

# **Service Desk and Support Manager Standards**



## Service Desk and Support Manager (SDI SDM) Qualification Standards

This document contains SDI's Service Desk and Support Manager (SDI SDM) qualification standards. It provides the information, the requirements, and the guidance necessary for test creators, curriculum developers, test takers and test administrators.

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

Open - means that the standards are published in order to allow organizations to use the standards to improve their services, for individuals to study the standards in preparation for an exam, and for training and consulting providers to develop offerings that align with the standards.

International - means that a committee of professionals with international experience and/or who 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 and shared service desks.

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 service desk.

SDI 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 qualified professionals to support their business needs. SDI qualifications provide:

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

### Purpose

The Service Desk and Support Manager exam is based on the SDI SDM standard.

The competencies required for each SDI qualification were identified and approved by SDI's International Committee for Individual Standards, a group of industry experts and experienced practitioners from a number of organisations, in order to:

- establish an international benchmark to recognise the breadth of knowledge required to successfully fulfil the role
- document the necessary skills
- provide a mechanism to recognise and develop the breadth of knowledge required for developing individuals aligned to international industry standards
- provide leadership to the IT support industry by providing a recognised qualification in IT customer service and support

The SDI qualification is an open qualification standard that is independent of any other training curriculum. SDI is the administrator, facilitator and arbitrator of the standards. The exams are independently administered and proctored.

### Qualification Objectives

SDI's Service Desk and Support Manager Qualification recognizes an individual's knowledge of the competency requirements and skills required to be a manager of a service desk. A person who passes the SDM exam can be expected have the skills to:

- Develop and deliver service desk and support strategies to fully underpin the organization's business strategy and objectives
- Demonstrate the key leadership and management competencies needed to be a successful Service Desk and Support Manager – to include operational management, organizational change management, human resources, team development, service desk promotion, risk and financial management
- Develop and deliver service desk and support technology strategies to underpin strategic objectives
- Interface the service desk with other IT functions, processes and standards to maximize the efficiency and effectiveness of IT
- Design, contract and deliver service desk processes and services to deliver exceptional customer service and support

### Name of the Qualification

SDI's Service Desk and Support Manager (SDM)

## Target Demographics

SDI's SDM exam and training materials are aimed at individuals who have one to three years of management experience in the support profession. Examples of professional job titles include:

- Team Leader
- Supervisor
- Service Desk Manager
- Support Manager
- Service Delivery Manager
- Customer Service Manager

Individuals interested in achieving an SDI qualification will come from all industry sectors across a range of large, medium, and small sized Service Desks. They will have a desire to be recognized for demonstrating an understanding of the important topics listed in these standards in order to pursue employment and advancement opportunities in the support industry.

## Prerequisites For Taking The Exam

Prerequisites for passing the exam will be a working and comprehensive knowledge and understanding of the professional demands placed on a Service Desk and Support Manager, the standard process requirements for most support operations and the technology available to Service Desks. Individuals should not attempt to take the exam unless they:

- have a working knowledge of the support industry
- have a practical knowledge of the following standards
- have a strong desire to progress in the IT customer service and support profession

## Qualification Structure and Weighting

Concept	SDM Weighting %
The Strategic Role of the Service Desk	15
Management Competencies	20
Business Integration	20
Operational Management	20
Tools and Technologies	5
Human Resource and Team Development	20
	<b>100%</b>

## How Is An SDI Standard Organized?

The SDI role-based standards are organized into concepts that are defined and supported by one or more topics against which a service desk and support professional can be assessed.

Within each topic there are one or more competencies. For each competency there is a range of knowledge. If one approaches the standard as if interviewing for a position in a service desk, 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 service desk position will possess the range of knowledge for each competency.

To completely cover a range of knowledge for some of the competencies would be an endless task (e.g., "Explain the responsibilities of the service desk"). In such cases, SDI's International Qualifications Standards Committee has either defined the information in the range of knowledge to cover 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 common to have a similar set of competencies in more than one qualification standard, with the range of knowledge varying between standards. For example, the standard for a service desk and support analyst and a service desk and support manager may include the competency, "Explain the objectives of change management." The range of knowledge for this competency will differ in each of the standards. The standard for the service desk and support analyst may include an awareness of the change management process, while the standard for a service desk and support manager may contain a more detailed description of how to use the change management process within the service desk.

## How Do I Prepare For The Exam?

Attending a training course is the preferred option for most candidates seeking certification. Training will assist course participants in preparing to take a qualification exam while also building skills valuable to one's profession in the support industry. Training will help candidates to understand the best practices and concepts captured within an SDI standard as well as how to apply them within the workplace.

All SDI qualification exams are weighted. The exam questions are classified according to the categories contained in the standards. The exam is designed to test the candidate's mastery of the knowledge in each category. If you have limited time to study for the exam, we recommend that you focus your review on the categories that have the highest weight percentage.

## What Should I Expect From The Exam?

The exams are randomly generated from a pool of pre-authorized exam questions in order to deliver a different exam each time.

- Each exam consists of sixty (60) multiple-choice questions
- Candidates will have sixty (60) minutes to complete the exam
- The passing score for the exam is 75%. Approved Instructors must achieve a score of 87% or higher to qualify to facilitate SDI training courses

## Other SDI Qualifications:

**SDF** is the acronym that is used for the Service Desk Foundation

**SDA** is the acronym that is used for the Service Desk and Support Analyst

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## Committee Members

SDI would like to thank the members of the International Standards Committee for their time and contribution to the standards:

Tony Albert	ITSM Experts
Simon Ball	TNT Express ICS
Barry Corless	Global Knowledge
Ken Goff	K Goff M Ltd
Kate Hamblin	Pink Elephant
Jaqi Howarth	Independent Consultant
Sue Hayward	Service Desk Institute
Jo Johns	Jo Johns Education
Louise McDonald	Swinton Group Ltd
Jessica Milner	Tickets.com
Frieda Morton-Evans	FME ITIL Solutions
Lynne Nash	Independent Consultant
Tony Ranson	Independent Consultant
Susan Storey	Susan Storey Associates Ltd
Elaine Wilkinson	QA Ltd
Daniel Wood	Service Desk Institute

1 The Strategic Role of the Service Desk		
Topic	Competency	Range of knowledge and understanding for criteria (not exhaustive)
1 The Service Desk	1 Describe the role of the service desk	The role of service desk is to serve as the single point of contact (SPOC) for all IT related issues.
	2 Explain the responsibilities of the service desk	<p>The responsibilities of the service desk are to:</p> <ul style="list-style-type: none"> <li>▪ Follow the organization's policies, processes and procedures</li> <li>▪ Balance support expenses to keep IT support performing at the optimum levels of quality and cost effectiveness</li> <li>▪ Develop and implement service desk goals that align with the organization's business objectives</li> <li>▪ Demonstrate the value and contribution of the service desk to the organization</li> <li>▪ Identify and initiate service improvement initiatives</li> <li>▪ Manage customer expectations</li> <li>▪ Provide a clear communication channel between customers and the IT organization</li> <li>▪ Contribute to knowledge creation and maintenance</li> <li>▪ Develop and implement effective processes and procedures to ensure consistent service support</li> <li>▪ Be aware of appropriate societal and environmental issues and responsibilities relating to the service desk</li> <li>▪ Adhere to, police and support the organization's security policies/requirements</li> <li>▪ Manage compliments and complaints relating to IT service issues</li> <li>▪ Represent the IT organization to its customers</li> </ul>

1 The Strategic Role of the Service Desk		
Topic	Competency	Range of knowledge and understanding for criteria (not exhaustive)
	3 Describe the characteristics of a successful service desk	<p>The characteristics of a successful service desk include:</p> <ul style="list-style-type: none"> <li>▪ Leadership - there is clear direction and strong management</li> <li>▪ Commitment to quality - consistently delivers support services that meet the organization's business needs and carries out quality improvement programmes</li> <li>▪ Policy and strategy - policies are documented, adhered to, regularly reviewed and monitored</li> <li>▪ People management - roles and responsibilities are clearly defined</li> <li>▪ Resources - resource management and capacity planning are in place</li> <li>▪ Processes - integrated service management processes are in place and are regularly reviewed</li> <li>▪ Employee satisfaction - regular service desk employee satisfaction measures are in place</li> <li>▪ Customer satisfaction - regular customer satisfaction surveys are in place</li> <li>▪ Performance results - regular performance metrics are produced, analyzed and achieved in order to identify opportunities for improvement, such as:               <ul style="list-style-type: none"> <li>▪ KPIs</li> <li>▪ Operational metrics</li> <li>▪ Unit costs</li> <li>▪ Total costs</li> </ul> </li> <li>▪ Benchmarking and certification to industry standards/programmes are undertaken</li> <li>▪ Service ethics – processes are in place for building strong customer relationships and loyalty</li> <li>▪ Credibility – is respected by customers and the entire support organization</li> </ul>
2 Vision and Mission Statements	1 Describe the purpose and objectives of a service desk vision statement	<p>The purpose of a service desk vision statement is to provide a longer term view of what the service desk wants to become.</p> <p>The objectives include to:</p> <ul style="list-style-type: none"> <li>▪ Promote the image of the service desk</li> <li>▪ Ensure that all staff understand the vision and that they consistently work towards achieving it</li> <li>▪ Encourage staff to develop skills that support the vision</li> </ul>
	2 Describe the purpose of a service desk mission statement	<p>The purpose of having a service desk mission statement is to define the service desk's reason for existing in a clear and simple manner. It should be regularly reviewed to ensure it is aligned with the organization's business goals and supported by appropriate critical success factors and key performance indicators. It outlines:</p> <ul style="list-style-type: none"> <li>▪ What you are doing</li> <li>▪ Why you are doing it</li> </ul> <p>The mission statement typically includes:</p> <ul style="list-style-type: none"> <li>▪ A purpose statement - what the service desk is aiming to achieve</li> <li>▪ Underpinning objectives - the business practices required to achieve the stated purpose</li> </ul>



1 The Strategic Role of the Service Desk		
Topic	Competency	Range of knowledge and understanding for criteria (not exhaustive)
	3 Explain the objectives of a service desk mission statement	<p>The objectives of a mission statement include:</p> <ul style="list-style-type: none"> <li>▪ Identifying the main purpose and role of the service desk</li> <li>▪ Aligning support goals with the organization's goals</li> <li>▪ Inspiring commitment and buy-in to the service desk</li> </ul>
3 Service Desk Best Practices	1 Explain the concepts of good practice and best practice	<p>Good Practice – A collection of specific methods that identify the accepted common way of doing something. Sources of good practice include standards, frameworks, proprietary knowledge (intellectual property) of individuals and organizations and are supported by complementary guidance for particular industry sectors.</p> <p>Best Practice - A technique or methodology that has consistently shown results superior to those achieved using other means and that is used as a benchmark.</p>
	2 Identify common business standards and best practices relevant to the service desk	<p>Common business standards and best practices relevant to the service desk include:</p> <ul style="list-style-type: none"> <li>▪ Formal standards relating to IT best practice such as: <ul style="list-style-type: none"> <li>▪ ISO/IEC 20000 – IT service management</li> <li>▪ ISO 9000 – Quality management</li> <li>▪ ISO/IEC 27000 – Security management</li> <li>▪ ISO/IEC 15504 - IT process assessment</li> <li>▪ ISO 14000 - Environmental management</li> </ul> </li> <li>▪ Formal IT governance and audit assessment standards such as: <ul style="list-style-type: none"> <li>▪ The Control Objectives for Information and related Technology (CobIT®)</li> <li>▪ Sarbanes Oxley (SOX)</li> <li>▪ SDI Service Desk Certification (SDC)</li> </ul> </li> <li>▪ Industry good/best practice guidance such as: <ul style="list-style-type: none"> <li>▪ Capability Maturity Model Integration (CMMI)</li> <li>▪ SERVQUAL</li> </ul> </li> <li>▪ IT Service Management (ITSM) for example: <ul style="list-style-type: none"> <li>▪ ITIL®</li> <li>▪ SDI Individual Certification</li> </ul> </li> <li>▪ Formal business best practice quality models such as: <ul style="list-style-type: none"> <li>▪ European Forum for Quality Management (EFQM)</li> <li>▪ Six Sigma</li> <li>▪ Total Quality Management (TQM)</li> <li>▪ Kaizen</li> </ul> </li> </ul>

1 The Strategic Role of the Service Desk		
Topic	Competency	Range of knowledge and understanding for criteria (not exhaustive)
	3 Explain the benefits of following best practice	<p>The benefits of following best practice include:</p> <ul style="list-style-type: none"> <li>▪ Increased consistency and accountability</li> <li>▪ Improved governance</li> <li>▪ Reduced business risk</li> <li>▪ Greater control of IT infrastructure</li> <li>▪ Areas for improvement are identified</li> <li>▪ Costs are maintained and managed effectively</li> <li>▪ Increased employee morale</li> <li>▪ Increased customer satisfaction</li> <li>▪ Commitment to quality is demonstrated</li> <li>▪ Improvement development time is reduced by using proven processes and approaches</li> <li>▪ Achieving certification demonstrates tangible evidence of following best practice</li> </ul>
	4 Explain the purpose of following a formal industry standard or good/best practice	<p>The purposes for following a formal industry standard or good/best practice are:</p> <ul style="list-style-type: none"> <li>▪ To meet IT governance</li> <li>▪ To meet industry-sector regulatory requirements</li> <li>▪ To demonstrate compliance (providing appropriate supporting evidence)</li> </ul>
4 Global Service Desk Perspective	1 Recognize the challenges of managing a global service desk	<p>A global service desk perspective requires an awareness of:</p> <ul style="list-style-type: none"> <li>▪ Different time-zones</li> <li>▪ Language support</li> <li>▪ Cultural differences</li> <li>▪ Services alignment</li> <li>▪ Local currency</li> <li>▪ Public holidays</li> <li>▪ The organization's business mission</li> <li>▪ Legal requirements and local governance (e.g. software licencing implications)</li> </ul>
5 Service Ethics	1 Explain the purpose of a code of conduct	<p>The purpose of a code of conduct is to:</p> <ul style="list-style-type: none"> <li>▪ Manage the organization's risk</li> <li>▪ Document expected behaviours to ensure that all employees understand what the organization expects of them</li> <li>▪ Document the organization's standards of moral and ethical behaviour</li> <li>▪ Serve as a source of clarity for employees where there is vague or questionable areas of behaviour</li> <li>▪ Merge and align behaviour with the organization's values</li> <li>▪ Prevent litigation</li> <li>▪ Drive consistency</li> </ul>

1 The Strategic Role of the Service Desk		
Topic	Competency	Range of knowledge and understanding for criteria (not exhaustive)
	2 Summarize the effects of working with a code of conduct	<p>Working with a code of conduct:</p> <ul style="list-style-type: none"> <li>▪ Facilitates identification of potential risks to the organization by responding to areas of behaviour that need addressing</li> <li>▪ Is a means to identify opportunities to differentiate your services from competitors to attract customers, build customer loyalty and become a partner of choice with suppliers in order to create value for shareholders</li> <li>▪ Assists in attracting and retaining the best staff</li> <li>▪ Encourages greater professionalism and respect</li> </ul>
	3 Recognize the effect of honouring commitments made to customers, team members, and the organization	<p>Honouring commitments made to customers, team members, and the organization improves:</p> <ul style="list-style-type: none"> <li>▪ Customer satisfaction</li> <li>▪ Trust</li> <li>▪ Credibility</li> <li>▪ Employee morale</li> <li>▪ Accountability</li> </ul>
	4 Describe the typical expectations of customers	<p>Customers expect:</p> <ul style="list-style-type: none"> <li>▪ Their issues to be resolved within an acceptable time-frame</li> <li>▪ The service desk to be in control of what is happening with their issue, regardless of who they speak to</li> <li>▪ For their expectations to be managed in a professional manner</li> <li>▪ To be kept informed and advised of deviations from agreed action plans in good time</li> <li>▪ To be spoken to in standard business language – no technical jargon</li> <li>▪ To be provided with good decision making data and feedback</li> <li>▪ To be able to provide feedback about the service provided</li> <li>▪ To receive consistent and courteous service</li> <li>▪ To receive value for money</li> </ul>
6 Social Responsibility	1 Explain how the service desk can actively demonstrate its commitment to the organization's social responsibility policy	<p>Areas where the service desk can actively demonstrate its commitment to a social responsibility policy include:</p> <ul style="list-style-type: none"> <li>▪ Power saving initiatives</li> <li>▪ Recycling</li> <li>▪ Complying with relevant policies and legislation for environmental and recycling</li> <li>▪ Ensuring health and safety guidelines are followed</li> <li>▪ Participating in community and charitable projects</li> <li>▪ Using green products where possible</li> </ul>

