforts</li> <li>• By being informed, the customer can plan other activities more intelligently based on the resolution time</li> <li>• The customer knows that someone is addressing the situation and appropriate resources are being used</li> <li>• It increases customer satisfaction and manages the customer's expectations</li> <li>• It increases employee productivity due to a reduction in the number of status updates</li> <li>• It minimizes the incidences of escalation</li> </ul>
	5.24.2 List the steps for providing live status updates to customers.	<p>When providing live status updates to customers:</p> <ol style="list-style-type: none"> <li>1. Identify yourself and your support center.</li> <li>2. Specify the incident to which you are referring.</li> <li>3. Describe the current status of the incident.</li> <li>4. Mention the next steps or tasks scheduled, the time frame, and the next status update. (Note: It is not acceptable to tell the customer that you will only call when you have more information.)</li> <li>5. Document tasks that are required of the customer and those that are required of the support center.</li> </ol>

Topic	Competency	Range of Knowledge
	<p>5.24.3</p> <p>Explain the steps for leaving a voicemail status update.</p>	<p>When leaving a voicemail status update:</p> <ol style="list-style-type: none"> <li>1. Leave your name, the date and time of the call, and your contact information (including organization and support center).</li> <li>2. Provide a reference number.</li> <li>3. State the purpose of the call.</li> <li>4. Provide an updated status concerning the incident or service request and reset the customer's expectations.</li> <li>5. Describe any action requested from the customer, or provide details on the next steps planned by the support center.</li> </ol>
<p>5.25</p> <p>Customer Service</p>	<p>5.25.1</p> <p>Identify the characteristics of a positive service attitude.</p>	<p>Characteristics of a positive service attitude include:</p> <ul style="list-style-type: none"> <li>• Taking ownership of the incident or service request and seeing it through to resolution</li> <li>• Conveying empathy and a sincere willingness to help</li> <li>• Maintaining a positive attitude, especially in times of change</li> <li>• Treating all customers with respect and courtesy</li> <li>• Listening actively</li> <li>• Referring to an incident as "ours," rather than "yours"</li> <li>• Operating within business guidelines while assisting the customer</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.25.2</p> <p>List the benefits of a positive service attitude.</p>	<p>A positive service attitude boosts customer satisfaction, support center productivity, and employee morale by:</p> <ul style="list-style-type: none"> <li>• Setting the customer's expectations</li> <li>• Creating a positive impression of the support center</li> <li>• Encouraging customer loyalty and repeat business</li> <li>• Setting an example for other support staff to follow, promoting exemplary behavior throughout the support center</li> <li>• Enhancing the quality of future contacts with the customer</li> <li>• Helping the support professional to gain the customer's confidence and trust</li> </ul>
	<p>5.25.3</p> <p>Identify the characteristics of providing consistent service.</p>	<p>Providing consistent service includes:</p> <ul style="list-style-type: none"> <li>• Providing all customers with the same quality of service</li> <li>• Assigning priority levels consistently, in accordance with the SLA</li> <li>• Enforcing standard policies and procedures while meeting customers' needs</li> </ul>

Topic	Competency	Range of Knowledge
	<p>5.25.4</p> <p>Identify the characteristics of excellent customer service.</p>	<p>Excellent customer service is evidenced by:</p> <ul style="list-style-type: none"> <li>• Exceeding customer expectations and resolving incidents in a timely and professional manner</li> <li>• Realizing that customer's needs and expectations may change, and remaining flexible in order to meet those expectations while working within the organization's guidelines</li> <li>• Actively listening to the customer</li> <li>• Demonstrating empathy and acknowledging an understanding of emotions</li> <li>• Proactively keeping customers informed of status through phone, Web, or e-mail updates</li> <li>• Taking initiative to resolve incidents, going above and beyond ordinary effort when necessary</li> <li>• Proactively following-up with a customer to ensure a solution remains successful</li> <li>• Delivering an extra measure of service when expectations have been mixed in the past (e.g., knowledge transfer, productivity tip, etc.)</li> </ul>

