

Professional Standard

Service Desk Analyst



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SDI® Service Desk Analyst Standard v7.0

Professional Standard

Service Desk Analyst

SDI® Service Desk Analyst (SDA) Qualification Standard

This document contains the SDI Service Desk and Support Analyst (SDA) qualification standard. 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 them 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, shared service desks and managed service providers.

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 today's business environment, 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 Analyst exam is based on the SDA standard.

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

- Establish an international benchmark that recognize and develops the breadth of knowledge required to successfully fulfill relevant roles
- Document the skills needed to deliver consistent, high quality service and support
- Provide a mechanism, aligned to international industry standards, for developing people working in the IT service and support industry
- Provide leadership to the IT support industry by providing qualifications in IT 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 Analyst standard defines the skills required by service desk and support analysts. The Service Desk and Support Analyst qualification recognizes an individual's knowledge of customer service and support competencies and certifies that they have the skills required to work in the IT support industry. Individuals passing an SDI exam can be expected to:

- Demonstrate understanding of the roles and responsibilities of a service desk professional
- Develop and employ the essential skills required for a service desk and support analyst
- Summarize and follow service desk processes
- Identify and describe service desk tools and technologies

Name of the Qualification

Service Desk and Support Analyst

Target Demographics

The SDA qualification course is for front-line IT service and support analysts with some experience in a first-line or second-line service desk environment. This course will help analysts who are looking to grow in their role and gain a recognized qualification in their profession, develop practical skills while earning a certificate that endorses their commitment and knowledge. Examples of professional job titles include:

- Support Analyst
- Service Desk Analyst
- First-line Analyst
- Second-line Analyst
- Client Support Technician/Consultant
- Desktop Support Analyst
- Customer Support Officer
- Technical Support Analyst
- Service Centre Analyst

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 for their knowledge of the important topics listed in this standard to be recognized 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 knowledge and understanding of the professional demands placed on a service desk and support analyst, 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 customer and IT support industry
- Have a working knowledge of the following standard
- Have a strong desire to work in the customer IT support profession
- Have attended a course delivered by an APMG accredited training organization

Qualification Structure and Weighting

Concept	SDA Weighting %
Professionalism and Roles	20
Analyst Skills	35
Process	35
Supported Technologies and Enabling Tools	10
	100%

Terminology used in this document

Service Desk - the single point of contact between a service provider and its customers. A typical service desk handles all IT related communications, manages incidents and service requests.

Help Desk - a legacy name for a service desk.

IT Support Operation - support teams.

IT Organization - all internal departments or external businesses that provide IT services.

Organization - the business or company.

Interaction - customer engagements with the service desk from all channels supported.

Issue - a generic term used to describe incidents and IT or non-IT related service requests

Customer - anyone who uses the IT service on a day-to-day basis or who defines and agrees service level targets or purchases IT services. This embraces the ITIL definitions for customers and users.

Concept 1 - Professionalism

1.1 The Service Desk

1.1.1 Explain the role of the service desk

(Range of Knowledge (RoK) not exclusive)

The role of service desk is to serve as the single point of contact (SPOC) for all IT support related interactions.

1.1.2 Identify the activities of the service desk

(RoK not exclusive)

The activities of the service desk are:

- Deliver services that support business objectives and outcomes
- Demonstrate its value and contribution to the organization
- Identify and initiate service improvement initiatives
- Manage customer expectations
- Follow the organization's policies, processes and procedures
- Set the standard of behavior for customer engagement
- Provide customers with a first contact resolution whenever possible
- Provide a clear communication channel between customers and the IT organization
- Contribute to knowledge creation and maintenance
- Develop and implement effective processes and procedures to ensure consistent delivery of service and support
- Adhere to, police and support the organizations security policies or requirements
- Manage compliments, complaints and suggestions that relate to IT service and support delivery issues
- Represent the IT organization to its customers

1.1.3 Recognize what the service desk expects of its customers

(RoK not exclusive)

The service desk expects its customers to:

- Have knowledge of and comply with the contents of service level agreements
- Contact the service desk about all IT related issues and requirements using the appropriate and agreed channels
- Provide accurate and relevant information when requested
- Provide feedback including suggestions for improvement, compliments and justified complaints