2 Management Competencies		
Topic	Competency	Range of Knowledge
1 The role of the Service Desk and Support Manager	1 Demonstrate the skills required to be an effective Service Desk and Support Manager	<p>The skills required to be an effective Service Desk and Support Manager include:</p> <ul style="list-style-type: none"> <li>▪ People-management and team building skills</li> <li>▪ Direction-setting and strategic planning capabilities</li> <li>▪ Excellent communication and influencing skills</li> <li>▪ Marketing and selling ability in order to promote the service desk</li> <li>▪ An understanding of how IT and IT service management works</li> <li>▪ A good understanding of the customer's business</li> <li>▪ The ability to question what is done and why in order to drive continual service improvement programmes</li> <li>▪ Coaching skills</li> <li>▪ Time management skills</li> <li>▪ The ability to lead by example</li> </ul>
	2 Describe the routine responsibilities of a Service Desk and Support Manager	<p>The Service Desk and Support Manager's routine responsibilities include:</p> <ul style="list-style-type: none"> <li>▪ Achieving delivery targets for customer service and support performance</li> <li>▪ Promotion of the service desk to the customer base</li> <li>▪ Promotion of the service desk and service processes across the IT organization</li> <li>▪ Staff welfare, development and training</li> <li>▪ Service reporting and operational performance reviews</li> <li>▪ Auditing, improving and documenting the processes used by the service desk</li> <li>▪ Liaising with the organization's senior management to promote the service desk as a core business asset</li> <li>▪ Being aware of the financial management and the costs associated with running a service desk</li> </ul>
	3 Describe the strategic responsibilities of a Service Desk and Support Manager	<p>The Service Desk and Support Manager's strategic responsibilities include:</p> <ul style="list-style-type: none"> <li>▪ Implementing service desk strategies that support the organization's business strategy</li> <li>▪ Understanding the desired/expected role of the IT service desk in supporting the organization's strategic plans</li> <li>▪ Recognizing the IT service desk activities required to support the organization's strategic plans</li> <li>▪ Communicating the relationship between the IT service desk and the strategic plans of the organization</li> </ul>
	4 Explain the importance of documenting processes and procedures	<p>Documenting processes and procedures:</p> <ul style="list-style-type: none"> <li>▪ Ensures consistent, effective and efficient service</li> <li>▪ Creates a productive and resourceful atmosphere <ul style="list-style-type: none"> <li>▪ Makes the induction process easier</li> <li>▪ Allows others to perform tasks when person responsible for the role is unavailable</li> <li>▪ Encourages adherence to processes and procedures</li> </ul> </li> <li>▪ Builds analysts' confidence for professional call management</li> </ul>

2 Management Competencies		
Topic	Competency	Range of Knowledge
2 Business Knowledge	1 Explain business and IT integration	Business and IT integration means to use information technology service management (ITSM) processes and approaches to support the integration of IT services with the organization's stated business requirements.
	2 Explain strategic awareness	Strategic awareness means: <ul style="list-style-type: none"> <li>▪ Understanding the strategic goals, objectives and key business processes of the organization being supported</li> <li>▪ Understanding how and where to acquire knowledge of the organization's strategic plans</li> <li>▪ Understanding the intention of the strategic plans of the organization</li> <li>▪ Understanding how IT services contribute to meeting the organization's goals</li> </ul>
	3 Recognize opportunities for greater participation in strategic decisions	Opportunities for greater participation in strategic decisions include: <ul style="list-style-type: none"> <li>▪ Taking a proactive approach to developing and supporting strategic initiatives</li> <li>▪ Participating in management decision making</li> <li>▪ Demonstrating business vision, insight and judgement</li> <li>▪ Being involved in finding and developing new business opportunities</li> </ul>
3 Strategic Development	1 Develop strategies aligned to the organization's resources, that are designed to take advantage of business opportunities	In order to develop clear, insightful strategies: <ul style="list-style-type: none"> <li>▪ Develop well-defined service desk goals and objectives that support business and IT goals</li> <li>▪ Network with people in other organizations and within the support industry and your communities</li> <li>▪ Build close relationships with second and third-line support teams, other service providers and the wider industry</li> <li>▪ Undertake forward planning/brainstorming sessions with your team to identify opportunities for involvement in business development activities</li> <li>▪ Undertake an assessment, or current state analysis (CSA), including e.g. a SWOT/GAP analysis of the service desk</li> <li>▪ Communicate the vision and strategy on an ongoing basis and request feedback</li> <li>▪ Research all available media to obtain strategic management guidance</li> <li>▪ Communicate how the service desk assists the organization to meet its business objectives</li> </ul>

2 Management Competencies		
Topic	Competency	Range of Knowledge
	2 Identify the activities required to obtain support from critical resources and remove barriers	<p>To obtain support from critical resources and remove barriers:</p> <ul style="list-style-type: none"> <li>▪ Ensure objectives are presented in the appropriate context and language</li> <li>▪ Obtain tangible, ongoing and practical management and inter-departmental support</li> <li>▪ Ensure all projects have formal status e.g. <ul style="list-style-type: none"> <li>▪ They are costed</li> <li>▪ Contain a written business case</li> <li>▪ Have allocated resources</li> </ul> </li> <li>▪ Develop messages that address the concerns of all parties to demonstrate understanding</li> <li>▪ Develop a structured approach to communication in order to verify the approach, the clarity and common understanding</li> <li>▪ Identify and communicate business and operational benefits</li> </ul>
	3 Describe the processes and techniques required to obtain senior board approval	<p>Processes and techniques required to obtain senior board approval include:</p> <ul style="list-style-type: none"> <li>▪ Presenting the issues, options, recommendations for action, costs and benefits to the appropriate senior audience – e.g. the board</li> <li>▪ Performing a risk analysis</li> <li>▪ Developing a business case for the proposed option</li> <li>▪ Developing a resources and time plan for action</li> <li>▪ Canvassing and developing some ideas and options in advance with key stakeholders</li> <li>▪ Developing alternative plans and options as required</li> </ul>
	4 Demonstrate a practical understanding of commercial management of the service desk	<p>To manage the service desk as a business:</p> <ul style="list-style-type: none"> <li>▪ Create and maintain the service desk and the supporting processes and procedures, including: <ul style="list-style-type: none"> <li>▪ Team responsibilities</li> <li>▪ Deliverables</li> <li>▪ Expectations</li> <li>▪ Reporting</li> <li>▪ Auditing and compliance</li> </ul> </li> <li>▪ Communicate clear deliverables and influence expectations</li> <li>▪ Adhere to agreed service levels</li> <li>▪ Produce regular progress reports</li> <li>▪ Manage the service desk as a business - balancing costs, performance and quality</li> <li>▪ Manage the professional development of service desk staff</li> <li>▪ Define strict time-lines and budgets</li> <li>▪ Determine the impact of proposed services on the success of the organization as a whole</li> <li>▪ Promote the service desk's services</li> <li>▪ Seek customer input to new services taking account of: <ul style="list-style-type: none"> <li>▪ Interaction costs</li> <li>▪ Cost of ownership</li> </ul> </li> </ul>

2 Management Competencies		
Topic	Competency	Range of Knowledge
4 Financial Management	1 Describe the objectives of financial management	<p>The objectives of financial management include:</p> <ul style="list-style-type: none"> <li>▪ Financial management of IT services</li> <li>▪ To manage the cost of providing IT services</li> <li>▪ To align IT service costs to business processes or supporting services</li> <li>▪ To support customers and the organization by delivering value for money</li> <li>▪ To identify and manage the cost of the role of IT in assisting the organization to achieve its objectives</li> </ul>
	2 Summarize the activities involved in financial management	<p>The activities involved in financial management are:</p> <ul style="list-style-type: none"> <li>▪ Accounting <ul style="list-style-type: none"> <li>▪ Keeping track of actual spend on the desk</li> </ul> </li> <li>▪ Budgeting <ul style="list-style-type: none"> <li>▪ Capital vs. Operating costs</li> <li>▪ Fixed vs. Variable costs</li> <li>▪ Direct vs. Indirect costs</li> </ul> </li> <li>▪ Charging (billing) <ul style="list-style-type: none"> <li>▪ Understand the value of charging for IT Support services</li> </ul> </li> <li>▪ ROI – Return on investment</li> <li>▪ Unit Cost - calculates the unit cost of delivering a service</li> <li>▪ Accountability - budget for and obtain value for money from investments and suppliers</li> </ul>
	3 Describe Return on Investment (ROI)	<p>Return on investment and its calculation is typically defined by each organization and is:</p> <ul style="list-style-type: none"> <li>▪ A method to justify investments</li> <li>▪ A financial calculation used to determine the time it will take to recover the costs of the investment (payback period)</li> <li>▪ A measure of the value of the investment</li> <li>▪ An assessment of cost and benefits</li> </ul>
	4 List the basic steps used to produce a business case	<p>The basic steps used to produce a business case are:</p> <ul style="list-style-type: none"> <li>▪ Identify tangible benefits such as cost savings and/or productivity improvements</li> <li>▪ Identify intangible benefits such as operational quality, time savings for customers</li> <li>▪ Develop options and recommendations, with associated benefits</li> <li>▪ Identify risks associated with the options/recommendations (of doing and not doing)</li> <li>▪ State the assumptions associated with the options/recommendations</li> <li>▪ Identify productivity improvements</li> <li>▪ Identify quantifiable (tangible) savings over a specified time period</li> <li>▪ Identify incremental revenue</li> <li>▪ Produce an ROI report written in business language</li> <li>▪ Proof read to confirm accuracy before presenting</li> </ul>

2 Management Competencies		
Topic	Competency	Range of Knowledge
5 Organizational Change Management	1 Describe the purpose of organizational change management	<p>The purpose of organizational change management is to adapt to changes in the organization's structure and direction in a coordinated and project-based manner. It comprises processes and procedures designed to manage change effectively, with minimized risk and interruption to customers and services.</p> <p>Changes could include:</p> <ul style="list-style-type: none"> <li>▪ New services</li> <li>▪ Mergers and acquisitions</li> <li>▪ Increased volumes of work</li> <li>▪ Cost cutting and operational rationalization</li> </ul>
	2 Identify the benefits of using an organizational change management process	<p>The benefits of using an organizational change management process include:</p> <ul style="list-style-type: none"> <li>▪ It improves the organization's performance</li> <li>▪ It manages risk</li> <li>▪ It involves stakeholders in developing plans and gains their buy-in to new plans</li> <li>▪ It reduces the adverse impact of changes</li> <li>▪ It assists with planning and optimizing resources</li> </ul>
	3 Identify key elements of organizational change management	<p>Key elements of organizational change management include:</p> <ul style="list-style-type: none"> <li>▪ Awareness and issue clarification</li> <li>▪ Business case development and planning</li> <li>▪ Operational planning</li> <li>▪ Structured communications – e.g. using RACI (responsible, accountable, consulted, informed)</li> <li>▪ Project management and governance</li> <li>▪ Implementation and review</li> <li>▪ Ensuring employee fairness and consistency</li> <li>▪ Complying with legal, financial and human resource requirements</li> <li>▪ Protecting and promoting industrial relations</li> </ul>
6 Project Management	1 List the elements required for successful project management	<p>The elements of successful project management include:</p> <ul style="list-style-type: none"> <li>▪ Time management</li> <li>▪ Project initiation and planning</li> <li>▪ Defining project objectives</li> <li>▪ Determining and documenting success criteria</li> <li>▪ Managing project risks</li> <li>▪ Managing costs</li> <li>▪ Identifying, controlling and managing the project stages/milestones</li> <li>▪ Managing resources</li> <li>▪ Achieving project deliverables</li> <li>▪ Good communication and expectation management</li> <li>▪ Closing the project</li> <li>▪ Reviewing the success of the project and the lessons learned</li> <li>▪ Ensuring a continual improvement focus</li> </ul>



2 Management Competencies		
Topic	Competency	Range of Knowledge
	2 Identify the characteristics of a successful project plan	<p>The characteristics of a successful project plan include:</p> <ul style="list-style-type: none"> <li>▪ Activities and resources are identified and coordinated for each phase of the project</li> <li>▪ Stakeholders are identified</li> <li>▪ There is clear and active sponsorship at senior level</li> <li>▪ A communication plan is defined</li> <li>▪ Milestones and deliverables are identified</li> <li>▪ Well defined roles and responsibilities</li> <li>▪ Costs are estimated and tracked</li> <li>▪ Time is allocated for resources to complete tasks appropriately</li> <li>▪ Project meetings and reviews are regularly scheduled</li> <li>▪ Quality is defined and reported on</li> <li>▪ The impact of dependencies is understood</li> <li>▪ Risk factors are identified and mitigated</li> <li>▪ The correct product or service is delivered to the customer</li> </ul>
7 Communication Skills	1 Identify the communication competencies required for the Service Desk and Support Manager to deliver on commitments	<p>To deliver on commitments successful Service Desk and Support Managers:</p> <ul style="list-style-type: none"> <li>▪ Communicate the service desk's goals, objectives and how they align with IT and the organization's objectives</li> <li>▪ Provide consistent and constructive feedback to their team/s</li> <li>▪ Emphasize the need for results, not just activity</li> <li>▪ Demonstrate confidence in their teams and match words with actions</li> <li>▪ Demonstrate to their team/s how progress is monitored, benchmarked, and corrected</li> <li>▪ Are able to say 'NO' where appropriate</li> <li>▪ Sell successes and highlight areas for improvement</li> <li>▪ Share the key management reports that show the ability of the service desk to meet goals and objectives</li> <li>▪ Work to include the service desk as a key component in the roll-out of new and upgraded systems – e.g. as part of release and deployment management</li> </ul>
	2 Identify appropriate channels of communication to use	<p>Appropriate channels of communication include:</p> <ul style="list-style-type: none"> <li>▪ Peer-group meetings</li> <li>▪ Target-group meetings</li> <li>▪ Mass meetings</li> <li>▪ E-mail</li> <li>▪ Phone</li> <li>▪ Social media</li> <li>▪ On-line journal or diary entries (e.g. Blogs)</li> </ul>
	3 Create a communication plan to coordinate all available channels of communication in order to improve the effectiveness of messages	<p>To create an effective communication plan:</p> <ul style="list-style-type: none"> <li>▪ Determine the timing and frequency of each message</li> <li>▪ Decide on the most effective channel to use for delivering the message</li> <li>▪ Adopt the simplest and most effective method to update the plan</li> </ul>

2 Management Competencies		
Topic	Competency	Range of Knowledge
	4 Identify the purpose of conducting meetings	<p>A meeting may be conducted for one or more of the following purposes:</p> <ul style="list-style-type: none"> <li>▪ Planning</li> <li>▪ Disseminating information i.e., briefing</li> <li>▪ Gathering information i.e., focus group, brainstorming sessions</li> <li>▪ Combination of above</li> <li>▪ Reviewing team performance and areas identified for improvement</li> <li>▪ One-to-one meetings</li> <li>▪ Disciplinary meetings</li> </ul>
	5 Describe methods used to conduct meetings	<p>Meetings may be conducted using one or more of the following options:</p> <ul style="list-style-type: none"> <li>▪ In person</li> <li>▪ Audio/telephone</li> <li>▪ Video</li> <li>▪ Electronic (e.g. Internet, Webcasts)</li> </ul>
	6 Identify the characteristics of a successful meeting	<p>The characteristics of a successful meeting include:</p> <ul style="list-style-type: none"> <li>▪ The meeting is scheduled with adequate notice to ensure that participants have sufficient time to prepare and that: <ul style="list-style-type: none"> <li>▪ a chairperson is appointed</li> <li>▪ an agenda is published</li> <li>▪ conformance to the agenda is managed by the chairperson</li> <li>▪ objectives are defined</li> <li>▪ participants, time and location are identified</li> <li>▪ expectations of participants are identified</li> <li>▪ it starts and stops on time</li> </ul> </li> <li>▪ All participants actively contribute</li> <li>▪ Meeting accomplishments, open items and assigned action items and deadlines are documented and published in a timely manner</li> <li>▪ The time constraints of participants are recognized</li> </ul>
	7 Explain how to prepare written communications	<p>When preparing a written communication:</p> <ul style="list-style-type: none"> <li>▪ Determine the purpose and audience</li> <li>▪ Identify and understand the objectives of the audience</li> <li>▪ Collect, organize and analyze data</li> <li>▪ Write concisely</li> <li>▪ Use appropriate language for the audience i.e. use business language that customers understand</li> </ul>