Topic	Competency	Range of Knowledge
<b>6.0 Performance Results</b>		
6.1 Metrics and Measurements	6.1.1 Define metric.	A metric in support is any measurement of performance or efficiency. A metric is a measure of an organizations activities and performance as it relates to the management of a process, IT service, or activity.
	6.1.2 Identify types of metrics.	Types of metrics include: <ul style="list-style-type: none"> <li>• Performance indicators are measures of performance.</li> <li>• Key performance indicators (KPIs) are a measure of progress toward achieving one's goals and objectives. KPIs are specific to the goals of the organization.</li> </ul>
	6.1.3 Describe the importance of using metrics.	Capturing support center metrics allows an organization to: <ul style="list-style-type: none"> <li>• Specify required performance levels</li> <li>• Track individual and team performance</li> <li>• Plan for headcount</li> <li>• Allocate resources</li> <li>• Identify the need for service improvements</li> <li>• Acknowledge success and accomplishments</li> <li>• Identify required resources for staffing and scheduling</li> <li>• Determine the schedule</li> <li>• Measure analyst performance</li> <li>• Understand overall organizational performance</li> </ul>

Topic	Competency	Range of Knowledge
	6.1.4 Identify common measurements used in desktop support.	<p>Common measurements used in desktop support include:</p> <ul style="list-style-type: none"> <li>• Desktop Response Time (sec/min)</li> <li>• Mean Time to Restore Service (MTRS) (min/hrs)</li> <li>• Repeat Dispatch (#) per DST</li> <li>• Incidents by Priority/Severity/Type or Category (#, %)</li> <li>• Incidents Handled and Closed per DST (#, %)</li> <li>• Customer Satisfaction Level (% , X/Y)</li> <li>• Unit Cost—\$ per incident, \$ per dispatch, \$ per desktop/device</li> </ul>



Topic	Competency	Range of Knowledge
	6.1.5 Describe common desktop support metrics and their purpose.	<p><b><i>Desktop Response Time:</i></b> The time it takes for a technician to respond to an escalated ticket.</p> <ul style="list-style-type: none"> <li>• Leading indicator</li> <li>• Used to determine how quickly issues are being acknowledged by the service desk or DST within service level parameters</li> </ul> <p><b><i>Mean Time to Restore Service (MTRS):</i></b> The average time between the reporting of an incident and its resolution.</p> <ul style="list-style-type: none"> <li>• Leading indicator (could be lagging indicator)</li> <li>• Used to determine the time frame in which incidents/requests are resolved</li> </ul> <p><b><i>Repeat Dispatch per DST:</i></b> The inverse of first contact resolution, the number of additional visits made after the incident/request was resolved.</p> <ul style="list-style-type: none"> <li>• Leading indicator</li> <li>• Used to determine whether incidents/requests were resolved to customers satisfaction on initial handling</li> </ul> <p><b><i>Incidents by Priority, Severity, and Type:</i></b></p> <ul style="list-style-type: none"> <li>• Used to determine whether issues are being handled in accordance with priority levels and escalation policies</li> <li>• Enables an assessment of trends and the identification of root causes</li> </ul>

Topic	Competency	Range of Knowledge
	6.1.5 Con't.	<p><b><i>Incidents Handled and Closed per DST:</i></b></p> <ul style="list-style-type: none"> <li>• Leading indicator</li> <li>• Used to understand/compare productivity of DST</li> <li>• Number of incidents handled and closed per day, week, and month per DST</li> </ul> <p><b><i>Customer Satisfaction Level:</i></b></p> <ul style="list-style-type: none"> <li>• Lagging indicator</li> <li>• Measures the customer's satisfaction of support services</li> </ul> <p><b><i>Unit Cost—per call/request/incident/desktop:</i></b></p> <ul style="list-style-type: none"> <li>• Unit cost of the support center's activities (includes people, infrastructure, and overhead costs).</li> <li>• Lagging indicator</li> <li>• Measure of the support center's cost-efficiencies</li> </ul> <p><b><i>First Contact Resolution (FCR):</i></b> The percentage of incidents/requests that are resolved on initial contact with the customer.</p> <ul style="list-style-type: none"> <li>• Leading indicator (can also be a lagging indicator, depends on perspective)</li> <li>• Used to measure technician knowledge level compared to the relative complexity of issues</li> </ul>