1.1.4 Explain the role of service desk management

(RoK not exclusive)

The role of service desk management is to:

- Develop and implement service desk goals and targets that align with the organization's business objectives and outcomes
- Develop and manage the service desk team
- Encourage a culture of continual service improvement
- Ensure that the service desk team operates professionally on a daily basis
- Ensure that service quality expectations documented in the SLA are managed and met
- Oversee recruitment and encourage staff development
- Promote the service desk to the organization
- Ensure that the service desk is integrated into all relevant processes and activities
- Balance expenditure to keep IT support performing at the optimum level of quality and cost effectiveness

1.2 The Service Desk and Support Analyst

1.2.1 Explain the role of the Service Desk and Support Analyst

(RoK not exclusive)

The role of the Service Desk and Support Analyst is:

- Represent the IT organization and the service desk in a professional manner
- Consistently deliver quality customer service

1.2.2 Identify the responsibilities of the Service Desk and Support Analyst

(RoK not exclusive)

The responsibilities of the Service Desk and Support Analyst are to:

- Maintain and enhance customer satisfaction throughout the life-cycle of service desk interactions
- Manage customer expectations e.g. defined in service level agreements
- Provide appropriate support to resolve or assist in the resolution of service desk issues
- Document customers' issues accurately and consistently
- Maintain appropriate product and services knowledge
- Share knowledge
- Be aware of the IT organization's strategic aims, policies, processes and procedures in order to ensure that customers receive consistent messages
- Communicate effectively with all stakeholders
- Adhere and contribute to the service desk's processes and procedures
- Be aware of appropriate societal and environmental issues and responsibilities that relate to the service desk
- Have an understanding of both your organization's and your customers' business

1.2.3 Identify methods for enhancing personal professional development

(RoK not exclusive)

Methods for enhancing personal professional development include:

- Attend courses, seminars and industry events
- Subscribe to industry related publications
- Join and participate in industry related groups

1.3 Best Practices

1.3.1 Identify sources of service desk and IT good and best practices

(RoK not exclusive)

Sources of good and best practices include but are not limited to:

- SDI best practice standards
- ITIL® Framework
- ISO/IEC 20000 – IT Service Management
- ISO 9000 – Quality Management Systems
- ISO/IEC 27001 – Information Security Management Systems
- DevOps
- COBIT®

1.4 Policies and Legislation

1.4.1 Explain the objectives of having organizational policies

(RoK not exclusive)

The objectives of organizational policies are:

- Support consistent behavior
- Provide a framework for staff to perform their duties
- Provide a framework for delivering consistent service
- Provide clear definitions of the boundaries to work within
- Define procedures for dealing with inappropriate behavior
- Define a benchmark for professional service delivery

1.4.2 Identify some examples of organizational policies

(RoK not exclusive)

Some examples of organizational policies include but are not restricted to:

- Quality management
- Health and safety
- Equality and diversity
- Codes of conduct
- Security
 - Physical access
 - Cyber
 - Data protection

1.4.3 Summarize the importance of complying with local and international legislation

(RoK not exclusive)

It is important to comply with local and international legislation in order to:

- Deliver service and support within corporate and legal parameters
- Protect the organization from litigation
- Deliver good employee relations
- Provide a safe working environment
- Protect data
- Avoid damage to business reputation

1.5 Service Commitments and Ethics

1.5.1 Describe the concept of providing consistent service

(RoK not exclusive)

Providing consistent service means that:

- All customers receive the same quality of service
- Priority and category are consistently assigned in accordance with the SLA

1.5.2 Explain why following best practice and documented processes and procedures benefits customers and the service desk

(RoK not exclusive)

Following best practice and documented processes and procedures:

- Improves the quality of the support service
- Delivers a consistent customer experience
- Contributes to improved efficiencies and productivity
- Establishes credibility for analysts and the service desk

1.5.3 Explain personal accountability

(RoK not exclusive)

Personal accountability means to:

- Take ownership of customer issues and follow them through to resolution
- Admit to errors openly and honestly
- Adhere to a work schedule
- Behave and dress in accordance with the organization's policy