2 Management Competencies		
Topic	Competency	Range of Knowledge
	8 Identify requirements for preparing an effective presentation	<p>The requirements for preparing an effective presentation include:</p> <ul style="list-style-type: none"> <li>▪ Identifying the who, what, why, how, where and when of the presentation</li> <li>▪ Considering the needs of the audience - some people prefer words, others graphics</li> <li>▪ Using visual aids (e.g., typically slides, flip charts, acetates, electronic white boards.)</li> <li>▪ Provide supporting documentation if required</li> <li>▪ Understanding the three key stages of a presentation:               <ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Main body</li> <li>▪ Summary</li> </ul> </li> <li>▪ Ensuring that any visual aids (or written material) are summarized</li> <li>▪ Expressing key points clearly</li> <li>▪ Using terminology the audience will understand</li> <li>▪ Reviewing and practising the presentation in advance</li> <li>▪ Understanding cultural differences/knowing what techniques are appropriate for your audience</li> <li>▪ Planning how to obtain feedback</li> <li>▪ Being aware of body language</li> </ul>
	9 Identify considerations for developing a presentation	<p>Considerations for developing a presentation include:</p> <ul style="list-style-type: none"> <li>▪ The message and style of the presentation</li> <li>▪ Corporate styling and branding</li> <li>▪ The colour of the font and the background</li> <li>▪ The type and size of the font</li> <li>▪ The number of items and amount of text on each slide</li> <li>▪ The available time - tailor accordingly</li> <li>▪ The placement of slide projection equipment</li> </ul>
	10 Identify techniques for engaging the audience	<p>Techniques for engaging the audience include:</p> <ul style="list-style-type: none"> <li>▪ Ask questions designed to elicit verbal responses and participation from the audience</li> <li>▪ Give the audience a tangible vision of your ideas</li> <li>▪ Use real life experiences and anecdotes</li> <li>▪ Do not rely solely on slides</li> <li>▪ Use graphics and colours in presentations rather than lists and bullets of text</li> <li>▪ Use both open and closed questions where appropriate</li> </ul>

2 Management Competencies		
Topic	Competency	Range of Knowledge
8 Listening Skills	1 Describe the behaviours that demonstrate effective listening skills	<p>The behaviours that demonstrate effective listening skills are:</p> <ul style="list-style-type: none"> <li>▪ Face to face: <ul style="list-style-type: none"> <li>▪ Stop what you are doing and turn your body towards the person</li> <li>▪ Use eye contact (if appropriate for your culture)</li> <li>▪ Adopt a suitable posture</li> <li>▪ Paraphrase and question to verify understanding</li> <li>▪ Take notes to summarize information received and given but do not write constantly</li> </ul> </li> <li>▪ On the phone <ul style="list-style-type: none"> <li>▪ Make appropriate verbal responses</li> <li>▪ Question to clarify</li> <li>▪ Paraphrase to verify understanding</li> <li>▪ Avoid interrupting inappropriately</li> <li>▪ Focus on the person talking</li> <li>▪ Take notes to summarize information received and given but do not write constantly</li> </ul> </li> </ul>
9 Information Gathering Methods	1 Identify the differences between the three information gathering methods	<p>The three information gathering methods are:</p> <ul style="list-style-type: none"> <li>▪ One-way <ul style="list-style-type: none"> <li>▪ Customers provide information without being prompted by the service desk</li> <li>▪ Out-of-hours requests</li> <li>▪ Voice mail, e-mail, fax</li> </ul> </li> <li>▪ Structured <ul style="list-style-type: none"> <li>▪ Common, ordered and repetitive types of requests and issues</li> <li>▪ Pre-defined format and sequence (e.g. web or portal access using pre-defined entry forms)</li> </ul> </li> <li>▪ Unstructured <ul style="list-style-type: none"> <li>▪ Free-form questions are asked</li> </ul> </li> </ul>
10 Negotiation Skills	1 Describe the requirements for successful negotiation	<p>The requirements for successful negotiation include:</p> <ul style="list-style-type: none"> <li>▪ Seek a win-win solution - be willing to find a compromise that is acceptable to all parties</li> <li>▪ Determine the underlying need</li> <li>▪ Separate the person from the problem</li> <li>▪ Acknowledge the benefit of the other person's idea, from their perspective</li> <li>▪ Recognize that emotions exist and understand how to address them</li> <li>▪ Discuss each other's perceptions</li> <li>▪ Solicit participation from all parties</li> <li>▪ Set objective criteria to measure results</li> <li>▪ Recognize the different personality types, emotions and motivations of participants</li> </ul>

2 Management Competencies		
Topic	Competency	Range of Knowledge
	2 Demonstrate the characteristics of a good negotiator	<p>A good negotiator:</p> <ul style="list-style-type: none"> <li>▪ Develops well-planned and realistic commitments</li> <li>▪ Is prepared to present a strong case for their chosen position/argument</li> <li>▪ Is flexible and willing to change their position</li> <li>▪ Knows their limits / boundaries</li> <li>▪ Solves problems</li> <li>▪ Identifies multiple options to choose from</li> <li>▪ Explains concerns about each participant's ideas</li> <li>▪ Asks for examples and clarification when necessary</li> <li>▪ Focuses on requirements first, not how to get there</li> <li>▪ Strives to understand the differences from the all points of view</li> <li>▪ Does not blame anyone</li> <li>▪ Follows through on commitments and communicates issues and completions</li> <li>▪ Is viewed as a good listener</li> </ul>

3 Business Integration		
Topic	Competency	Range of Knowledge
1 Implementing Strategic Vision	1 Identify techniques for establishing effective relationships with other parts of the IT organization	<p>Techniques for establishing effective relationships with other parts of the IT organization include:</p> <ul style="list-style-type: none"> <li>▪ Communicate the goals, projects, and objectives of the service desk</li> <li>▪ Focus on how to achieve the objectives               <ul style="list-style-type: none"> <li>▪ Identify steps necessary to deliver on commitments</li> <li>▪ Focus on actions needed to meet the requirements for success</li> </ul> </li> <li>▪ Create a business case for all significant projects along with their critical success factors</li> <li>▪ Understand the roles and responsibilities of each team in meeting IT service and business objectives               <ul style="list-style-type: none"> <li>▪ Educate yourself and your team on the roles and responsibilities of the other teams</li> <li>▪ Educate other teams on the roles and responsibilities of your group</li> </ul> </li> <li>▪ Treat your colleagues in the IT organization as customers</li> <li>▪ Treat your service desk colleagues as you would like to be treated</li> <li>▪ Involve stakeholders and ensure that they see a value to their contribution - the 'what's in it for me' factor</li> <li>▪ Recognize the achievements of others</li> <li>▪ Establish regularly scheduled meetings between key service desk staff and key members of other teams</li> </ul>
	2 Identify how to use formal and informal networks to accomplish objectives	<p>To use formal and informal networks to accomplish objectives:</p> <ul style="list-style-type: none"> <li>▪ Ensure that actions which are liable to affect other departments such as economic and staffing ramifications for the organization are discussed with your manager or other knowledgeable managers before any action is taken</li> <li>▪ Identify who the key stakeholders are and obtain their buy-in to your recommendations</li> <li>▪ Understand the power of informal leaders and obtain their buy-in to your recommendations</li> <li>▪ Provide reports to demonstrate stakeholder contributions</li> </ul>
	3 Describe how to build effective working relationships	<p>To build effective working relationships and establish your credibility:</p> <ul style="list-style-type: none"> <li>▪ Meet your commitments</li> <li>▪ Do not commit to unrealistic targets to gain favour</li> <li>▪ Ensure that your commitments are clearly understood</li> <li>▪ Continually strive to improve your group</li> <li>▪ Ensure mutual respect for all teams and team members</li> <li>▪ Let others know that you respect their opinions</li> <li>▪ Have open communications with team members</li> <li>▪ Avoid hidden agendas</li> <li>▪ Actively listen to others</li> <li>▪ Demonstrate empathy - make certain that you understand others' concerns and issues</li> <li>▪ Be accountable for your actions</li> <li>▪ Take ownership</li> </ul>

3 Business Integration		
Topic	Competency	Range of Knowledge
	4 Identify the responsibilities of the Service Desk and Support Manager in contributing to IT and business objectives	<p>When contributing to IT and business objectives, the responsibilities of the Service Desk and Support Manager include:</p> <ul style="list-style-type: none"> <li>▪ Advising senior management about status, issues and any concerns about service desk matters</li> <li>▪ Providing suggestions on how to improve IT services</li> <li>▪ Ensuring that the service desk is represented on all design and service improvement initiatives</li> <li>▪ Gathering information, analyzing, and communicating results               <ul style="list-style-type: none"> <li>▪ to/from IT staff</li> <li>▪ to/from customers</li> </ul> </li> <li>▪ Participating in the organization's initiatives and cross-functional teams</li> <li>▪ Identifying initiatives that contribute to the success of the organization</li> </ul>
	5 Explain the value of conducting assessments	<p>Conducting an assessment is a necessary step in managing change and for continual improvement. It identifies the issues and opportunities to be used as the as the basis for change and development.</p> <p>Key types of assessment methods are:</p> <ul style="list-style-type: none"> <li>▪ SWOT – Strengths, weaknesses , opportunities threats</li> <li>▪ CSA – Current state analysis</li> <li>▪ Gap analysis – identify areas that do not meet current or future expectations</li> <li>▪ Benchmarking</li> </ul> <p>Outputs from assessments would include:</p> <ul style="list-style-type: none"> <li>▪ Business case/cost benefit analysis</li> <li>▪ Changes, programmes and projects</li> </ul>
2 Sourcing Models	1 Describe the various sourcing models available for the provision of consistent quality service	<p>The various sourcing model options available for the provision of consistent quality service include:</p> <ul style="list-style-type: none"> <li>▪ Internally resourced</li> <li>▪ Off-site outsourcing – services delivered by a 3rd party at their site</li> <li>▪ On-site outsourcing – services delivered by a 3rd party at the client's site</li> <li>▪ Insourcing               <ul style="list-style-type: none"> <li>▪ re-establishment of a service in-house following previous outsourcing</li> <li>▪ increasing the scope of the internal service desk</li> </ul> </li> <li>▪ Rightsourcing (multi-sourcing) – building an appropriate cost and quality service solution using a combination of in-house and external sourcing</li> <li>▪ On-shoring - Provision of services from a location within the country where the customer is based</li> <li>▪ Off-shoring – outsourcing to a geographically distant location in a different continent</li> <li>▪ Near-shoring – off-shoring to a geographically and culturally close country</li> </ul>

3 Business Integration		
Topic	Competency	Range of Knowledge
	2 Describe the outsourcing models used in a service desk environment	<p>The outsourcing models used in a service desk environment include:</p> <ul style="list-style-type: none"> <li>▪ Off-site outsourcing is contracting with a supplier to provide support services on the provider's premises that an organization might otherwise have employed its own staff to provide. The service could be delivered from an off-shore location that could be in close geographical proximity (near-shoring) or more geographically distant (far-shoring)</li> <li>▪ On-site outsourcing is when an organization contracts with another organization to provide support services on its own premises that it might otherwise have employed its own staff to provide</li> </ul>
	3 List the issues to consider when outsourcing	<p>Issues to consider when outsourcing include:</p> <ul style="list-style-type: none"> <li>▪ Cost and benefits expected</li> <li>▪ Cost of implementation</li> <li>▪ Cost of ongoing management</li> <li>▪ Cost of integration</li> <li>▪ The process supply chain</li> <li>▪ Impact on staff – teams and morale</li> <li>▪ Legal requirements</li> </ul>
	4 Explain the advantages of outsourcing	<p>The advantages of outsourcing include:</p> <ul style="list-style-type: none"> <li>▪ Focuses management resources on core competencies and the quality of the services provided</li> <li>▪ Eliminates day-to-day supervision of the outsourced group</li> <li>▪ Reduces capital expenditures and head-count; moves costs to operating expenses</li> <li>▪ Facilitates improved staffing flexibility</li> <li>▪ Defined and documented service levels, processes, procedures</li> <li>▪ Potentially delivers improved quality of customer service</li> <li>▪ Allows existing staff to focus on other initiatives</li> </ul>



3 Business Integration		
Topic	Competency	Range of Knowledge
	5 Explain the disadvantages of outsourcing	<p>The disadvantages of outsourcing include:</p> <ul style="list-style-type: none"> <li>▪ Resources are required to oversee the outsourcing relationship, contractual compliance and change management</li> <li>▪ Requires well defined, well documented procedures to be included in the contract</li> <li>▪ Ownership of Intellectual Property (IP) needs to be identified</li> <li>▪ Less direct control for day-to-day operations</li> <li>▪ Infrastructure efficiency may be impacted if costs are fixed</li> <li>▪ Outsourced staff may not be under the direct control of the host organization</li> <li>▪ Loss of informal contacts/information</li> <li>▪ Without sufficient integration, contractual agreements may inhibit previously available flexibility</li> <li>▪ The parties involved may use different, multiple service management and knowledge management systems without sufficient integration</li> <li>▪ Potential for higher cost if service supply chain is not adequately defined</li> <li>▪ Service consistency can suffer</li> <li>▪ Difficult to align to business and service desk mission and vision</li> <li>▪ Customer service may be affected due to communication issues or lack of advertising and promotion to customers</li> </ul>
	6 List issues to consider when insourcing	<p>Issues to consider when insourcing include:</p> <ul style="list-style-type: none"> <li>▪ Cost and benefits expected</li> <li>▪ Cost of implementation</li> <li>▪ Impact on internal resources and business as usual</li> </ul>
	7 Explain the service level management (SLM) considerations when outsourcing	<p>The service level management considerations required to successfully negotiate a contract with an outsourcer include:</p> <ul style="list-style-type: none"> <li>▪ Define, and agree underpinning contracts (UCs) with external suppliers</li> <li>▪ Explicitly state the accountabilities, roles and responsibilities of both the service provider and the customer</li> <li>▪ All related policies, processes and procedures</li> <li>▪ Interfaces between outsourcers, the customer and other partners</li> <li>▪ Performance levels (e.g. response times, resolve times, status updates) that support those in the SLA</li> <li>▪ The conflict resolution procedure</li> <li>▪ The frequency of reviews</li> <li>▪ The criteria for invoking any agreed penalty clauses and performance payments shall be clearly defined</li> <li>▪ Positive and negative service credits</li> </ul>

3 Business Integration		
Topic	Competency	Range of Knowledge
	8 Describe rightsourcing (multi-sourcing)	<p>Rightsourcing (multi-sourcing) means, identifying the proper balance of outsourcing and other sourcing options to ensure financial and operational effectiveness covering:</p> <ul style="list-style-type: none"> <li>▪ Facilities</li> <li>▪ Outsourced staff</li> <li>▪ Permanent staff</li> <li>▪ Contract staff</li> <li>▪ Temporary staff</li> </ul>
	9 Identify the benefits of rightsourcing	<p>The benefits of rightsourcing include:</p> <ul style="list-style-type: none"> <li>▪ It maintains operational control while enabling the utilization of effective external options</li> <li>▪ It provides an optimum mix of resources (outsourced, contract, temporary) that balances customer service quality with corporate Return on Investment (ROI)</li> </ul>
3 Promoting the Service Desk	1 Identify the objectives of promoting the service desk	<p>The objectives of promoting the service desk include:</p> <ul style="list-style-type: none"> <li>▪ Raising awareness of the service desk's contribution (value) in meeting business goals to customers and the organization</li> <li>▪ Improving the service desk's strategic position and business influence</li> <li>▪ Communicating the mission</li> <li>▪ Communicating the available IT services</li> <li>▪ Managing customer expectations</li> <li>▪ Increasing the visibility of the service desk</li> <li>▪ Improving customer satisfaction</li> <li>▪ Increasing customer loyalty</li> <li>▪ Clarifying customer responsibilities and benefits</li> <li>▪ Increasing the perception of the service desk's credibility and professionalism</li> <li>▪ Improving morale (service desk staff feel more valued)</li> </ul>

3 Business Integration		
Topic	Competency	Range of Knowledge
	2 Give examples of channels available for promoting the service desk	<p>Examples of channels available for promoting the service desk include:</p> <ul style="list-style-type: none"> <li>▪ IT services scorecard/dashboard that identify the service desk's performance i.e.               <ul style="list-style-type: none"> <li>▪ Customer satisfaction</li> <li>▪ SLM measurements</li> </ul> </li> <li>▪ Organization or service desk newsletter</li> <li>▪ 'Lunch and learn' sessions</li> <li>▪ Shadowing</li> <li>▪ Spending time in different areas of the business</li> <li>▪ Social media</li> <li>▪ Meet with customers (one-on-one) and ask them what they need</li> <li>▪ Set up a booth at organization/customer meetings in key areas like the cafeteria (i.e., in-person promotion)</li> <li>▪ Distribute flyers containing service desk information and FAQs</li> <li>▪ Promote the service desk via your organization's and/or service desk's Intranet</li> <li>▪ Hold an 'Open House' - let your customers meet the people who solve their incidents and service requests</li> <li>▪ Organize 'Road Shows' - go to your customers</li> <li>▪ Schedule times for service desk staff to walk the floor in key customer areas</li> <li>▪ Induction sessions for new starters and new applications</li> </ul>
	3 Identify key activities to be undertaken when planning a promotion programme	<p>The key activities to be undertaken when planning a successful promotion programme include:</p> <ul style="list-style-type: none"> <li>▪ Clearly define the objectives and messages to be communicated</li> <li>▪ Identify the target audience and communicate using the appropriate channel</li> <li>▪ Consider budget and resource requirements</li> <li>▪ Consider whether there are multiple, specific, targeted communications or one communication for all audiences</li> <li>▪ Obtain feedback to verify that the message was delivered and understood</li> <li>▪ Understand the communications requirements within the organization</li> <li>▪ Plan appropriately for regularly scheduled and ongoing communication</li> </ul>
	4 Explain how to manage stakeholder expectations	<p>Manage stakeholder expectations by:</p> <ul style="list-style-type: none"> <li>▪ Evaluating current levels of performance and soliciting feedback</li> <li>▪ Creating a service catalogue with service offerings clearly defined</li> <li>▪ Defining service levels that balance resources and capability with business requirements</li> <li>▪ Offering multiple channels to provide information about the service desk - what do customers expect?</li> <li>▪ Surveying customers frequently to determine their needs</li> <li>▪ Linking service desk KPIs with business objectives and KPIs</li> </ul>