Topic	Competency	Range of Knowledge
	6.1.6 Describe the impact if the repeat dispatch rate is higher than expected.	A higher than expected repeat dispatch rate results in: <ul style="list-style-type: none"> <li>• Lower customer satisfaction</li> <li>• Lost productivity for the customer</li> <li>• Higher costs for the business</li> <li>• Higher cost per incident/request</li> </ul>
	6.1.7 Explain critical success factors (CSFs).	Critical success factors are areas (I.e., elements of success) that must happen if an IT service, process, plan, project, or activity is to succeed.
	6.1.8 Explain what desktop support should do when reporting performance results.	When reporting performance results, desktop support needs to: <ul style="list-style-type: none"> <li>• Identify the proper <u>audiences</u> (stakeholders) and the metrics they need or use</li> <li>• Provide a <u>purpose</u>, an analysis of the report (trends, achievements)</li> <li>• Identify considerations such as <u>format and frequency</u> when developing performance reports <ul style="list-style-type: none"> <li>- Format of the report <ul style="list-style-type: none"> <li>» Name and numbering scheme</li> <li>» Performance (reporting) period and date produced</li> <li>» Frequency format and style</li> <li>» Availability of report</li> </ul> </li> </ul> </li> </ul>

Topic	Competency	Range of Knowledge
	<p>6.1.9</p> <p>Identify what desktop support should do with the information derived from metrics.</p>	<p>For each metric:</p> <ul style="list-style-type: none"> <li>• Establish processes that will regularly gather the data (who, when, sources)</li> <li>• Set a goal or target for each metric</li> <li>• Regularly compare performance against goals and assess performance</li> <li>• Take actions as necessary to correct and improve performance</li> </ul>
<p>6.2</p> <p>Balanced Scorecard</p>	<p>6.2.1</p> <p>Explain the purpose and components of a Balanced Scorecard.</p>	<p>The purpose of the balanced scorecard is to measure how well the organization (or individual) is functioning and to predict future performance. The balanced scorecard:</p> <ul style="list-style-type: none"> <li>• Translates complex business information into information that's understandable to stakeholders</li> <li>• Fosters alignment of IT and business goals</li> </ul> <p>The four components of the balanced scorecard are:</p> <ul style="list-style-type: none"> <li>• Financial</li> <li>• Customer</li> <li>• Operational Efficiency</li> <li>• Learning and Growth</li> </ul>

## HDI-DST Practice Test

Question #	Question
1	<p>Recognizing that a customer's psychological needs must be met when resolving incidents is called:</p> <ul style="list-style-type: none"><li>A. Customer differentiating</li><li>B. Problem management</li><li>C. Remote support</li><li>D. Root cause analysis</li></ul>
2	<p>What is the best way to minimize conflict with a customer?</p> <ul style="list-style-type: none"><li>A. Ask the customer to calm down.</li><li>B. Inform your supervisor.</li><li>C. Remain friendly towards the customer.</li><li>D. Tell the customer that calls are monitored.</li></ul>
3	<p>A talkative customer can result in extended call times. What is a best practice for disengaging from a customer?</p> <ul style="list-style-type: none"><li>A. Ask the customer to call again later.</li><li>B. Mention that you are very busy.</li><li>C. Recap the customer's actions.</li><li>D. Use open-ended questions.</li></ul>
4	<p>Which situation is most appropriate for an escalation?</p> <ul style="list-style-type: none"><li>A. You are getting ready to take a break.</li><li>B. You are leaving to attend training.</li><li>C. You have exhausted all available resources.</li><li>D. You have little or no experience with the incident.</li></ul>

Question #	Question
5	<p>What is the best way to handle calls related to non-supported items?</p> <ul style="list-style-type: none"><li>A. Advise the customer of other means for getting assistance.</li><li>B. Let the customer know that you are unable to help him or her.</li><li>C. Reprimand the customer for using unsupported software.</li><li>D. Tell the customer to read the service level agreement more carefully.</li></ul>
6	<p>What is the most important reason for providing status updates to customers?</p> <ul style="list-style-type: none"><li>A. Customers have to be in control of their situation.</li><li>B. Customer might inform your supervisor if you do not update them.</li><li>C. Customers need to know when they can get back to work.</li><li>D. Customers want to know so they can tell their coworkers.</li></ul>
7	<p>What is a best practice for documenting incidents?</p> <ul style="list-style-type: none"><li>A. Use acronyms to keep the description brief.</li><li>B. Use correct punctuation.</li><li>C. Use emoticons to indicate the customer's emotions.</li><li>D. Use slang to make your writing livelier.</li></ul>
8	<p>What is a best practice for building positive working relationships with other groups in the support center?</p> <ul style="list-style-type: none"><li>A. Share gossip about other teams.</li><li>B. Share your knowledge.</li><li>C. Treat others the way they treat you.</li><li>D. Treat others nicely if they can help you.</li></ul>