1.5.4 Identify the importance of making and honoring commitments

(RoK not exclusive)

To make and honor commitments:

- Establishes credibility for individuals, the team and the organization
- Improves employee morale
- Builds trust and customer confidence

1.5.5 Describe how to protect and enhance the image of the service desk

(RoK not exclusive)

To protect and enhance the image of the organization:

- Keep customers advised of the steps being taken to resolve their issue
- Give customers accurate information without blaming other organizations or departments
- Focus the customer on the resolution of the issue
- Demonstrate professionalism and promote positive results to increase customer confidence in the service desk
- Be aware of personal conduct outside of the service desk and the work environment that could affect the organization's image
- Engage with customers to build relationships

1.6 Service Attitude

1.6.1 Explain the terms attributes, skills and knowledge

(RoK not exclusive)

Attribute: quality, trait or characteristic

Skill: the ability to do something well

Knowledge: awareness or possession of information

1.6.2 List the characteristics of a good service attitude

(RoK not exclusive)

The characteristics of a good service attitude:

- Take ownership of issues and efficiently monitor them through to resolution
- Be accountable and responsible for your actions
- Convey a sincere willingness to help
- Maintain a positive attitude
- Treat all customers with respect and courtesy
- Focus attention on the customer
- Focus on your organization's business needs while providing customers with the best possible service

1.6.3 Recognize the impact of a good service attitude

(RoK not exclusive)

The impact of a good service attitude:

- Sets expectations for a positive customer experience
- Creates a positive perception of the service desk
- Helps to gain the customer's confidence and trust
- Builds rapport in order to encourage customers to return
- A good service attitude is contagious
- Enhances future contacts with customers
- Improves customer satisfaction

1.6.4 Describe the skills required to deliver excellent customer service

(RoK not exclusive)

The skills required to provide excellent customer service include:

- Listen to the customer
- Convey empathy
- Realize that customer needs and expectations might be different
- Develop and apply measurable processes and procedures
- Encourage excellent customer service in others
- Honor commitments made

1.6.5 List the features found in a supportive workplace

(RoK not exclusive)

Examples of features found in a supportive workplace include:

- Rapport among team members
- Empowerment from management
- Willingness to help each other
- Continual service improvement practices are embedded
- Team members:
 - Are responsible and reliable
 - Learn from one another
 - Share knowledge

1.7 Teamwork

1.1.7 Recognize the basic concepts of teamwork

(RoK not exclusive)

The basic concepts of teamwork include:

- Work together to accomplish common goals
- Work together to share ideas
- Actively listen to other team members
- Support rather than compete with or blame other team members
- Work with and build relationships with other teams
- Recognize and effectively utilize the different strengths and skills of individuals within a team

1.7.2 Describe the responsibilities of people working in a team environment

(RoK not exclusive)

The responsibilities of people working in a team environment include:

- Engage, contribute and collaborate in team activities
- Respect other team members
- Be open-minded to other team members' ideas
- Be punctual
- Share knowledge
- Take personal accountability for actions
- Raise concerns and challenges respectfully and constructively

1.7.3 List the benefits of teamwork

(RoK not exclusive)

The benefits of teamwork include:

- Team members buy in to team decisions
- Improved morale, motivation and job satisfaction
- Increased flexibility of team members
- Delivers consistent quality of service
- Builds a knowledgeable team with the skills required to support a wide range of products
- The capability of the team is improved

1.7.4 List the characteristics of an effective team

(RoK not exclusive)

Successful teams:

- Achieve goals and meet targets, objectives and customer expectations
- Demonstrate trust
- Receive effective support and direction from management
- Provide training to other team members
- Recognize and reward team and individual achievements
- Communicate effectively inside and outside the team
- Maintain processes and procedures to ensure service quality
- Are encouraged to participate in decision making
- Are valued by stakeholders

1.8 Business Relationships

1.8.1 List behaviors for establishing effective relationships with other parts of the organization

(RoK not exclusive)

To establish effective relationships with others in your organization:

- Treat others as you like to be treated
- Treat others in your organization as if they are your customers
- Focus on the resolution and do not blame others
- Understand the roles and responsibilities of other internal teams
- Explain the role and responsibilities of your team to stakeholders
- Take an interest in the role of other teams
- Adopt an 'everyone is responsible' attitude
- Share information