4 Operational Management		
Topic	Competency	Range of Knowledge
1 Information Technology Service Management (ITSM)	1 Describe IT service management and explain its objectives	<p>ITSM is the implementation and management of quality IT services that meet the needs of the business. IT service management is performed by IT service providers through an appropriate mix of people, process and information technology.</p> <p>The objectives of ITSM include:</p> <ul style="list-style-type: none"> <li>▪ Creating, designing, delivering, managing and optimizing IT business services from beginning to end (service life-cycle)</li> <li>▪ Integration with business process</li> <li>▪ Cost reduction and resource optimization</li> <li>▪ Increased IT infrastructure and service reliability</li> <li>▪ Investment protection and risk reduction</li> <li>▪ Improved customer experience and communication</li> <li>▪ Increased business value and visibility of the service provider</li> </ul>
	2 Describe ITIL®	<p>ITIL® is a worldwide IT service management best practice and offers guidance for the design, planning, delivery and management of IT services and support infrastructure from beginning to end. It aligns with and underpins ISO/IEC 20000 the worldwide standard comprising:</p> <ul style="list-style-type: none"> <li>▪ Service Strategy</li> <li>▪ Service Design</li> <li>▪ Service Transition</li> <li>▪ Service Operation</li> <li>▪ Continual Service Improvement</li> </ul>
2 Incident Management	1 Describe the responsibility and objectives of the incident management process	<p>The incident management process is responsible for managing the life-cycle of all incidents.</p> <p>The primary objectives of incident management are:</p> <ul style="list-style-type: none"> <li>▪ To restore normal service operations as quickly as possible</li> <li>▪ To minimize the adverse impact on business operations</li> <li>▪ To ensure the best possible levels of service quality and availability are maintained</li> </ul>
	2 Explain the service desk's responsibilities in and its relationship with the incident management process	<p>The service desk sits at the centre of the incident management process and is responsible for:</p> <ul style="list-style-type: none"> <li>▪ Providing a single point of contact (SPOC) for support</li> <li>▪ Ownership of incidents</li> <li>▪ Resolving as many incidents as possible at the first point of contact</li> <li>▪ Escalating incidents to other groups as stated in the service level agreement or operational level agreement</li> <li>▪ Facilitating a fast incident resolution</li> <li>▪ Tracking, monitoring and chasing incident progress</li> <li>▪ Providing positive and timely incident updates and communications to customers</li> <li>▪ Providing information and updates on service performance</li> <li>▪ Providing data for the problem management process</li> </ul>

4 Operational Management		
Topic	Competency	Range of Knowledge
	3 Describe the principal activities of the incident management process	<p>The principal activities of the incident management process are:</p> <ul style="list-style-type: none"> <li>▪ Incident identification</li> <li>▪ Recording and documenting incidents (logging)</li> <li>▪ Incident categorization</li> <li>▪ Incident prioritization (impact and urgency)</li> <li>▪ Initial diagnosis</li> <li>▪ Incident matching</li> <li>▪ Investigation and diagnosis</li> <li>▪ Escalation</li> <li>▪ Incident resolution and recovery</li> <li>▪ Owning and monitoring incidents until they are closed</li> <li>▪ Communication</li> <li>▪ Closing incidents</li> <li>▪ Incident tracking and reporting</li> </ul>
	4 Explain the benefits of the incident management process	<p>The benefits of the incident management process include:</p> <ul style="list-style-type: none"> <li>▪ It reduces the impact of incidents on the business</li> <li>▪ It improves staff utilization</li> <li>▪ It improves resolution times (reduces down-time)</li> <li>▪ It gives consistency to the categorization and prioritization of incidents</li> <li>▪ It provides a system wide view of incidents encountered</li> <li>▪ It manages an incident from beginning to end</li> <li>▪ It is an information source for identifying points of failure</li> <li>▪ It facilitates proactive communication</li> <li>▪ It is an information source for helping to prevent future incidents</li> <li>▪ It facilitates continual service improvement</li> <li>▪ It assists in the provision of accurate management information</li> <li>▪ It assists in the identification of incident trends and work-flows</li> </ul>
3 Request Fulfilment	1 Describe the responsibility and objectives of request fulfilment	<p>Request fulfilment is the process responsible for managing the life-cycle of all service requests.</p> <p>The objectives of request fulfilment are:</p> <ul style="list-style-type: none"> <li>▪ To provide a channel for customers to request and receive standard services for which a pre-defined approval and qualification process exists</li> <li>▪ To provide information to customers about the availability of services and the procedure for obtaining them</li> <li>▪ To source and deliver the components of requested standard services (e.g. licences and software media)</li> <li>▪ To assist with general information, complaints or comments</li> </ul>

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Topic	Competency	Range of Knowledge
	2 Explain the purpose of a service request	A service request is a formal request from a customer for something to be provided; for example a request for information or advice, to reset a password, to install a workstation for a new user, for a standard change, or for access to an IT service. Service requests are managed by the request fulfilment process, usually in conjunction with the service desk. All service requests are subject to change management and are usually pre-authorized.
4 Problem Management	1 Describe the responsibility and objectives of the problem management process	<p>Problem management is the process responsible for managing problems throughout their life-cycle.</p> <p>The primary objectives of problem management are:</p> <ul style="list-style-type: none"> <li>▪ To minimize the adverse impact of incidents and problems on the business caused by errors within the IT Infrastructure</li> <li>▪ To prevent the recurrence of incidents related to these errors</li> <li>▪ To minimize the impact of incidents that cannot be prevented</li> <li>▪ To determine the root cause of incidents and then initiate actions to improve or correct the situation</li> </ul>
	2 Explain the service desk's responsibilities in and its relationship with the problem management process	<p>The service desk is not usually responsible for problem management. Its responsibilities are to:</p> <ul style="list-style-type: none"> <li>▪ Highlight recurring incident to problem management</li> <li>▪ Work with technical teams to diagnose problems when appropriate</li> <li>▪ Ensure incidents are logged correctly and that all appropriate information from the customer, and the steps taken so far, are recorded accurately</li> <li>▪ Uses knowledge base entries (workarounds) for fast resolution of recurring or routine incidents</li> </ul>
	3 Describe reactive and proactive problem management in relation to the service desk	<p>In relation to the service desk, reactive and proactive problem management is described as:</p> <ul style="list-style-type: none"> <li>▪ Reactive problem management is concerned with solving problems in response to one or more incidents.</li> <li>▪ The objective of proactive problem management is to identify underlying problems that might otherwise be missed. Proactive problem management analyzes incident records and uses data collected by other IT service management processes to identify trends or significant problems.</li> </ul>
	4 Explain the benefits of the problem management process	<p>The benefits of the problem management process include:</p> <ul style="list-style-type: none"> <li>▪ It optimizes the quality of IT services</li> <li>▪ It increases the availability of IT services</li> <li>▪ It reduces down-time</li> <li>▪ It enhances the reputation of IT</li> <li>▪ It reduces the volume of incidents</li> <li>▪ It improves productivity of the business and IT</li> <li>▪ It reduces time to resolve incidents</li> <li>▪ It increases first contact resolutions</li> <li>▪ The IT support mind-set moves from error correction to service enhancement (from a reactive to a proactive attitude)</li> </ul>

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Topic	Competency	Range of Knowledge
5 IT Change Management	1 Describe the responsibility and objectives of the IT change management process	<p>IT change management is the process responsible for managing changes throughout their life-cycle.</p> <p>The primary objectives of the IT change management process are:</p> <ul style="list-style-type: none"> <li>▪ To enable beneficial, approved changes to be made, with minimum disruption to IT services</li> <li>▪ To control changes to the infrastructure and all IT services</li> <li>▪ To create and maintain a change schedule</li> <li>▪ To ensure changes to IT services and infrastructure are tested, planned, scheduled, coordinated and communicated</li> <li>▪ To identify what resources are required, when, the cost, the risk and the impact</li> </ul>
	2 Explain the service desk's responsibilities in the IT change management process	<p>The service desk's responsibilities in the IT change management process are:</p> <ul style="list-style-type: none"> <li>▪ To log changes as requested</li> <li>▪ To participate in the assessment of risk as requested</li> <li>▪ To be aware of what changes are scheduled in order to identify if they may be the cause of incidents or problems</li> <li>▪ To escalate incidents that may be caused by changes appropriately</li> <li>▪ To communicate planned system downtime and interruptions to customers</li> </ul>
	3 Explain the benefits of IT change management to the service desk	<p>The benefits of the IT change management process include:</p> <ul style="list-style-type: none"> <li>▪ Improves the stability and availability of services and systems by reducing the number of failed changes</li> <li>▪ Protects the business environment by minimizing disruption</li> <li>▪ Prevents unauthorized changes from being made</li> <li>▪ Increases the visibility and communication of change</li> </ul>
6 Release and Deployment Management	1 Describe the responsibilities and primary objectives of the release and deployment management process	<p>Release and deployment management is the process responsible for:</p> <ul style="list-style-type: none"> <li>▪ The successful roll-out of new or changed services, hardware, software, related documentation or process, that may affect the delivery of underpinning IT services to the business and its customers safely and with minimum risk</li> <li>▪ Early life support</li> </ul> <p>The primary objectives of release and deployment management are to:</p> <ul style="list-style-type: none"> <li>▪ Ensure that the hardware, software or service being changed is traceable and secure, and that only correct, authorized and tested versions are installed</li> <li>▪ Agree the exact content and plan for the release, through liaison with change management</li> <li>▪ Ensure that the service desk is involved in the roll-out plan so that it can provide appropriate support for new releases</li> </ul>

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Topic	Competency	Range of Knowledge
	2 Explain the service desk's responsibilities in the release and deployment management process	<p>The service desk's responsibilities in the release and deployment management process are:</p> <ul style="list-style-type: none"> <li>▪ To work with development teams to ensure that the service can be properly supported at and beyond launch</li> <li>▪ To support the launch process with flexible levels of support as needed</li> <li>▪ To provide suitable formats and templates to ensure that information is provided in an appropriate form for service desk support</li> <li>▪ Participate in customer communication and expectation management during roll-outs</li> </ul>
	3 Explain the primary benefits of the release and deployment management process	<p>The primary benefits of release and deployment management are:</p> <ul style="list-style-type: none"> <li>▪ Increased success rate in the release of applications and improved quality of service delivered to the business</li> <li>▪ Minimized disruption of service to the business</li> <li>▪ Minimized regression-testing requirements</li> <li>▪ Robust system implementation reduces the support burden on the service desk</li> <li>▪ An audit trail of released service is maintained</li> </ul>
7 Service Asset and Configuration Management (SACM)	1 Describe the responsibilities and primary objectives of the service asset and configuration management process	<p>The responsibilities of service asset and configuration management are to ensure that:</p> <ul style="list-style-type: none"> <li>▪ The assets required to deliver services are properly controlled</li> <li>▪ Accurate and reliable information about those assets is available when and where it is needed to enable people to make decisions at the right time</li> </ul> <p>The primary objectives of service asset and configuration management are to:</p> <ul style="list-style-type: none"> <li>▪ Account for, manage and protect the integrity of configuration items throughout the service life-cycle</li> <li>▪ Work with change management to ensure that only authorized components are used and only authorized changes are made</li> <li>▪ Minimise the number of quality and compliance issues caused by incorrect or inaccurate configuration of services and assets</li> <li>▪ Maintain accurate configuration information on the historical, planned and current state of the services and infrastructure</li> </ul>
	2 Explain the service desk's responsibilities in the service asset and configuration management process	<p>The service desk's responsibilities in the service asset and configuration management process are to:</p> <ul style="list-style-type: none"> <li>▪ Use the information contained in the configuration management system to aid fast and accurate incident logging</li> <li>▪ Update configuration information to support accurate incident diagnosis</li> <li>▪ Notify the person responsible for the SACM process of any discrepancies based on information received during incident logging so that a permanent change can be made</li> </ul>



4 Operational Management		
Topic	Competency	Range of Knowledge
	3 Explain the primary benefits of the service asset and configuration management process	<p>The primary benefits of the service asset and configuration management process are that:</p> <ul style="list-style-type: none"> <li>▪ Services, assets, resources and processes are properly managed and maintained (what, where, who, how many and how much)</li> <li>▪ Relationships and dependencies between physical assets, components, software and services within an organization are maintained to produce an intelligent, integrated inventory</li> </ul>
8 Knowledge Management	1 Describe the responsibility and primary objectives of the knowledge management process	<p>Knowledge management is the process responsible for gathering, analysing, storing and sharing knowledge and information within an organization.</p> <p>The primary objectives of knowledge management are to:</p> <ul style="list-style-type: none"> <li>▪ Improve efficiency by reducing the need to rediscover knowledge</li> <li>▪ Generate value from its intellectual and knowledge-based assets</li> </ul> <p>Generally intellectual and knowledge-based assets fall into one of two categories: explicit or tacit.</p> <ul style="list-style-type: none"> <li>▪ <b>Explicit</b> - includes assets such as business plans, policies, processes, procedures, solutions and customer advice, research material or anything that can be documented, archived or codified</li> <li>▪ <b>Tacit</b> - is the know-how contained in people's heads</li> </ul>
	2 Explain the service desk's responsibilities in the knowledge management process	<p>The service desk's responsibilities in the knowledge management process are:</p> <ul style="list-style-type: none"> <li>▪ To use all information and resolution data available to effect a high first contact resolution rate for customers</li> <li>▪ To feedback on the relative value of knowledge items and other available information</li> <li>▪ To provide templates for the optimum format and level of information needed for first time fixes</li> <li>▪ To lead by example and encourage wider use of knowledge management</li> </ul>
	3 Describe what constitutes a knowledge base	<p>A knowledge base comprises a set of tools and databases that are used to manage, update and present the knowledge and information that an IT service provider needs to manage the full life-cycle of IT services.</p>

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Topic	Competency	Range of Knowledge
	4 Explain the benefits of a knowledge base	<p>The benefits of a knowledge base include:</p> <ul style="list-style-type: none"> <li>▪ Enables service desk staff and customers to work more effectively and efficiently</li> <li>▪ Reduces training time for new staff</li> <li>▪ Helps to provide a more professional view to the business giving customers confidence in the capability of the desk</li> <li>▪ Solves a problem once and uses the solution many times</li> <li>▪ Allows for incremental solution building</li> <li>▪ Builds rapport and establishes credibility between the various teams in the service desk by sharing knowledge</li> <li>▪ Facilitates more effective support processes</li> <li>▪ Reduces costs for the organization</li> <li>▪ Ensures that knowledge is consistent and complete</li> <li>▪ Reduces the number of escalated incidents</li> </ul>
	5 List the steps required to develop and maintain a knowledge base	<p>The steps required to develop and maintain a knowledge base include:</p> <ul style="list-style-type: none"> <li>▪ Define templates and layouts for knowledge articles in order to optimize the speed with which an article can be reviewed during a call</li> <li>▪ Capture tacit knowledge</li> <li>▪ Review and evaluate information and solutions to improve accuracy and ensure conformity to standards</li> <li>▪ Store information in a structured, centralized repository</li> <li>▪ Ensure content is searchable</li> <li>▪ Make the content available to customers when and where they need it</li> </ul>
9 Information Security and Access Management	1 Describe the responsibility and primary objectives of the information security and access management processes	<p>Information security management is the process responsible for ensuring the confidentiality, integrity and availability of an organization's assets, information, data and IT services. It forms part of the organization's overarching security management process which includes areas such as access to data, buildings and telephone calls for the entire organization.</p> <p>Access management is the process responsible for the operational actioning of the policies defined in information security management.</p> <p>The primary objectives of information security and access management include:</p> <ul style="list-style-type: none"> <li>▪ Reducing and minimizing business risk</li> <li>▪ Ensuring IT service continuity for the business</li> <li>▪ Meeting security requirements as defined in the SLA</li> <li>▪ Meeting requirements for security drawn from underpinning contracts, legislation, and imposed security policies</li> <li>▪ Maintaining regulatory and compliance evidence</li> <li>▪ Providing basic data security to the organization</li> <li>▪ Ensuring IT operates adequate and proportionate (i.e. cost effective) security controls</li> </ul>