Question #	Question
9	<p>What is the best reason for matching the communication style of your customer?</p> <ul style="list-style-type: none"><li>A. Matching the communication style of your customer decreases the likelihood that the customer will call back.</li><li>B. Matching the communication style of your customer increases customer satisfaction.</li><li>C. Matching the communication style of your customer lets the customer know that you are confident in his or her abilities.</li><li>D. Matching the communication style of your customer shows the customer that you are well-trained.</li></ul>
10	<p>What is the best reason for demonstrating confidence?</p> <ul style="list-style-type: none"><li>A. Demonstrating confidence allows you to show your creativity.</li><li>B. Demonstrating confidence enables you to show off your skills and knowledge.</li><li>C. Demonstrating confidence prevents complaints about the support center.</li><li>D. Demonstrating confidence puts you in control of calls.</li></ul>
11	<p>What is the best description of paraphrasing?</p> <ul style="list-style-type: none"><li>A. Paraphrasing is repeating what the customer has said word for word.</li><li>B. Paraphrasing is repeating what you have said to the customer.</li><li>C. Paraphrasing is using your own words to confirm your understanding of what the customer has said.</li><li>D. Paraphrasing is using your memory to recall what the customer said.</li></ul>
12	<p>You have asked a customer to reboot his or her computer. What is the best way to use the silent time?</p> <ul style="list-style-type: none"><li>A. Answer another call.</li><li>B. Place the customer on hold.</li><li>C. Respond to an open e-mail inquiry.</li><li>D. Review the call history.</li></ul>

## Question #

## Question

- 13      What information should be documented for every incident?
- A. All information pertaining to attempted and successful resolutions.
  - B. Only the best solution for the incident.
  - C. The customer's feelings about the support center.
  - D. Whatever the customer asks you to record.
- 14      What is the best reason for logging all incidents?
- A. Logging incidents allows analyst activity to be monitored.
  - B. Logging incidents ensures that all information is secure.
  - C. Logging incidents prevents customers from complaining.
  - D. Logging incidents provides information that can be reused.
- 15      What is the most likely benefit of recording all incidents?
- A. Recording all incidents allows the support center to be proactive.
  - B. Recording all incidents demonstrates the effectiveness of the support center.
  - C. Recording all incidents establishes service levels.
  - D. Recording all incidents saves the support center money.
- 16      You have just received a customer call, but there are other team members laughing and joking in your area. What is your best course of action?
- A. Answer the phone and place the customer on hold until you finish talking to your teammates.
  - B. Ask your team members to please quiet down before answering the phone.
  - C. Place your finger over the microphone on the headset and ask your team members to be quiet.
  - D. Place your hand over the ear not covered by the headphones to block out the noise.



Question #	Question
17	<p>What is the best reason for having security policies in the support center?</p> <ul style="list-style-type: none"><li>A. Security policies are necessary to follow legal advice.</li><li>B. Security policies deliver compliant procedures and processes.</li><li>C. Security policies help manage and control assets.</li><li>D. Security policies protect the company and its customers.</li></ul>
18	<p>What is the best example of active listening?</p> <ul style="list-style-type: none"><li>A. Identifying content for the knowledge base.</li><li>B. Reading your e-mail while talking on the phone.</li><li>C. Researching incidents in the database.</li><li>D. Taking notes while you talk to the customer.</li></ul>
19	<p>What is the purpose of asking open-ended questions?</p> <ul style="list-style-type: none"><li>A. Open-ended questions are intended to obtain specific information.</li><li>B. Open-ended questions attempt to obtain elaboration or narrative.</li><li>C. Open-ended questions focus the customer.</li><li>D. Open-ended questions seek single-word responses.</li></ul>