1.8.2 List behaviors for establishing effective relationships with team members

(RoK not exclusive)

To establish effective relationships with other team members:

- Treat others as you like to be treated
- Be loyal to your team
- Represent the organization well
- Share information with other team members
- Recognize team members for their skills and contributions
- Offer help and demonstrate flexibility

1.8.3 List behaviors for establishing effective relationships with customers

(RoK not exclusive)

To establish effective relationships with customers:

- Appreciate their needs and manage their expectations
- Meet their psychological needs first and then their business needs
- Build rapport
- Display empathy
- Deliver consistent service quality
- Have an understanding of their business
- Promote service desk achievements
- Maintain a service attitude
- Take ownership
- Be confident
- Use an appropriate communication method
- Engage face-to-face when possible and where appropriate

1.9 Cultural Sensitivity and Global Perspective

1.9.1 Demonstrate sensitivity and respect for other cultures

(RoK not exclusive)

To be sensitive to and respect other cultures :

- Accept and respect other approaches
- Notice when cultural differences negatively impact a situation and adapt appropriately
- Recognize how you react to different cultures
- Avoid imposing your own values and beliefs
- Understand others from their perspective
- Benefit from the cultural diversity encountered
- Manage the interaction
- Respect the views and opinions of others

1.9.2 Recognize the impact of language barriers when handling customers' issues

(RoK not exclusive)

A language barrier can lead to:

- The analyst misunderstanding a customer's issue
- The customer misunderstanding an analyst's instructions
- The customer or the analyst becoming frustrated
- Poor customer satisfaction
- Poor perception of the service desk
- Customers seeking other support routes

1.9.3 Recognize when to seek assistance while supporting a customer whose first language is different from yours

(RoK not exclusive)

Obtain assistance to support a customer whose first language is different from yours when:

- Frustration levels are increasing and the issue has an impact on the organization
- There is little or no understanding between the analyst and the customer
- When the customer requests to speak with someone in the language of their choice

1.9.4 Practice techniques for communicating cross-culturally

(RoK not exclusive)

To communicate more effectively across cultures:

- Use appropriate, standard and simple language (e.g. eliminate slang)
- Moderate the pace and rate of your speech
- Speak clearly and do not shout
- Check your understanding more often than usual
- Let the customer know if you have difficulty communicating with them
- Paraphrase the customer's description of the issue to confirm understanding
- Use an appropriate written communication channel to confirm the conversation
- Use remote support tools
- Thank the customer for their patience

1.9.5 List options for obtaining language assistance

(RoK not exclusive)

Options for obtaining language assistance include:

- Translation services
- The internet
- PC tools
- Translation applications
- An interpreter
- Other service desk staff who understand the customer's language
- Others at the customer's location who understand your language
- Using an alternative language that can be understood by everyone involved

Concept 2 - Analyst Skills

2.1 Communication

2.1.1 Describe the elements of communication

(RoK not exclusive)

The elements of communication include:

- Verbal e.g. speaking
- Non-verbal e.g. using gestures, body language or sign language
- Listening
- Writing
- Reading

2.1.2 Identify how to recognize and meet customer needs

(RoK not exclusive)

To meet customer needs:

- Listen to their spoken and unspoken messages and respond accordingly to ensure their needs are being satisfied
- Ensure that their basic psychological needs are met before addressing their business needs
- Realize that unresolved psychological issues might inhibit problem solving

2.1.3 Describe emotional intelligence

(RoK not exclusive)

Emotional intelligence is the ability to recognize one's own feelings and the feelings of others and to use this skill to guide thinking and behaviors in order make good judgments, take appropriate actions and achieve effective outcomes.

2.1.4 Identify some examples of communication protocols

(RoK not exclusive)

Examples of communication protocols include:

Formal communication:

- The customer's title and family name are used
- The terminology and language used are business orientated
- There is little or no social discussion.