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Topic	Competency	Range of Knowledge
	2 Explain the service desk's responsibilities in the information security and access management process	<p>The service desk's responsibilities in the information security and access management process are to:</p> <ul style="list-style-type: none"> <li>▪ Confirm identification of customers</li> <li>▪ Provide fast resolution to access incidents as appropriate</li> <li>▪ Follow all relevant IT security policies</li> <li>▪ Ensure that good and consistent advice on the proper use of security and IT policies is given</li> <li>▪ Quickly escalate any issues where security may be compromised</li> </ul>
	3 Explain the benefits of the information security and access management process	<p>The benefits of the information security and access management process include:</p> <ul style="list-style-type: none"> <li>▪ A clear and unambiguous security policy is available for everyone to follow</li> <li>▪ Personal and organizational data is protected</li> <li>▪ The risk of physical security breaches is minimized</li> <li>▪ The business has an appreciation of the resources and costs required to ensure the security of information, thus enabling a better understanding of the risks and vulnerabilities</li> </ul>
10 IT Service Continuity Management	1 Describe the responsibility and objectives of the IT service continuity management process	<p>The IT service continuity management (ITSCM) process is responsible for managing risks that could seriously impact IT services. ITSCM ensures that the IT service provider can always deliver the required minimum agreed service levels, by reducing the risk to an acceptable level and by planning for the recovery of IT services.</p> <p>The primary objectives of IT service continuity management are to:</p> <ul style="list-style-type: none"> <li>▪ Maintain critical customer services with minimal disruptions</li> <li>▪ Eliminate single points of failure for delivering services</li> <li>▪ Provide both short and long-term continuity options</li> <li>▪ Plan for and maintain infrastructure resources that are critical to the survival of the business</li> </ul> <p>The overall business continuity management process is supported by the ITCM process.</p>
	2 Explain the service desk's responsibilities in the IT service continuity management process	<p>The service desk's responsibilities in the IT service continuity management process are to:</p> <ul style="list-style-type: none"> <li>▪ Participate in the development of a business continuity plan</li> <li>▪ Assist in developing a service desk disaster recovery plan/backup site in order to provide support post emergency</li> <li>▪ Provide support to disaster recovery testing</li> <li>▪ Encourage IT groups to contribute resolutions to the service desk in order to reduce single-point-of-failure issues</li> </ul>

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Topic	Competency	Range of Knowledge
	3 Explain the benefits of the IT service continuity management process	<p>The benefits of IT service continuity management include:</p> <ul style="list-style-type: none"> <li>▪ Improved management of risks</li> <li>▪ Decrease in potential lost revenue</li> <li>▪ Potential lower insurance premiums</li> <li>▪ Meeting regulatory requirements (for some industries)</li> <li>▪ Effective recovery of business services and systems following a major outage or disaster</li> </ul>
11 Service Catalogue Management	1 Describe the responsibilities of the service catalogue management process	<p>The responsibilities of the service catalogue management process are to:</p> <ul style="list-style-type: none"> <li>▪ Manage the information contained within the service catalogue</li> <li>▪ Ensure the service catalogue is accurate</li> <li>▪ Ensure that the service catalogue is made available to those approved to access it</li> <li>▪ Ensure that the service catalogue supports the evolving needs of all other service management processes</li> </ul>
	2 Explain the service desk's responsibilities in the service catalogue management process	<p>The service desk's responsibilities in the service catalogue management process are to communicate:</p> <ul style="list-style-type: none"> <li>▪ What the service provider can do for the customer</li> <li>▪ How to interact with the service provider</li> <li>▪ How to place service requests</li> <li>▪ The cost of the service</li> <li>▪ How to gain access to service information</li> <li>▪ How supporting services underpin business capability</li> <li>▪ The impact of service failures</li> </ul>
	3 Explain the benefits of the service catalogue management process	<p>The benefits of the service catalogue management process are:</p> <ul style="list-style-type: none"> <li>▪ The service desk is able to use the service catalogue as a marketing and communication tool</li> <li>▪ Common understanding of IT services is ensured</li> <li>▪ Improved relationships between the customer and service provider</li> <li>▪ Improved service provider focus on customer outcomes by correlating internal service provider activities to business processes and outcomes</li> <li>▪ Improved knowledge, alignment and focus on the 'business value' of each service throughout the service provider's organization and its activities</li> </ul>
	4 Describe the key structural elements of the service catalogue	<p>The service catalogue has two views:</p> <ul style="list-style-type: none"> <li>▪ The business/customer view - contains details of all the services delivered to customers (customer-facing services), together with relationships to the business units and the business processes that rely on the IT services</li> <li>▪ The technical/supporting view - contains details of all supporting IT services together with their relationships to the customer-facing services they underpin and the components, configuration items and other supporting services that are necessary to support the provision of the services to customers</li> </ul>

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Topic	Competency	Range of Knowledge
12 Service Level Management	1 Describe the responsibility and objectives of the service level management process	<p>Service level management (SLM) is an approach for optimizing and providing cost effective delivery and support of IT services aligned to business requirements.</p> <p>The primary objectives of SLM are:</p> <ul style="list-style-type: none"> <li>▪ To ensure that all IT service management processes, service level agreements, operational level agreements and underpinning contracts are appropriate for the agreed service level targets</li> <li>▪ To negotiate service level agreements (SLAs) and operational level agreements (OLAs)</li> <li>▪ Link with supplier management to ensure that underpinning contracts support the agreed service level targets defined in the SLA</li> <li>▪ Define, document, agree, monitor, measure, report and review the level of IT services provided</li> <li>▪ To hold regular customer reviews</li> </ul>
	2 Explain the service desk's responsibilities in the service level management process	<p>The service desk's responsibilities in the service level management process are:</p> <ul style="list-style-type: none"> <li>▪ To deliver services in accordance with agreed service level agreements (SLAs)</li> <li>▪ To encourage and support other IT areas to observe and follow the requirements of service level agreements (SLAs) and operational level agreements (OLAs) and the service deliverables agreed in underpinning contracts</li> <li>▪ To review performance and identify areas of improvement</li> <li>▪ To participate in the service reporting process</li> </ul>
	3 List the principal components of the service level management process	<p>The principal components of the service level management process are:</p> <ul style="list-style-type: none"> <li>▪ Service level requirements (SLR)</li> <li>▪ Service catalogue (SC)</li> <li>▪ Service improvement programme (SIP)</li> <li>▪ Service level agreements (SLAs)</li> <li>▪ Operational level agreements (OLAs)</li> <li>▪ Underpinning contracts (UCs)</li> <li>▪ Service level contract (SLC)</li> <li>▪ Service level reviews and reporting</li> </ul> <p>Note: The above components and requirements are ideally identified and defined when new operational IT services are designed.</p>

4 Operational Management		
Topic	Competency	Range of Knowledge
	4 List the principal activities of service level management (SLM)	<p>The principal activities of the service level management process are:</p> <ul style="list-style-type: none"> <li>▪ Design service level agreement (SLA) frameworks</li> <li>▪ Determine, document and agree service level requirements</li> <li>▪ Scope, review and revise operational level agreements (OLAs) and underpinning contracts (UCs)</li> <li>▪ Negotiate, agree and document service level agreements (SLAs)</li> <li>▪ Monitor services against service level agreements (SLAs)</li> <li>▪ Measure and improve customer satisfaction</li> <li>▪ Produce service reports</li> <li>▪ Conduct service reviews and instigate improvements</li> <li>▪ Develop contacts and relationships</li> <li>▪ Handle complaints and compliments</li> </ul>
	5 Explain the purpose of a service level agreement (SLA)	<p>The purpose of a service level agreement (SLA) is to document the service targets agreed between the customer and the service provider in order to ensure that both parties understand their responsibilities. A service level agreement is not a legally binding contract but may form part of a service deliverables schedule attached to an underpinning contract.</p>
	6 List the typical content of a service level agreement	<p>Typical content of a service level agreement include:</p> <ul style="list-style-type: none"> <li>▪ The types and quality of services provided</li> <li>▪ The level of services (e.g. response time and hours of operation)</li> <li>▪ Maintenance schedules for IT services</li> <li>▪ Charging/costs for IT services</li> <li>▪ The methods used for measuring and reporting compliance with the agreement</li> <li>▪ The process for dealing with conflict between the customer and the service provider</li> <li>▪ The period between agreed formal SLA reviews</li> </ul>
	7 Describe the purpose of an operational level agreement (OLA)	<p>An operational level agreement (OLA) is a documented agreement between internal service providers that define the responsibilities, roles and the expectations of each team necessary to meet a service level agreement (SLA).</p>
	8 Describe the purpose of an underpinning contract (UC)	<p>Underpinning contracts (UCs) are legally defined and binding contractual agreements made with external suppliers who provide elements of the IT support service. The negotiation of underpinning contracts (UCs) would typically be carried out in conjunction with supplier management.</p>

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Topic	Competency	Range of Knowledge
	9 Explain the benefits of implementing a service level management process	<p>The benefits of implementing a service level management process include:</p> <ul style="list-style-type: none"> <li>▪ The customer knows and agrees the priorities and costs (quantity/quality balance)</li> <li>▪ Sets the expectations of the customer and service provider in order to minimize conflicts, build trust and improve satisfaction</li> <li>▪ Increased customer loyalty</li> <li>▪ Improves the relationship between the customer and IT service provider</li> <li>▪ IT success metrics are defined and measured</li> <li>▪ Allows for proactive planning</li> <li>▪ Customers buy-in to the plan</li> <li>▪ IT can prioritize and plan resources to meet specific customer needs</li> </ul>
13 Quality Assurance Programmes	1 Describe the purpose and objectives of a quality assurance (QA) programme	<p>The purpose of a quality assurance programme is to develop and maintain appropriate improvements in the quality of services provided.</p> <p>The objectives are:</p> <ul style="list-style-type: none"> <li>▪ To document ongoing IT service quality programmes</li> <li>▪ To agree the quality initiatives used as part of IT service delivery with customers</li> <li>▪ To continually improve the quality and cost effectiveness of IT services</li> <li>▪ To address IT service performance that is not meeting expectations</li> <li>▪ To produce options and recommendations for improvement and to implement and review them</li> </ul>
	2 Identify common quality assurance practices	<p>Common quality assurance practices include:</p> <ul style="list-style-type: none"> <li>▪ Customer feedback</li> <li>▪ Benchmarking</li> <li>▪ Incident monitoring</li> <li>▪ Call monitoring</li> <li>▪ Interaction monitoring</li> <li>▪ Employee surveys</li> <li>▪ E-mail/Chat monitoring</li> <li>▪ KPI monitoring</li> <li>▪ Round tables</li> <li>▪ Focus groups</li> <li>▪ Skill testing</li> <li>▪ Account management reviews</li> <li>▪ Coaching</li> <li>▪ Mentoring</li> <li>▪ Regular mystery shopping</li> <li>▪ One-to-ones</li> </ul>
	3 Identify the purpose of obtaining and recording customer feedback	<p>The purpose of obtaining and recording feedback is to understand the customer's perception of the IT organization's products and services and to address any negative issues identified so that customer confidence is restored.</p>

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Topic	Competency	Range of Knowledge
	4 Identify the various opportunities for obtaining positive and negative feedback	<p>The opportunities for obtaining customer feedback are:</p> <ul style="list-style-type: none"> <li>▪ Customer complaints</li> <li>▪ Customer surveys</li> <li>▪ Compliments</li> <li>▪ Suggestions</li> <li>▪ Account management /service review meetings</li> <li>▪ Round tables</li> <li>▪ Focus groups</li> <li>▪ Floor walking</li> <li>▪ Social media</li> <li>▪ Service desk participation in organization initiatives</li> <li>▪ Exchange visits</li> </ul>
	5 Describe the procedure for responding to feedback	<p>The procedure for responding to feedback is:</p> <ul style="list-style-type: none"> <li>▪ Record</li> <li>▪ Assign ownership</li> <li>▪ Identify action required</li> <li>▪ Take appropriate action</li> <li>▪ Trend and report</li> </ul>
	6 Describe the purpose and objectives of conducting customer satisfaction surveys	<p>The purpose of conducting customer satisfaction surveys is to determine customer perception of the products and services the IT organization and the service desk deliver, and to determine whether they are meeting customer expectations.</p> <p>The objectives are to:</p> <ul style="list-style-type: none"> <li>▪ Identify what customers feel is important</li> <li>▪ Identify and prioritize areas for improvement</li> <li>▪ Baseline and trend customer satisfaction</li> <li>▪ Assist in developing new products and services based on customer needs</li> <li>▪ Validate the effect of service improvements</li> </ul>
	7 List the common types of customer satisfaction surveys conducted by the service desk	<p>The common types of customer satisfaction surveys conducted by the service desk are:</p> <ul style="list-style-type: none"> <li>▪ Ongoing (event based)</li> <li>▪ Annual or periodic</li> <li>▪ One-time or one-off</li> <li>▪ Weighted surveys</li> </ul>
	8 Describe an ongoing or event survey	<p>Ongoing or event based surveys:</p> <ul style="list-style-type: none"> <li>▪ Are executed as soon as possible after a call is closed</li> <li>▪ Are typically short and can be completed quickly</li> <li>▪ Measure the quality of a single call or incident</li> <li>▪ Are used to trend customer satisfaction between annual surveys</li> <li>▪ Measure the impact of changes in processes, products, or services</li> <li>▪ Have delivery options designed not to over survey the customer base <ul style="list-style-type: none"> <li>▪ Random</li> <li>▪ Percentage selection</li> <li>▪ All calls</li> </ul> </li> </ul>



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Topic	Competency	Range of Knowledge
	9 Describe an annual or periodic survey	<p>Annual or periodic surveys:</p> <ul style="list-style-type: none"> <li>▪ Are planned and scheduled on a periodic basis (at least annually)</li> <li>▪ Are typically longer than event based</li> <li>▪ Are used to evaluate overall satisfaction levels with the products and services provided by the service desk and the IT organization</li> <li>▪ Identify changes to products, services, and processes that customers feel would improve their relationship with the service desk and the IT organization and better meet their needs</li> <li>▪ Are based on customer perception of the service desk and the IT organization over the last year or period</li> </ul>
	10 Describe a one-time or one-off survey	<p>One-time or one-off surveys:</p> <ul style="list-style-type: none"> <li>▪ Are not completed at regularly scheduled intervals</li> <li>▪ Are scheduled for specific reasons</li> <li>▪ Are appropriate for evaluating satisfaction levels with current product and service offerings or for identifying changes that customers feel are important</li> </ul>
	11 Describe a weighted survey	A weighted survey determines customer perception and the importance of the experience described
	12 Describe the role of benchmarking in a service desk environment	<p>The role of benchmarking in a service desk environment:</p> <ul style="list-style-type: none"> <li>▪ It provides an understanding of the relative differences and similarities between participating service desks in order to acquire a comparative evaluation of service desk performance</li> <li>▪ It is used to provide meaningful and readily implemented improvement recommendations</li> </ul>
	13 Recognize the issues to be considered when benchmarking	<p>Issues to be considered when benchmarking include:</p> <ul style="list-style-type: none"> <li>▪ Benchmarking is completed using collaborative methodologies and robust metrics that enable consistent data collection and true peer group comparisons.</li> <li>▪ That there are two types of benchmarking <ul style="list-style-type: none"> <li>▪ Industry benchmarking (dissimilar demographics)</li> <li>▪ Peer group benchmarking (similar demographics)</li> </ul> </li> <li>▪ How questions are interpreted or answered by other participants of the exercise</li> <li>▪ The differing goals and objectives of participating organizations</li> <li>▪ The differing skill sets based on business needs</li> <li>▪ The different technology/tools utilized by the participating organizations</li> <li>▪ Benchmarking may be considered as a panacea</li> <li>▪ All relevant data must be accurately captured and viewed in context</li> </ul>