Question #	Question
20	<p>Which message follows best practices for writing business e-mails?</p> <ul style="list-style-type: none"><li>A. Dear Sarah, we have completed the work you requested on Mr. Smith's printer. The tech found that the printer cartridge ran out of ink and needed to be replaced. We're available anytime you need us. Thanks.</li><li>B. Dear Sarah, we have completed the work you requested on Mr. Smith's printer. The printer cartridge was out of ink and has been replaced. It is now working properly. If there is anything else we can do for you, please contact the support center at extension 4357. Thank you.</li><li>C. Sarah, the printer was fixed for Mr. Smith. I guess he didn't know the printer was out of ink. Rookie mistake :) BTW, tell him to buzz us next time he needs something.</li><li>D. Hey Sarah! Finished the work you requested on Mr. Smith's printer. The tech found that the printer cartridge ran out of ink and needed to be replaced. We're available at anytime you need us. Thank you.</li></ul>
21	<p>What is the best reason for empathizing with a customer?</p> <ul style="list-style-type: none"><li>A. Empathizing with a customer lets the customer know that you are familiar with his or her department.</li><li>B. Empathizing with a customer lets the customer know that you feel sorry for him or her.</li><li>C. Empathizing with a customer lets the customer know that you understand how he or she feels.</li><li>D. Empathizing with a customer lets the customer know that you will fix his or her incident.</li></ul>
22	<p>What action should be <i>avoided</i> when documenting incidents?</p> <ul style="list-style-type: none"><li>A. Recording just the facts.</li><li>B. Documenting all of the information.</li><li>C. Recording customer emotions.</li><li>D. Documenting in real-time.</li></ul>

## Question #

## Question

- 23 What is the best example of an open-ended question?
- A. Is your monitor turned on?
  - B. Describe the steps you have taken to resolve the incident so far.
  - C. When did the incident first appear?
  - D. Which application are you having an incident with?
- 24 A customer with an important presentation to give in one hour is upset because a document will not print. You ask the customer questions about the incident, but the customer keeps talking about what will happen if the document is not available. What should you do to get the customer to refocus on the incident?
- A. Allow the customer to vent.
  - B. Interrupt the customer.
  - C. Tell the customer they must calm down first.
  - D. Put the customer on hold.
- 25 What is an important benefit of active listening?
- A. Active listening improves the quality of incident analysis.
  - B. Active listening increases talk time.
  - C. Active listening causes stress for support professionals.
  - D. Active listening decreases the number of incoming calls.
- 26 A customer calls because she is having trouble accessing the Internet. The customer is angry that this incident keeps recurring and begins to complain about the network team. What is your best way to respond to the customer?
- A. Ask the customer to document all previous interactions.
  - B. Empathize with the customer before addressing the incident.
  - C. Ask the customer to complete a customer satisfaction survey.
  - D. Agree that the network team is not doing a good job.

## Question #

## Question

- 27 What is the best way to match a customer's communication style?
- A. Make the customer feel like your friend.
  - B. Mimic the customer's accent.
  - C. Talk in the same volume as the customer.
  - D. Use the same level of terminology as the customer.
- 28 When is it most appropriate to escalate incidents to a supervisor?
- A. Escalate an incident if the customer starts to complain about the support center.
  - B. Escalate an incident if the incident has a high business or financial impact.
  - C. Escalate an incident if the customer has never received support before.
  - D. Escalate an incident if the support center is too busy to handle the call.
- 29 What is the best description of a team?
- A. A team is a forum for creativity and self expression.
  - B. A team is a group of people working as one.
  - C. A team is a group of strong personalities.
  - D. A team is an open, honest environment.
- 30 What is the most likely benefit of asking closed-ended questions?
- A. Asking closed-ended questions allows you to gather call history information.
  - B. Asking closed-ended questions allows you to get a detailed incident description.
  - C. Asking closed-ended questions allows you to maintain control of the call.
  - D. Asking closed-ended questions allows you to understand the customer's environment.

### *Practice Test Answers*

1. A
2. C
3. C
4. C
5. A
6. C
7. B
8. B
9. B
10. D
11. C
12. D
13. A
14. D
15. A
16. B
17. D
18. D
19. B
20. B
21. C
22. C
23. B
24. A
25. A
26. B
27. D
28. B
29. B
30. C