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Topic	Competency	Range of Knowledge
	14 Describe the benefits of benchmarking	<p>The benefits of benchmarking include:</p> <ul style="list-style-type: none"> <li>▪ It facilitates service desk best practices</li> <li>▪ It develops an understanding of alternative service offerings</li> <li>▪ It facilitates implementation of continual improvement initiatives</li> </ul>
	15 Describe interaction monitoring	Interaction monitoring means to monitor all communications with the service desk from all communications channels used.
	16 Give examples of methods used for interaction monitoring	<p>Examples of methods for monitoring interactions include:</p> <ul style="list-style-type: none"> <li>▪ Regular reviews of incident and service request logs</li> <li>▪ Regular reviews of the audit trails of all communication channels used</li> </ul>
	17 List the benefits of incident and service request monitoring	<p>The benefits of incident and service request monitoring include:</p> <ul style="list-style-type: none"> <li>▪ Provides a seamless end-to-end incident and service request management procedure</li> <li>▪ Provides quality and service assurance for customers and the service desk</li> <li>▪ Allows the service desk to proactively address situations rather than reacting to them</li> <li>▪ Reviews the incident or service request with the analyst to help develop self-improvement</li> <li>▪ Identifies opportunities for ongoing improvement</li> <li>▪ Identifies training needs</li> </ul>
	18 Give examples of methods used for incident and service request monitoring	<p>Methods used for monitoring incidents and service requests include:</p> <ul style="list-style-type: none"> <li>▪ Review documentation for completeness and accuracy</li> <li>▪ Conduct an on-line review with the analyst after the incident or service request is closed</li> <li>▪ Follow-up calls</li> <li>▪ Customer satisfaction surveys</li> <li>▪ Incident/service request tracking</li> <li>▪ Service level tracking</li> <li>▪ Automatic escalation within the IT service management system</li> </ul>
	19 List the benefits of call monitoring	<p>The benefits of call monitoring include:</p> <ul style="list-style-type: none"> <li>▪ It ensures that the call handling procedure is followed</li> <li>▪ It provides feedback to staff about job performance</li> <li>▪ It identifies the strengths and weaknesses of individuals and the service desk</li> <li>▪ It provides coaching opportunities</li> <li>▪ It verifies consistency in call management</li> <li>▪ It identifies areas where procedures are not meeting expectations or are not being followed</li> <li>▪ It identifies opportunities for improvement</li> <li>▪ It improves the quality of service</li> <li>▪ It identifies training opportunities</li> </ul>

4 Operational Management		
Topic	Competency	Range of Knowledge
	20 Identify methods for call monitoring	<p>Methods for monitoring calls include:</p> <ul style="list-style-type: none"> <li>▪ Live service observations - reviewer sits with an analyst and listens in on a call</li> <li>▪ Remote service observations - reviewer listens to calls live, but the analyst is not aware that the call is being evaluated</li> <li>▪ Call recording and evaluation</li> <li>▪ Follow-up calls</li> <li>▪ Conducting customer satisfaction surveys</li> </ul>
14 Structure Models for Service Delivery	1 Identify the various structure models the service desk uses for delivering service	<p>The various structure models the service desk uses for delivering service are:</p> <ul style="list-style-type: none"> <li>▪ Local</li> <li>▪ Centralized</li> <li>▪ Virtual <ul style="list-style-type: none"> <li>▪ follow-the-sun</li> <li>▪ specialized (by channel or technology)</li> </ul> </li> </ul>
	2 Identify the variables used to determine which support delivery structure model(s) is most appropriate	<p>The variables used to determine which support delivery structure model(s) is most appropriate include:</p> <ul style="list-style-type: none"> <li>▪ Cost</li> <li>▪ Range and complexity of the services offered</li> <li>▪ Sourcing strategy</li> <li>▪ Stipulations in service level agreements (SLAs) or support contracts</li> <li>▪ Location of the customer</li> <li>▪ Time zones of the customer and the service desk</li> <li>▪ Business requirements for hours of operation</li> <li>▪ Effectiveness of remote support tools</li> <li>▪ Effectiveness of knowledge management</li> <li>▪ Cultural factors</li> </ul>
15 Service Desk Critical Success Factors (CSFs) Key Performance Indicators (KPIs) and Metrics	1 Explain the difference between critical success factors, key performance indicators and metrics	<p>A critical success factor is the term applied to an element that is necessary for an organization, project or process to achieve its mission. They are the critical factors or activities required for ensuring the success of an organization.</p> <p>Key performance indicators are measures of performance. Such measures are commonly used to help an organization define and evaluate its progress toward achieving its goals.</p> <p>Metrics are standards of measurement by which efficiency, performance, progress, or quality of a plan, process, or product can be assessed.</p>
	2 Identify some of the service desk's critical success factors	<p>Examples of the service desk's critical success factors include:</p> <ul style="list-style-type: none"> <li>▪ Having correctly skilled analysts</li> <li>▪ Having an efficient integrated service management system</li> <li>▪ Having access to an up-to-date knowledge base</li> <li>▪ Having the processes and equipment in place to keep the organization productive and to meet support needs quickly and effectively</li> <li>▪ Evidence of a balance between service desk activities and costs incurred</li> </ul>

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Topic	Competency	Range of Knowledge
	3 Identify some of the service desk's key performance indicators	<p>Examples of service desk key performance indicators (KPIs) include:</p> <ul style="list-style-type: none"> <li>▪ Percentage of first time resolutions</li> <li>▪ Percentage of first level resolutions</li> <li>▪ Percentage abandon rate</li> <li>▪ Average cost per incident</li> <li>▪ Average cost per service request</li> <li>▪ Improved quality of classification</li> <li>▪ Percentage of incidents resolved within SLA</li> <li>▪ Percentage of incidents that breached SLA</li> <li>▪ Percentage of correctly assigned functional escalations</li> <li>▪ Percentage of correct priority assignments</li> <li>▪ Percentage of correct category assignments</li> <li>▪ Level of customer satisfaction</li> <li>▪ Number of customer complaints</li> </ul>
	4 Describe the uses of service desk metrics	<p>Service desk metrics are used to</p> <ul style="list-style-type: none"> <li>▪ Identify required resources for staffing and scheduling</li> <li>▪ Measure analyst performance</li> <li>▪ Understand overall service desk performance</li> <li>▪ Assess the level of customer satisfaction</li> <li>▪ Initiate service improvement programmes</li> </ul>
	5 Identify some of the common service management metrics measured by the service desk	<p>Examples of common service management metrics measured by the service desk include:</p> <ul style="list-style-type: none"> <li>▪ Number of interactions</li> <li>▪ Number and percentage of interactions by channel</li> <li>▪ Percentage of first contact resolution</li> <li>▪ Incident resolution time</li> <li>▪ Average time to respond</li> <li>▪ Percentage of abandoned calls and interactions not responded to</li> <li>▪ Average time to resolve by priority</li> <li>▪ Average time to resolve by category</li> <li>▪ Percentage of open incidents by age</li> <li>▪ Percentage of reopened incidents</li> <li>▪ Percentage of hierarchic escalations (management)</li> <li>▪ Percentage of functional escalations (re-assignment)</li> <li>▪ Percentage of interactions resolved within the service level agreement (SLA)</li> <li>▪ Comparison of service level agreement goals to actual results</li> <li>▪ Percentage of remote control interactions</li> <li>▪ Percentage of interactions using self-help</li> <li>▪ Total cost of ownership</li> <li>▪ Average cost per interaction by type</li> <li>▪ Average cost per interaction by channel</li> </ul>

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Topic	Competency	Range of Knowledge
	6 Identify some of the common customer satisfaction metrics measured by the service desk	<p>Examples of common customer satisfaction metrics measured by the service desk include:</p> <ul style="list-style-type: none"> <li>▪ Number and percentage of complaints/negative comments received and outstanding per month</li> <li>▪ Number of compliments</li> <li>▪ Number of suggestions received each month</li> <li>▪ Overall score of event (ongoing) satisfaction surveys returned each month</li> <li>▪ Overall score of periodic satisfaction surveys</li> </ul>
	7 Identify some of the common people satisfaction metrics measured by the service desk	<p>Examples of common people satisfaction metrics measured by the service desk include:</p> <ul style="list-style-type: none"> <li>▪ Overall score of the people satisfaction surveys returned</li> <li>▪ Staff attrition</li> <li>▪ Employee unplanned absence days</li> </ul>
16 Resource Management	1 Describe the objective of resource management	The objective of resource management is to determine resource requirements (staffing and scheduling) necessary to meet business demands in order to achieve goals
	2 Explain the benefits of resource planning models	<p>The benefits of resource planning models is that they:</p> <ul style="list-style-type: none"> <li>▪ Quantify the staffing and scheduling based on accepted operational management models</li> <li>▪ Quantify the staffing required to meet the SLA and business needs</li> <li>▪ Provide a consistent approach</li> </ul>
	3 Summarize the steps involved in resource scheduling	<p>The steps involved in resource scheduling include:</p> <ul style="list-style-type: none"> <li>▪ Forecast call volume using historical and current data and information about future requirements</li> <li>▪ Determine staffing requirements based on projected volume and service levels</li> <li>▪ Develop a schedule</li> <li>▪ Evaluate and monitor performance in comparison to projections</li> <li>▪ Adjust plans and expectations as necessary</li> </ul>

5 Tools and Technologies		
Topic	Competency	Range of Knowledge
1 Service Desk Infrastructure	1 Identify common technologies used by the service desk	<p>Common technologies used by the service desk include:</p> <ul style="list-style-type: none"> <li>▪ Service management systems supporting key processes</li> <li>▪ Telecommunication systems               <ul style="list-style-type: none"> <li>▪ Automated call distribution (ACD)</li> <li>▪ Computer telephony integration (CTI)</li> <li>▪ Interactive voice response (IVR)</li> <li>▪ Automatic voice recognition (AVR)</li> <li>▪ Digital call recording</li> </ul> </li> <li>▪ Work-force management systems</li> <li>▪ Reporting systems</li> <li>▪ Information delivery systems</li> <li>▪ Self-service systems</li> <li>▪ Self-healing systems</li> <li>▪ Remote support</li> <li>▪ Electronic communications</li> <li>▪ Wireless devices</li> <li>▪ Network discovery/monitoring tools</li> <li>▪ Internet/Intranet technology</li> <li>▪ Social media</li> <li>▪ Proactive on-line system checking (e.g. disk space availability, back-up completion)</li> </ul>
2 Service Management Systems	1 Describe the purpose of using IT service management systems in a service desk environment	The purpose of using IT service management systems is to provide consistent and integrated service operations and service delivery.
	2 Explain the primary objectives for using IT service management tools	<p>The primary objectives for using IT service management tools in a service desk environment are to:</p> <ul style="list-style-type: none"> <li>▪ Record, track and manage incidents, problems and changes separately</li> <li>▪ Link incidents, problems and changes together and link to configuration items</li> <li>▪ Provide process reporting/metrics from a single tool</li> <li>▪ Have the capability to add on/activate modules as processes are implemented.</li> <li>▪ Integrate with system monitoring tools and alert systems</li> <li>▪ Facilitate SLA management and service reporting</li> <li>▪ Provide asset and configuration management functionality to store and maintain configuration item records</li> <li>▪ Provide and/or integrate with knowledge tools</li> </ul>
	3 Identify the benefits for using IT service management tools	<p>The benefits of using IT service management tools include:</p> <ul style="list-style-type: none"> <li>▪ Facilitates the delivery of integrated processes</li> <li>▪ Provides an accountable and traceable supporting tool-set</li> <li>▪ Delivers consistent service management performance metrics and reports</li> </ul>

5 Tools and Technologies		
Topic	Competency	Range of Knowledge
3 Telephony	1 Describe the purpose of an automatic call distributor (ACD) system in a service desk environment	The purpose of an automatic call distributor (ACD) is to provide a consistent and manageable telephone response operation.
	2 Explain the primary objectives for implementing an ACD system	The primary objectives for implementing an ACD system are to: <ul style="list-style-type: none"> <li>▪ Manage the distribution of calls</li> <li>▪ Manage analyst performance and work load</li> <li>▪ Automate rapid telephone responses</li> <li>▪ Provide callers with options and information when on hold</li> </ul>
	3 Identify the benefits of implementing an ACD system	The benefits of an ACD include facilities such as: <ul style="list-style-type: none"> <li>▪ Skills-based routing</li> <li>▪ First-available analyst, longest available analyst</li> <li>▪ Advanced service desk metrics and reporting</li> <li>▪ Call queuing</li> </ul>
4 Computer Telephony Integration (CTI)	1 Describe the purpose of computer telephony integration (CTI) in a service desk environment	The purpose of computer telephony integration in a service desk environment is to integrate telephony equipment with other technologies to facilitate the efficient processing of customer contacts.
	2 Explain the primary objectives of CTI in a service desk environment	The primary objectives of CTI in a service desk environment are to: <ul style="list-style-type: none"> <li>▪ Identify callers to analysts (e.g. the screen is populated the caller's contact details)</li> <li>▪ Display customer specific data to support staff automatically</li> <li>▪ View customer/management statistics and reporting data across multiple platforms</li> <li>▪ Apply business rules for delivering personalized service, i.e., routing to a specific individual or team</li> </ul>
	3 Identify the benefits of CTI in a service desk environment	The benefits of CTI in a service desk environment include: <ul style="list-style-type: none"> <li>▪ Improved efficiency</li> <li>▪ Can automate fast responses and resolutions</li> <li>▪ Analysts have rapid and dynamic access to customer details without asking customers</li> <li>▪ Delivery of a slick and professional customer service experience</li> </ul>

5 Tools and Technologies		
Topic	Competency	Range of Knowledge
5 Support Delivery Tools and Methodologies	1 Identify the most common tools and methodologies for delivering service	<p>The most common tools and methodologies used by the service desk for delivering service are:</p> <ul style="list-style-type: none"> <li>▪ Assisted service <ul style="list-style-type: none"> <li>▪ Telephone</li> <li>▪ Desk side</li> <li>▪ Electronic <ul style="list-style-type: none"> <li>▪ Remote access/control</li> <li>▪ Instant Messaging (IM)</li> <li>▪ E-mail</li> <li>▪ On-line live chat</li> <li>▪ Social Media</li> </ul> </li> </ul> </li> <li>▪ Self-service <ul style="list-style-type: none"> <li>▪ Self-logging applications</li> <li>▪ Self-help applications</li> <li>▪ Knowledge bases</li> <li>▪ Interactive Voice Response (IVR)</li> <li>▪ On-line documentation and tutorials</li> </ul> </li> </ul>
6 Telephone Support	1 Describe the purpose of telephone support delivery in the service desk environment	<p>The purpose of telephone support is to:</p> <ul style="list-style-type: none"> <li>▪ Provide first-line support, though may also provide second-line support</li> <li>▪ May be used in conjunction with remote support technologies to assist in service restoration</li> <li>▪ Reduce time to resolution</li> <li>▪ Build relationships with customers through direct interaction</li> </ul>
	2 Explain the objectives of telephone support delivery in the service desk environment	<p>The objectives of telephone support are:</p> <ul style="list-style-type: none"> <li>▪ To resolve the majority of incidents and service requests at the first point of customer contact</li> <li>▪ To validate and ensure data accuracy</li> </ul>
	3 Identify the benefits of telephone support as a service delivery method	<p>The benefits of delivering support by telephone include:</p> <ul style="list-style-type: none"> <li>▪ Rapid access to service desk staff</li> <li>▪ Interactive two-way communication</li> <li>▪ Can hear the message</li> </ul>
7 On-site (Desk-side) Support	1 Describe the purpose of on-site (desk-side) support in a service desk environment	<p>On-site (desk-side) support is typically used when the incident or service request cannot be resolved remotely. Its purpose is to provide a support professional to visit a customer's physical location to respond to an incident or service request.</p>
	2 Explain the objectives of on-site (desk-side) support in a service desk environment	<p>On-site (desk-side) support objectives include:</p> <ul style="list-style-type: none"> <li>▪ Providing the most appropriate form of support to meet customer requirements</li> <li>▪ Educating customers about basic aspects of the incident's resolution</li> <li>▪ Developing rapport between analysts and customers</li> </ul>
	3 Identify the benefits of using desk-side support as a service delivery method	<p>The benefits of desk-side support delivery include:</p> <ul style="list-style-type: none"> <li>▪ One-to-one and face-to-face communication with customers establishes better rapport</li> <li>▪ Support analysts can view the environment from the customer's perspective</li> <li>▪ Facilitates better understanding of customer situation/environment</li> </ul>



5 Tools and Technologies		
Topic	Competency	Range of Knowledge
8 Electronic Support Tools	1 Describe the principal purposes of using electronic support tools in a service desk environment	<p>The principal purposes of using electronic support tools such as remote support, instant messaging, e-mail, on-line chat and social media is to:</p> <ul style="list-style-type: none"> <li>▪ Quickly restore customers to a functioning state</li> <li>▪ Overcome communication barriers</li> <li>▪ Enhance the customer and service desk relationship</li> </ul>
	2 Explain the primary objectives of using electronic support delivery tools in a service desk environment	<p>The primary objectives of using electronic support delivery tools in a service desk environment are to:</p> <ul style="list-style-type: none"> <li>▪ Increase the first time fix rate</li> <li>▪ Reduce the number of escalated calls</li> <li>▪ Reduce lost customer productivity by reducing time to resolution</li> </ul>
	3 Identify the benefits of using electronic support delivery tools in a service desk environment	<p>The primary benefits of using electronic support delivery tools in a service desk environment are:</p> <ul style="list-style-type: none"> <li>▪ Reduction in unit costs (cost per service request/incident)</li> <li>▪ Increased number of incidents and service requests resolved per analyst</li> <li>▪ Allows analysts to see what customers see (remote support)</li> <li>▪ Provides an opportunity for analysts to educate customers to be more self-sufficient</li> <li>▪ May restore services faster</li> <li>▪ May improve customer satisfaction</li> </ul>
9 Self-service	1 Describe IT self-service in a service desk environment	<p>IT self-service provides customers with the facilities needed to manage their service desk interactions and to find answers to common problems. Self-service covers two areas:</p> <ul style="list-style-type: none"> <li>▪ Self-logging provides customers with the facility to log and track the status of their incidents and service requests. Typically this is performed using the Internet or an Intranet</li> <li>▪ Self-help provides customers with the facility to resolve simple issues themselves. It is available 24x7 regardless of service desk operating hours</li> </ul>
	2 Describe the purposes of IT self-service	<p>The purposes of IT self-service is to:</p> <ul style="list-style-type: none"> <li>▪ Reduce the cost of support while extending support services beyond the service desk's operating hours</li> <li>▪ Reduce the number of inbound interactions for simple incidents and service requests, thereby freeing up support resources to deal with more complex issues</li> </ul>

5 Tools and Technologies		
Topic	Competency	Range of Knowledge
	3 Explain the primary objectives of self-service in a service desk environment	<p>The primary objectives of self-service are to provide:</p> <ul style="list-style-type: none"> <li>▪ Self-logging facilities for:               <ul style="list-style-type: none"> <li>▪ Customers to log and track the status of their incidents and requests for change</li> <li>▪ Customers to update their contact information</li> <li>▪ The service desk to provide notification of outages and upcoming scheduled changes and maintenance to customers</li> </ul> </li> <li>▪ Self-help facilities for providing:               <ul style="list-style-type: none"> <li>▪ Service without the assistance of an analyst</li> <li>▪ Password resets</li> <li>▪ Simple incident resolution</li> <li>▪ Access to documentation (e.g. self-help manuals, policies and procedures, SLAs)</li> <li>▪ Access to training and on-line tutorials to improve customers' IT knowledge</li> <li>▪ Access to on-line knowledge bases</li> <li>▪ Access to technical instructions i.e. software usage and installations</li> </ul> </li> </ul>
	4 Identify the benefits of using self-service as a service delivery method in a service desk environment	<p>The benefits of using self-service as a service delivery method include:</p> <p>Self-logging</p> <ul style="list-style-type: none"> <li>▪ Relieves pressure on the service desk</li> <li>▪ Satisfies the self-sufficiency needs of some customer groups</li> <li>▪ Provides easy access for customers</li> <li>▪ Lowers the cost of support</li> <li>▪ Automatically updates customers with information about their current incidents or service requests</li> <li>▪ Allows customers to check the status of their current incidents or service requests</li> <li>▪ Provides information and updates to customers such as details of service outages and upcoming scheduled changes and maintenance</li> </ul> <p>Self-help</p> <ul style="list-style-type: none"> <li>▪ Is available 24x7, regardless of the service desk's operating hours</li> <li>▪ Lowers the cost of service desk support</li> <li>▪ Allows customers to resolve simple incidents without the assistance of an analyst (e.g. password resets, adding printers)</li> <li>▪ Allows service desk staff to focus on more complex issues</li> <li>▪ Offers customers an alternative channel for obtaining support</li> <li>▪ Faster incident or service request resolution for the customer</li> <li>▪ It provides cost effective and consistent responses to repetitive service requests</li> <li>▪ It enables customers to be more independent and self-sufficient</li> <li>▪ It may improve customer satisfaction and productivity</li> <li>▪ Provides customers with access to on-line documentation (e.g. processes, policies, procedures, SLAs and FAQs) training and tutorials</li> <li>▪ Empowers customers and improves their experience</li> </ul>

5 Tools and Technologies		
Topic	Competency	Range of Knowledge
10 Self-healing	1 Describe the purpose of self-healing tools	<p>The purpose of self-healing tools is to:</p> <ul style="list-style-type: none"> <li>▪ To resolve incidents and problems dynamically and automatically without customers needing to report them</li> <li>▪ To provide systems that can identify their own errors and correct them without human intervention</li> <li>▪ To provide proactive monitoring and alerting of service outages</li> </ul> <p>Note: May be dependent on the tool supplier to ensure that all product profiles are up-to-date</p>
	2 Explain the primary objectives of self-healing tools in a service desk environment	<p>The primary objectives of self-healing tools are to:</p> <ul style="list-style-type: none"> <li>▪ Recognize when an event has occurred and initiate pre-determined actions and responses</li> <li>▪ Recognize system failure conditions and initiate corrective actions to restore a system to a functioning state</li> <li>▪ Recognize corruption and restore the system from a backup</li> <li>▪ Automatically reset applications</li> <li>▪ Automatically run anti-virus applications</li> <li>▪ Automatically update registry settings</li> <li>▪ Automatically reset key files every time a customer executes an application (e.g., DLL files)</li> </ul>
	3 Identify the benefits of using self-healing as a service delivery method	<p>The benefits of using self-healing as a service delivery method include:</p> <ul style="list-style-type: none"> <li>▪ Increased productivity</li> <li>▪ Reduced need for reactive support staff</li> <li>▪ Improved utilization of IT staff</li> <li>▪ Reduced resolution time for some incidents</li> </ul>
11 Cloud Computing	1 Explain the meaning of cloud computing, Software-as-a-Service (SaaS), Infrastructure-as-a-Service (IaaS), Platform-as-a-Service (PaaS) and Business Process as-a-Service (BPaaS)	<p>Cloud computing is a generic term for Internet based access to technology enabled services.</p> <p>The four key cloud delivery models are:</p> <ul style="list-style-type: none"> <li>▪ Infrastructure-as-a-Service (IaaS) - offers pay-as-you-go access to servers, disk space and networks</li> <li>▪ Platform-as-a-Service (PaaS) - provides a pre-built infrastructure (platform) for applications to be deployed directly by the user</li> <li>▪ Software-as-a-Service (SaaS) - offers ready built applications provided directly via an Internet connection. This delivery method is now being used by many service desk tool providers</li> <li>▪ Business Process-as-a-Service (BPaaS) – usually offers a combination of other pay-as-you-go ‘as-a-Service’ offerings. A supplier organization will provide business services to multiple customers to provide extra capacity when needed. For example, call centre, HR or payroll processing</li> </ul>

5 Tools and Technologies		
Topic	Competency	Range of Knowledge
12 Social Media	1 Describe social media	<p>Social media is the use of technology combined with social interaction to create on-line communities, share knowledge and connect people to information faster i.e. forums, on-line communities, blogs, podcasts.</p> <p>Social media:</p> <ul style="list-style-type: none"> <li>▪ Comprises primarily Internet and mobile tools using words, pictures, audio and video</li> <li>▪ Transforms people from content consumers into content producers</li> <li>▪ Enables organizations to build on-line communities in order to develop stronger relationships with customers and markets</li> </ul>
	2 Advise on how to use social media tools effectively	<p>The principles of using social media tools effectively are:</p> <ul style="list-style-type: none"> <li>▪ Differentiating between traditional media and social media</li> <li>▪ Service desk participation in creating an organization-wide customer engagement strategy</li> <li>▪ Selecting social media tools that are appropriate to your organization's environment</li> <li>▪ Using listening and monitoring techniques to develop an understanding of the audience</li> <li>▪ Making it easy for your market to find you – links are critical</li> <li>▪ Using keywords on products, services or expertise</li> <li>▪ Using a variety of social media tools which will appeal to your market</li> </ul>
	3 Assist in creating a social media policy for the organization that includes service desk requirements	<p>In order to create an organization-wide social media policy consider:</p> <ul style="list-style-type: none"> <li>▪ The impact on existing organization-wide policies and terms of employment</li> <li>▪ Knowledge and education levels of staff</li> <li>▪ The organization's brand and reputation management strategy</li> <li>▪ Confidential information, copyrights and trademarks</li> <li>▪ How to handle negative comments and feedback in the public domain</li> <li>▪ How to behave on-line</li> <li>▪ Introducing usage restrictions</li> <li>▪ The community – who constitutes the potential market -customers/followers – profiles, demographics and psychographics</li> <li>▪ Underpinning service management processes and policies</li> <li>▪ The evolution of the policy to accommodate rapidly evolving tools and technologies</li> </ul>

5 Tools and Technologies		
Topic	Competency	Range of Knowledge
	4 Improve staff productivity using social media tools	<p>Using social media may improve staff productivity in the following ways:</p> <ul style="list-style-type: none"> <li>▪ Collaboration, knowledge and sharing ideas leads to innovation</li> <li>▪ Faster incident identification using real-time monitoring and customer call logging via social media</li> <li>▪ Improved IT/business collaboration e.g. virtual change advisory board (CAB)</li> <li>▪ Immediate access to knowledge empowers the user community</li> <li>▪ Knowledge sharing reduces calls or requests to the service desk</li> <li>▪ Quicker dissemination of service updates and relevant news to customers</li> </ul>
	5 Summarize social media risks and security issues	<p>The risks and security issues encountered when using social media tools include:</p> <ul style="list-style-type: none"> <li>▪ Malicious code and virus distribution</li> <li>▪ Spam, phishing, hacking</li> <li>▪ Negative comments or feedback in the public domain</li> <li>▪ Employee productivity</li> <li>▪ Sharing of confidential information</li> <li>▪ Use of sites that may be blocked by the organization's firewalls</li> <li>▪ Confidence and skill of employees</li> <li>▪ Using the right tool for customers/audience</li> </ul>

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6 Human Resources and Team Development		
Topic	Competency	Range of Knowledge
1 Recruitment	1 Identify requirements for effective service desk recruitment	<p>The requirements for effective service desk recruitment include:</p> <ul style="list-style-type: none"> <li>▪ Identifying the competencies necessary for the position</li> <li>▪ Ensuring job descriptions and role profiles are up to date and properly reflect the activities the candidate will be required to perform</li> <li>▪ Performing a skills gap analysis</li> <li>▪ Identifying the appropriate salary for the position</li> <li>▪ Following your organization's recruitment processes and procedures</li> </ul>
	2 Identify elements of the recruitment process	<p>Examples of elements of the recruitment process are:</p> <ul style="list-style-type: none"> <li>▪ Using structured and defined interviewing processes</li> <li>▪ Involving model team members in the interview and selection process</li> <li>▪ Performing telephone interviews</li> <li>▪ Verifying references</li> <li>▪ Employing relevant techniques for evaluating skills</li> </ul>
	3 Identify qualities and skills to look for in staff	<p>Qualities and skills to look for when recruiting staff include:</p> <ul style="list-style-type: none"> <li>▪ Attributes (qualities): <ul style="list-style-type: none"> <li>▪ Accepts change and adapts easily</li> <li>▪ Learns quickly</li> <li>▪ Multi-tasks</li> <li>▪ Good temperament (patient, empathetic)</li> <li>▪ Problem-solver</li> <li>▪ Customer service ethos</li> <li>▪ Accepts personal accountability</li> <li>▪ Self-motivated</li> <li>▪ Team player</li> <li>▪ Follows policies, procedures and guidelines</li> <li>▪ Continually improves</li> <li>▪ Calm under pressure</li> <li>▪ Technical knowledge</li> <li>▪ Business knowledge</li> <li>▪ ITSM knowledge (useful)</li> </ul> </li> <li>▪ Skills (abilities): <ul style="list-style-type: none"> <li>▪ Communication <ul style="list-style-type: none"> <li>▪ Listening</li> <li>▪ Writing</li> <li>▪ Questioning</li> <li>▪ Verbal</li> </ul> </li> <li>▪ Customer service</li> <li>▪ Troubleshooting</li> <li>▪ Problem solving</li> <li>▪ Time management</li> <li>▪ Personal organizational skills</li> </ul> </li> </ul>

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Topic	Competency	Range of Knowledge
2 Staff Induction and Training	1 Describe the features of a structured induction process	<p>Induction planning for IT and service desk staff includes:</p> <ul style="list-style-type: none"> <li>▪ A task list of key pre-induction activities e.g. set up logins, plan the staffing rota</li> <li>▪ A standard agenda of key points to cover e.g. the organization's goals, key contacts, human resources and employment issues, IT goals, IT services, SLAs, IT security and the organization's policies, processes and procedures, customers, IT contacts, technical data</li> <li>▪ Defining milestones and scheduling regular process reviews</li> <li>▪ Agreeing the key individuals to be involved in the process</li> <li>▪ Reviewing the mechanism and the ownership of the service desk induction process</li> </ul>
	2 Describe the benefits of a structured approach to induction	<p>The primary benefits of a structured approach to induction include:</p> <ul style="list-style-type: none"> <li>▪ Reduced time to get new staff working effectively</li> <li>▪ Reduced risk of basic errors and misunderstandings</li> <li>▪ Reduced risk of adopting bad habits</li> <li>▪ A focus on coordinated activities improves communications across departments</li> </ul>
	3 Describe the features of a structured approach to training	<p>The features of a structured approach to training include:</p> <ul style="list-style-type: none"> <li>▪ A structured training plan for all service desk staff is in place</li> <li>▪ A skills matrix (soft and technical skills) is in place for all staff</li> <li>▪ A training budget is in place with a set allocation for staff training days</li> <li>▪ A training plan linked to the job role and KPIs, plus career goals</li> <li>▪ The training plan is reviewed by staff and manager at least annually</li> <li>▪ Feedback from reviews and appraisals is used to develop practical training programmes</li> <li>▪ Feedback from reviews and appraisals is held in human resource records and reviewed annually</li> <li>▪ A review mechanism and ownership for the training process</li> </ul>
	4 Describe the benefits of a structured approach to training	<p>The primary benefits of a structured approach to training are:</p> <ul style="list-style-type: none"> <li>▪ Improved staff productivity and consistency</li> <li>▪ Reduced risk of errors and failures</li> <li>▪ Reduced cost of failures</li> <li>▪ More effective use of training budget</li> <li>▪ Improved morale</li> <li>▪ Improved job satisfaction</li> </ul>

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Topic	Competency	Range of Knowledge
3 Retention	1 Demonstrate the behaviours for creating a positive working environment	<p>Behaviours for creating a positive working environment include:</p> <ul style="list-style-type: none"> <li>▪ Treat everyone with respect</li> <li>▪ Recognize team and individual accomplishments</li> <li>▪ Communicate team goals and successes</li> <li>▪ Communicate and celebrate success</li> <li>▪ Offer competitive rates of pay</li> <li>▪ Involve employees in decision making</li> <li>▪ Seek feedback</li> <li>▪ Create learning opportunities</li> <li>▪ Create a sense of belonging</li> <li>▪ Share information</li> <li>▪ Consider offering flexible work schedules (as appropriate)</li> </ul>
	2 Demonstrate the behaviours for achieving long-term working relationships with members of your staff	<p>Behaviours for achieving long-term working relationships with members of your staff include:</p> <ul style="list-style-type: none"> <li>▪ Treat team members with respect</li> <li>▪ Treat all staff fairly</li> <li>▪ Review the team's structure for opportunities to make best use of the skills of team members</li> <li>▪ Provide opportunities for staff to use a variety of skills</li> <li>▪ Delegate authority for decision making where appropriate</li> <li>▪ Be consistent</li> <li>▪ Be supportive in order to facilitate optimum performance</li> <li>▪ Evaluate and develop the performance of team members</li> <li>▪ Build a skills matrix of staff with their target and actual skills levels in order to develop a training plan</li> <li>▪ Provide career and personal development opportunities</li> <li>▪ Encourage feedback and new ideas from staff</li> </ul>
	3 Describe how to constructively address individual performance issues	<p>To constructively address individual performance issues:</p> <ul style="list-style-type: none"> <li>▪ Ensure the organization's policies are followed</li> <li>▪ Handle issues in a timely manner</li> <li>▪ Be specific and not general in your discussions</li> <li>▪ Discuss the causes of the problem before the solution</li> <li>▪ Keep the focus of the discussion on the specific issue/behaviour</li> <li>▪ Explain to the individual the importance of change to them and to the team</li> <li>▪ Discuss the potential growth opportunities implicit in change</li> <li>▪ Focus on changing the behaviour rather than changing the person</li> <li>▪ Communicate the desired outcome of the change in behaviour</li> </ul>



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Topic	Competency	Range of Knowledge
	4 Employ methods for gathering the information required to measure employee satisfaction information	<p>Methods for gathering employee satisfaction information for analysis include:</p> <ul style="list-style-type: none"> <li>▪ Structured feedback mechanisms (internal surveys, appraisal process)</li> <li>▪ Regular 'one-to-ones' with staff and managers</li> <li>▪ Feedback from team discussions</li> <li>▪ Informal and social interaction</li> <li>▪ Observing changes in team and individual performance</li> <li>▪ Keeping staff morale as a regular item at management meetings</li> <li>▪ Regular reviews of absenteeism data</li> <li>▪ Exit interviews</li> </ul>
4 Management	1 Describe the characteristics of effective management	<p>The characteristics of effective management include:</p> <ul style="list-style-type: none"> <li>▪ The mission is successfully implemented</li> <li>▪ Tactical and strategic views are evident and planning takes place</li> <li>▪ Work is performed correctly</li> <li>▪ People are encouraged to take on additional responsibility</li> <li>▪ Effective procedures are developed and implemented</li> <li>▪ The service desk and the organization's business is effectively promoted</li> </ul>
	2 Identify the major activities of a manager	<p>The major activities of a manager are to:</p> <ul style="list-style-type: none"> <li>▪ Plan</li> <li>▪ Organize resources</li> <li>▪ Direct, control and co-ordinate activities</li> </ul>
	3 Explain the different types of planning methods	<p>The types of planning methods are:</p> <ul style="list-style-type: none"> <li>▪ Strategic planning - long-term vision of what an organization needs to achieve in order to meet its objectives</li> <li>▪ Tactical planning - the detailed plan for achieving the objectives set by the strategic plan</li> <li>▪ Operational planning – the day-to-day work routine that focuses on operational tasks and long-term projects</li> </ul>
	4 List the elements required for developing successful plans	<p>The elements required for developing successful plans include:</p> <ul style="list-style-type: none"> <li>▪ Define the mission objectives</li> <li>▪ Development of short, medium and long term objectives designed to help meet strategic goals</li> <li>▪ Assess and manage risks</li> <li>▪ Set goals and objectives</li> <li>▪ Set budgets</li> <li>▪ Review and develop new processes and service improvement plans</li> </ul>

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Topic	Competency	Range of Knowledge
	5 Demonstrate how to successfully organize resources	To successfully organize resources: <ul style="list-style-type: none"> <li>Define the appropriate structure</li> <li>Identify resource requirements</li> <li>Align resources to projects, processes and activities</li> <li>Identify required skills</li> <li>Ensure that resources are in the right place, with the correct skills and attitude, at the right time</li> </ul>
	6 Describe how to direct, control and co-ordinate activities	To direct, control and co-ordinate activities: <ul style="list-style-type: none"> <li>Set the direction, influence the team, and individuals</li> <li>Delegate and empower where appropriate</li> <li>Prioritize tasks appropriately</li> <li>Provide guidance when required</li> <li>Obtain feedback, analyze and recommend: <ul style="list-style-type: none"> <li>Processes</li> <li>Procedures</li> <li>Systems</li> <li>Resources</li> </ul> </li> <li>Monitor, review and report against agreed measures</li> </ul>
5 Leadership	1 Recognize the characteristics of good leadership	The characteristics of good leadership include: <ul style="list-style-type: none"> <li>Recognizing the difference between leadership and management</li> <li>Displaying trust</li> <li>Being open</li> <li>Maintaining a positive perspective</li> <li>Encouraging participation</li> <li>Discouraging one person from dominating the team</li> <li>The provision of effective incentives that are challenging, yet attainable</li> <li>Effective delegation</li> <li>Creativity and initiative is encouraged in others</li> <li>Practising and encouraging fairness</li> <li>Making decisions, even when they may be unpopular</li> <li>Executing plans successfully</li> <li>Demanding more from themselves than from others</li> <li>Practising and encouraging continual personal development</li> <li>The ability to assess and work with the differing needs and abilities of all their staff</li> <li>Having excellent communication skills</li> </ul>
	2 Demonstrate leadership characteristics	To demonstrate leadership characteristics: <ul style="list-style-type: none"> <li>Define or interpret the vision and strategic direction</li> <li>Communicate the vision and direction to the service desk</li> <li>Inspire service desk staff to undertake activities to achieve success</li> <li>Motivate and mentor</li> <li>Lead by example</li> <li>Be an excellent communicator</li> </ul>

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Topic	Competency	Range of Knowledge
	3 Explain the benefits of motivation	<p>The benefits of motivation include:</p> <ul style="list-style-type: none"> <li>▪ Encourages innovation</li> <li>▪ Encourages responsible risk taking</li> <li>▪ Inspires people to achieve new visions</li> <li>▪ Inspires delivery of consistent, high-quality service</li> <li>▪ Encourages commitment to the aspirations of the service desk</li> <li>▪ Improves staff retention</li> </ul>
	4 Describe methods to improve service desk performance	<p>Methods for improving service desk performance include:</p> <ul style="list-style-type: none"> <li>▪ Reviewing and analysing past successes to identify strengths, weaknesses, opportunities, and threats (SWOT) in order to identify areas for growth</li> <li>▪ Implementing continual improvement programmes</li> <li>▪ Developing programmes that reward initiative</li> <li>▪ Test staff on their usage and understanding of the activities, policies, processes and procedures required to fulfil their role</li> <li>▪ Setting challenging, achievable goals</li> <li>▪ Benchmarking with best practices and/or other service desks</li> </ul>
	5 Describe how to recognize and reward staff	<p>To recognize and reward staff:</p> <ul style="list-style-type: none"> <li>▪ Highlight individual and team contributions individually and publicly</li> <li>▪ Recognize and publicize in a manner meaningful to the recipient</li> <li>▪ Reinforce and recognize desired behaviours in a timely manner</li> <li>▪ Have consistent, fair and equitable recognition and reward programmes</li> <li>▪ Work creatively within the organization's guidelines</li> </ul>
	6 Describe ways to provide direction and focus during ambiguous or chaotic circumstances such as major incidents or periods of stress	<p>Examples of ways to provide direction and focus during ambiguous or chaotic circumstances include:</p> <ul style="list-style-type: none"> <li>▪ Creating a communication hub so that people can get accurate information quickly</li> <li>▪ Empathizing with team members</li> <li>▪ Using your presence to help provide clarity and direction</li> <li>▪ Creating an environment in which team members can experience a sense of continuity and control in their work lives</li> </ul>
6 Teamwork	1 Describe the objective and the components of teamwork	<p>The objective of teamwork is to work together to achieve common goals.</p> <p>The components of teamwork include:</p> <ul style="list-style-type: none"> <li>▪ Working together to share ideas</li> <li>▪ Actively listening to each other</li> <li>▪ Sharing the workload fairly</li> </ul>

6 Human Resources and Team Development		
Topic	Competency	Range of Knowledge
	2 Identify the characteristics of an effective team player	<p>An effective team player:</p> <ul style="list-style-type: none"> <li>▪ Participates in team activities</li> <li>▪ Displays courtesy and respect for others</li> <li>▪ Collaborates with team members</li> <li>▪ Is open-minded to others' ideas (remains objective)</li> <li>▪ Shares knowledge</li> <li>▪ Contributes to and solicits ideas of others</li> <li>▪ Maintains a positive attitude</li> <li>▪ Is enthusiastic</li> <li>▪ Is flexible</li> <li>▪ Is dependable</li> <li>▪ Trusts others</li> <li>▪ Offers encouragement</li> <li>▪ Follows through on tasks</li> <li>▪ Shares the workload</li> <li>▪ Resolves conflicts</li> </ul>
	3 List the characteristics of an effective team	<p>An effective team:</p> <ul style="list-style-type: none"> <li>▪ Has clear goals/objectives</li> <li>▪ Has effective communication skills</li> <li>▪ Is empowered to make decisions</li> <li>▪ Displays a sense of participation</li> <li>▪ Has high productivity</li> <li>▪ Has high morale and motivation</li> <li>▪ Has multiple and varied skills</li> <li>▪ Has effective conflict resolution policies</li> <li>▪ Has a unified commitment</li> <li>▪ Meets agreed objectives and targets</li> </ul>
	4 Explain the benefits of having an effective team	<p>The benefits of having an effective team include:</p> <ul style="list-style-type: none"> <li>▪ An increased sense of belonging</li> <li>▪ A willingness to collaborate with and assist other team members</li> <li>▪ Improved productivity</li> <li>▪ Higher morale and motivation</li> <li>▪ Friendly and supportive work environment</li> <li>▪ Increased customer satisfaction</li> <li>▪ An environment of mutual trust and accountability</li> </ul>
	5 Describe a typical friendly and supportive workplace environment	<p>In a typical friendly and supportive workplace there is:</p> <ul style="list-style-type: none"> <li>▪ Rapport demonstrated among the members of the team</li> <li>▪ Evidence of empowerment from management</li> <li>▪ A clear willingness within the team to collaborate with and assist other team members</li> <li>▪ Responsible and trustworthy team members</li> <li>▪ A diverse blend of team members</li> <li>▪ Interest in each other's development is demonstrated and team members are not self-absorbed</li> </ul>

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Topic	Competency	Range of Knowledge
7 Professional Development	1 Identify methods for assessing the development needs of the service desk and service desk staff	<p>Methods for assessing the development needs of the service desk and service desk staff include:</p> <ul style="list-style-type: none"> <li>▪ Skills gap analysis</li> <li>▪ Position profiling</li> <li>▪ One-to-Ones</li> <li>▪ SWOT analysis</li> <li>▪ Informal feedback from other individuals or teams</li> <li>▪ 360 degree or peer assessment</li> </ul>
	2 Identify examples of common methods used for professionally developing staff	<p>Examples of common methods used to professionally develop staff include:</p> <ul style="list-style-type: none"> <li>▪ On-the-job, computer-based training and instructor-led training</li> <li>▪ Individual assessment (appraisal)</li> <li>▪ Provide staff with access to formal and informal training resources</li> <li>▪ Coaching</li> <li>▪ Mentoring</li> <li>▪ E-learning</li> <li>▪ Secondment to other teams/departments</li> <li>▪ Continual improvement programme</li> <li>▪ The achievement of relevant industry qualifications</li> <li>▪ Attending relevant conferences and seminars</li> </ul>
	3 Describe how to maintain and enhance staff development	<p>Maintain and enhance staff development by:</p> <ul style="list-style-type: none"> <li>▪ Reviewing and analysing past successes and failures in order to identify areas for new initiatives (SWOT analysis)</li> <li>▪ Implementing continual improvement programmes for the team and individuals</li> <li>▪ Developing programmes that reward initiative</li> <li>▪ Treating every failure as an opportunity to learn, not an opportunity to blame</li> </ul>
	4 Describe how to maintain and enhance personal development	<p>Maintain and enhance personal development by:</p> <ul style="list-style-type: none"> <li>▪ Creating a personal network of advisers with whom you can share problems and concerns</li> <li>▪ Concentrating on common goals during times of disagreement</li> <li>▪ Take on projects that are outside your comfort zone</li> <li>▪ Read management/motivation books and industry publications</li> <li>▪ Join and participate in professional organizations</li> <li>▪ Attending relevant conferences and seminars</li> </ul>

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Topic	Competency	Range of Knowledge
8 Coaching	1 Describe coaching	<p>Coaching is a process of learning and developing competent performance in the workplace - usually in the form of regular structured sessions between a suitable coach and a 'coachee' - to explore current competency levels, issues, attainments, ideas and possibilities.</p> <ul style="list-style-type: none"> <li>▪ It has specific, short-term objectives and outcomes</li> <li>▪ It is performance and task-related</li> <li>▪ It aims to develop potential or change behaviour</li> <li>▪ It helps to establish goals</li> <li>▪ It helps to define the current position in relation to the goals</li> <li>▪ It identifies the opportunities to achieve the goals</li> <li>▪ It establishes the will to undertake the required actions to achieve the goals</li> </ul>
	2 Explain the benefits of coaching	<p>The benefits of coaching include:</p> <ul style="list-style-type: none"> <li>▪ Improved professionalism and morale</li> <li>▪ Improved customer service quality</li> <li>▪ Helps the team to grow and excel</li> <li>▪ Improved performance leading to increased productivity through focussing on skills and core competencies at or above the standard required by the organization</li> </ul>
	3 Describe how to prepare to coach an analyst	<p>Prepare to coach an analyst by:</p> <ul style="list-style-type: none"> <li>▪ Assessing the employee's abilities, competencies and commitment level</li> <li>▪ Defining your goals and any issues</li> <li>▪ Defining your coaching plan</li> </ul>
	4 Describe the coaching process	<p>The coaching process:</p> <ul style="list-style-type: none"> <li>▪ Create an environment of trust</li> <li>▪ Define and communicate the reason for the coaching session</li> <li>▪ Begin a dialogue on ways to improve or excel</li> <li>▪ Listen with empathy</li> <li>▪ Encourage participation in the process by asking open questions</li> <li>▪ Test understanding</li> <li>▪ Use the analysts' suggestions whenever possible</li> <li>▪ Agree on an action plan: who will do what and when</li> <li>▪ Schedule a follow-up meeting after 5-10 days</li> </ul>
	5 Display the characteristics of an effective coach	<p>An effective coach:</p> <ul style="list-style-type: none"> <li>▪ Takes the time to learn about their colleagues: <ul style="list-style-type: none"> <li>▪ Life goals</li> <li>▪ Strengths and weaknesses</li> <li>▪ Career timetable</li> </ul> </li> <li>▪ Develops a work-life development plan with each individual</li> <li>▪ Follows-up on a regular basis to discuss progress to help shape future development</li> </ul>
9 Mentoring	1 Describe mentoring	<p>Mentoring is a process where an experienced person who understands a role provides the benefits of their knowledge and experience. They may act as a role model, guide, tutor, confidante, supporter or friend. Mentoring is a long term approach, taking into account all aspects of an individual's work and personal aspirations.</p>

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Topic	Competency	Range of Knowledge
	2 Explain the benefits of mentoring	<p>The benefits of mentoring are</p> <ul style="list-style-type: none"> <li>▪ People learn more quickly</li> <li>▪ Strengthens self-development</li> <li>▪ Provides help for the immediate challenges of the mentee</li> <li>▪ Develops inter-personal skills</li> <li>▪ Helps people cope with their role</li> </ul>
	3 Describe the benefits of peer mentoring (buddying)	<p>The benefits of peer mentoring include:</p> <ul style="list-style-type: none"> <li>▪ Builds a sense of community</li> <li>▪ Reduces time for new members to reach competency</li> <li>▪ Increases trust and respect among team members</li> <li>▪ Supports colleagues in their professional development and growth</li> <li>▪ Facilitates mutual learning</li> <li>▪ Provides functional cross-training</li> <li>▪ Maintains a good balance of skills</li> <li>▪ Simplifies integration into a team</li> <li>▪ Improved performance leading to increased productivity through focussing on skills and competencies on a personal level</li> </ul>
10 Stress Management	1 Describe stress	<p>Stress is a state of mental or emotional strain resulting from adverse or demanding circumstances and can affect both your body and your mind.</p> <p>Stress is a natural reaction and may have either a positive or negative impact.</p>
	2 Identify some of the symptoms and negative effects of stress	<p>Some of the symptoms and negative effects of stress are:</p> <p>Physical such as:</p> <ul style="list-style-type: none"> <li>▪ Increased respiration and perspiration</li> <li>▪ Redness of face</li> <li>▪ White knuckles</li> <li>▪ Weight loss</li> <li>▪ Vulnerability to illness</li> </ul> <p>Psychological such as:</p> <ul style="list-style-type: none"> <li>▪ Inability to concentrate</li> <li>▪ Over reaction</li> <li>▪ Mood swings</li> <li>▪ Short tempered or irritable</li> <li>▪ Extremely negative sarcastic/cynical approach</li> </ul>
	3 Identify some common causes of stress at work	<p>Some common causes of stress at work are:</p> <ul style="list-style-type: none"> <li>▪ Change</li> <li>▪ Too much work</li> <li>▪ Not enough time</li> <li>▪ Lack of resource</li> <li>▪ Lack of knowledge/training</li> <li>▪ Tight scheduling</li> <li>▪ Insufficient rest</li> <li>▪ Personal life situations</li> </ul>

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Topic	Competency	Range of Knowledge
	4 Describe techniques for managing stress	<p>Some of the recognized ways to manage stress are:</p> <ul style="list-style-type: none"> <li>▪ Recognize the positive aspects of stress</li> <li>▪ Recognize signs of stress in yourself and others</li> <li>▪ Share your concerns</li> <li>▪ Ensure you and your team have adequate breaks</li> <li>▪ Make time for yourself</li> <li>▪ Maintain a healthy work-life balance</li> <li>▪ Engage in diverse activities outside work</li> </ul>
	5 Recognize the positive effects of stress	<p>The positive effects of stress include:</p> <ul style="list-style-type: none"> <li>▪ Motivation and energy</li> <li>▪ Increased productivity</li> <li>▪ Optimized performance levels</li> <li>▪ Increased drive to get work done</li> </ul>

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