Informal communication:

- The customer's first name is used
- Titles are not used
- Social discussion occurs

2.1.5 Recognize barriers to communication

(RoK not exclusive)

Examples of barriers to communication are:

- Pace and rate of speech that is too fast
- Previous experience with the service desk or customer
- Differences in background, education and training between an analyst and a customer
- Mismatch between the competency levels of the analyst and customer
- Personal problems
- Accent or dialect
- Language
- Temperament
- Asking the wrong questions
- Using inappropriate terminology
- Background noise
- Stress caused as a result of an issue

2.2 Verbal and Non-verbal Communication Skills

2.2.1 Explain the principles of good verbal skills

(RoK not exclusive)

Principles of good verbal skills include:

- Speak clearly and concisely
- Adapt to the customer's communication style to aid understanding
- Minimize ambiguity
- Be professional and use humor appropriately
- Do not use slang
- Avoid verbal tics
- Express appropriate empathy

2.2.2 Explain why adapting to a customer's communication style is important

(RoK not exclusive)

Adapting to a customer's communication style:

- Improves understanding in order to deliver a satisfactory resolution
- Puts them at ease
- Increases their confidence in the analyst and the service desk

2.2.3 Explain how to adapt to a customer's communication style

(RoK not exclusive)

To adapt to a customer's communication style:

- Match their vocabulary
- Use the same level of technical terminology
- Regulate the pace of speech to ensure clarity
- Adopt their level of formality

2.2.4 Identify non-verbal communication skills

(RoK not exclusive)

Non-verbal communication skills include:

- Body language
- Eye contact
- Facial expressions
- Tone of voice

2.3 Listening Skills

2.3.1 Describe paraphrasing and its importance

(RoK not exclusive)

Paraphrasing means to re-state what the customer said in your own words.

Paraphrasing is important because it:

- Shows the customer that they are being listened to and understood
- Gives the customer the opportunity to agree or disagree with the analyst's understanding

2.3.2 Describe the principles of active listening

(RoK not exclusive)

The principles of active listening include:

- Be emotionally and physically prepared to listen
- Minimize distractions
- Do not interrupt and pause before replying
- Document and reference notes
- Acknowledge and focus on the speaker
- Use verbal attends
- Understand the real feelings or intentions behind what is said
- Paraphrase for clarification
- Repeat for verification
- Listen for tone of voice
- Listen for ideas and images, not just words

2.3.3 Explain the benefits of active listening

(RoK not exclusive)

The benefits of active listening include:

- Improved ability of the analyst to identify and address a customer's emotional state
- More effective analysis of issues
- Improved customer satisfaction and experience
- Builds credibility for the analyst and the service desk
- Optimized call time
- Reduced stress for analysts and customers
- Reduced resolution time
- Increased accuracy

2.3.4 Recognize barriers to listening and understanding

(RoK not exclusive)

Barriers to listening and understanding include:

- Speed of thinking
- Outside distractions
- Personal bad listening habits
- Rationalizing
- Omission
- Transformation of detail
- Changing the order of events

2.4 Written Communication Skills

2.4.1 Recognize why using correct grammar and spelling is important in written communications and documentation

(RoK not exclusive)

Using correct grammar and spelling is important because it:

- Reflects well on the organization and the analyst
- Allows data to be reused by knowledge management without extensive editing
- Demonstrates professionalism
- Reduces confusion, misunderstanding and misinterpretation
- Provides clarity for issues being passed to other support teams
- Improves understanding for the reader

2.4.2 Identify the elements required for writing professional business communications and documentation

(RoK not exclusive)

To write effective business communications and documentation:

- Use business style language
- Write clearly and concisely
- Use grammar correctly
- Use punctuation correctly
- Take the time to proof read your communication
- Use single word or short phrase responses (e.g. 'yes' or 'I agree') in accordance with organizational policy

Additionally for E-mail

- Pay careful attention to the distribution list
- Avoid using email for any difficult, sensitive or confrontational issues
- Use plain text and avoid fancy fonts, colors and RTF or HTML specific formatting
- Use standard management approved headers or footers
- Use signature blocks
- Include the original message with replies, but do not forward an email trail with content not designed for others to read
- Never write something that you do not intend to send
- Never write something that you would be uncomfortable with others reading

2.4.3 Identify what to avoid in professional written business communications and documentation

(RoK not exclusive)

For written communications and documentation avoid:

- Acronyms
- Slang
- Negative references about other people or organizations

Additionally, for Email, Short Message Service (SMS), live chat and other collaboration tools avoid:

- SMS (texting) shorthand
- Capitalized words – it is the equivalent of shouting
- Emoticons and emoji

2.5 Questioning Skills

2.5.1 Explain the difference between open and closed questioning

(RoK not exclusive)

The difference between open and closed questions is that:

Open questions:

- Seek elaboration or narrative
- Are intended to draw more information from customers

Closed questions:

- Seek 'yes', 'no', short responses
- Focus the customer
- Are intended to obtain specific information
- Confirm the facts
- Limit the response

2.5.2 Explain the structured questioning technique

(RoK not exclusive)

Structured questioning means to:

- Use prescriptive questions in a certain order to ensure accurate arrival at a specific outcome
- Follow a sequenced string of questions with decision points, to rapidly identify the issue the customer is experiencing

2.5.3 Explain the reflective questioning technique

(RoK not exclusive)

Reflective questions:

- Take some information gathered previously, and use it in a question
- Are designed to provide opportunities for respondents to explore their knowledge, skills experiences, attitudes, beliefs and values

2.6 Problem Solving Skills

2.6.1 Explain the skills required for effective problem solving

(RoK not exclusive)

The skills required for problem solving include:

- Creative thinking
- Inductive reasoning
- Deductive reasoning
- Critical thinking (the ability to analyze and critique in order to redesign, remodel and improve)
- Listen to the issue and gain agreement about the facts
- Know where to find sources of information to aid resolution and action
- Decision making on solutions and options
- Understand and use appropriate escalation and communications procedures
- Understand when it is appropriate to take the initiative and responsibility

2.6.2 List the steps in the problem solving technique

(RoK not exclusive)

The following steps are used in problem solving:

- Identify the problem
 - What is happening
 - Where it is and is not happening
 - When it is and is not happening
 - What did the customer expect
- Gather detailed data appropriately
- Document the problem
- Identify the possible causes of the problem
 - Draw on experience
 - Search the knowledge base
- Prioritize possible causes
- Identify the most probable cause
- Test the most probable cause
- Perform a root cause analysis
- Develop a plan based on the probable cause
- Implement the plan
 - Make one change at a time
 - Minimize the impact to the customer
 - Know how to back out of implemented changes
- Observe and evaluate the results of the plan
- Document how the problem was solved in detail

2.7 Rapport Techniques

2.7.1 Explain empathy

(RoK not exclusive)

Empathy is the ability to recognize the feelings and emotions of others and recognize that they might affect the situation, their behavior or motives

2.7.2 Summarize the benefits of conveying empathy to customers

(RoK not exclusive)

Benefits of conveying empathy include:

- Shows customers that their feelings are recognized and understood
- Develops a rapport with customers
- Increases the likelihood of eliciting the right information from customers

2.7.3 Recognize common customer emotions or actions that an analyst needs to manage

(RoK not exclusive)

Common emotions or actions that an analyst might have to manage include:

- Frustration
- Anger
- Defensiveness
- A judgemental attitude about IT and the service desk
- Irritation
- Impatience
- Fear
- Embarrassment
- Arrogance

2.7.4 Describe methods for acknowledging the customer's emotions

(RoK not exclusive)

To acknowledge a customer's emotions:

- Actively listen
- Offer options
- Advise them that you are familiar with this type of issue
- Allow them to completely share their issue
- Apologize for the inconvenience
- Give them control where appropriate
- Let them know that others have experienced this type of issue

2.7.5 Explain techniques for dealing with negative reactions from customers

(RoK not exclusive)

Techniques for dealing with negative reactions from customers include:

- Maintain a consistent and professional approach
- Use appropriate language
- Understand why the reaction is negative
- Generally use a formal approach
- Avoid the use of emotional or judgemental language
- Aim to reduce emotional levels

2.8 Conflict Resolution and Negotiation Skills

2.8.1 Describe the signs that conflict is developing

(RoK not exclusive)

Signs that conflict is developing include:

- A change in the customer's tone of voice, rate of speech, volume, or communication style
- The customer becomes withdrawn and gives little or no feedback
- The use of words showing emotion such as:
 - Frustrated
 - Angry
 - Annoyed

2.8.2 Identify appropriate actions to reduce and eliminate conflict

(RoK not exclusive)

Actions to reduce and eliminate conflict include:

- Active listening
- Let the customer vent their emotion appropriately
- Refrain from interrupting until there is an opportunity to use a contrived interrupt
- Display empathy appropriately
- Be respectful
- Offer assistance
- Find a resolution or explain the next step
- Remain positive
- Set and manage the customer's expectations
- Use their name

2.8.3 Describe the requirements for successful negotiation

(RoK not exclusive)

The requirements for successful negotiation include:

- Seek a win-win solution (compromise)
- Establish the underlying need
- Separate the person from the problem
- Put yourself in the other person's place
- Acknowledge the benefit of the other person's idea, from their perspective
- Recognize that emotions exist and know how to address them
- Set objective criteria to measure results
- Recognize the different personality types, emotions and motivations of participants

2.9 Contact Management Skills

2.9.1 Describe the principal activities of professionally managing interactions, including calls

(RoK not exclusive)

The principal activities of professionally managing interactions, including calls are:

- Listen to and understand the customer's description of the issue
- Address the emotional needs of the customer (show empathy)
- Use open and closed questions techniques appropriately for clarification and call control
- Speak or write clearly and concisely
- Focus on actions to resolve the customer's issue
- Use silent time effectively (when no resolution work is taking place e.g. a reboot)

2.9.2 Explain the benefits of professionally managing interactions, including calls

(RoK not exclusive)

The key benefits of professionally managing a interactions, including calls are:

- Issues are resolved efficiently
- Talk time is optimized
- Service desk credibility is established
- Customers are kept informed and engaged
- The confidence of the analyst is improved
- Customer confidence in the analyst is improved
- Customer expectations are managed
- A repeatable service is created
- The level of customer satisfaction is increased

2.9.3 Describe and employ the procedure for managing interactions, including calls

(RoK not exclusive)

The procedure for managing interactions, including calls:

- Prepare for the interaction
 - Ensure that all the tools you need are readily available
 - Be physically ready
 - Be emotionally ready
- Greet the customer using a standard greeting if appropriate
- Obtain information from the customer using appropriate questioning skills
- Convey empathy if appropriate
- Be confident
- Resolve the issue
- Close the interaction

2.9.4 Identify the elements of a standard telephone greeting

(RoK not exclusive)

A standard telephone greeting includes:

- Greet the customer appropriately
- State the organization and/or department name e.g. IT service desk
- State your name
- Offer assistance (e.g. how may I help you?)

2.9.5 Explain the benefits of using a standard greeting

(RoK not exclusive)

The benefits of using a standard greeting include:

- Customers immediately know that they have contacted the correct area
- Demonstrates a willingness to help the customer
- Enhances the image of the service desk
- Establishes an atmosphere of trust and respect
- Sets the customer's expectations for the call
- Puts the analyst in control of the call
- There is consistency across the service desk

2.9.6 Explain the benefits of using the customer's name during the call

(RoK not exclusive)

The benefits of using the customer's name during the call include:

- Demonstrates you are listening and giving them personal attention
- Develops a rapport between the analyst and the customer
- Captures the customer's attention
- Contributes to a positive impression of the service desk

2.9.7 Explain techniques for keeping the customer's attention focused on the resolution

(RoK not exclusive)

To keep the customer's attention focused on the resolution:

- Request that they complete the steps with you
- Ask closed questions to direct the conversation
- Encourage them to paraphrase the steps to ensure understanding
- Use the opportunity to improve their skills

2.9.8 Describe actions for managing and redirecting issues related to unsupported items

(RoK not exclusive)

To manage and redirect issues related to unsupported items:

- Maintain a positive service attitude
- Be polite and helpful
- Explain which services are offered and/or supported
- Provide alternatives for resolving the issue within the constraints of the business guidelines
- Know where to route the issue

2.9.9 Explain the behaviors and situations to avoid when interacting with customers

(RoK not exclusive)

The behaviors and situations to avoid when interacting with customers include:

- Asking them to repeat information that has already been documented
- Continuing another conversation while answering a call
- Background noise
- Eating or chewing gum
- Extended hold times
- Multiple transfers
- Using acronyms, slang or terms of endearment
- Placing them on hold without obtaining their consent
- Do not transfer a call without obtaining their consent
- Being drawn into an argument
- Starting another conversation before the call is disconnected

2.9.10 Explain how to use silent time effectively

(RoK not exclusive)

Ways to use silent time include to:

- Complete the current incident or request log
- Build rapport by engaging in informal communication
- Educate the customer
- Review the issue's history
- Communicate information about new releases or service offerings

2.9.11 Describe the correct procedure for placing a customer on hold

(RoK not exclusive)

To place a customer on hold:

- Ask permission
- Provide a valid reason
- Give them the option to be called back if appropriate
- Provide a reasonable time frame for getting back to them
- Realize that the perception of the hold-time is much greater than the actual hold-time
- Give regular updates about the wait-time
- Thank them for holding

2.9.12 Describe the correct procedure for transferring a customer's call

(RoK not exclusive)

To transfer a customer's telephone call:

- Ask permission
- Provide a valid reason
- Provide your contact details in case the call does not transfer
- Explain the circumstances of the call and all relevant information to the receiving person
- Avoid cold transfers (transfers where there is no human handover)

2.9.13 Describe the correct procedure for leaving a voice message

(RoK not exclusive)

To leave a voice message:

- State your name, the date and time of the call and your contact information
- Give a reference number
- State the purpose of the call
- Describe any customer action required

2.9.14 Explain how to manage an abusive customer

(RoK not exclusive)

When dealing with an abusive customer:

- Maintain your professionalism
- Politely warn that you will terminate or transfer the call if the abuse persists
- Inform your manager of the abuse
- Refer to the organization's procedures that reference this type of situation

2.9.15 Explain how to manage an angry customer

(RoK not exclusive)

When dealing with an angry customer:

- Do not interrupt them
- Let them vent
- Show empathy if appropriate
- Recognize that their anger is not personal
- Be respectful
- Offer assistance
- Remain positive

2.9.16 Explain how to manage an inconvenienced customer

(RoK not exclusive)

When dealing with an inconvenienced customer:

- Listen and do not make excuses
- Apologize for any poor service if appropriate
- Take ownership and honor your commitments
- Resolve the issue
- Offer them something extra such as a follow up call or a tip sheet

2.9.17 Explain how to manage an over-talkative customer

(RoK not exclusive)

When dealing with an over talkative customer:

- Wait a reasonable time for them to finish, then use a contrived interrupt
- Acknowledge them and the information provided
- Take control of the conversation
 - Use their name to gain their attention
 - Ask closed questions to gain the required information

2.9.18 Explain how to manage an emotionally distressed customer

(RoK not exclusive)

When dealing with an emotionally distressed customer:

- Use their name
- Empathize with them
- Encourage them to focus on the issue not the emotion

2.9.19 Explain how to manage a customer who is reluctant to close a call

(RoK not exclusive)

To manage a customer who is reluctant to close a call :

- Recognize that they are prolonging contact
- Reassure them
- Use their name
- Ask closed questions
- Clearly summarize how the issue occurred and include the steps taken by both the analyst and the customer to reduce future impact
- Thank them for their time

2.9.20 Describe how to professionally disengage from a support call

(RoK not exclusive)

To professionally disengage from a support call:

- Use the customer's name
- Ask closed questions to lead the customer to closure
- Set the customer's expectation for any follow-up
- Ask if the customer has any other questions
- Thank the customer for calling
- Say goodbye and mean it
- Allow the customer to hang up first

2.10 Stress Management

2.10.1 Describe stress

(RoK not exclusive)

Stress is a state of mental or emotional strain resulting from adverse or demanding circumstances, which can affect both your body and your mind.

Stress is a natural reaction and might have either a positive or negative impact.

2.10.2 List some common causes of stress

(RoK not exclusive)

Some common causes of positive and negative stress:

- Promotion at work
- Learning a new skill
- Starting a new job
- Personal life situations
- Change
- Too much work for available resources
- Not enough time or ineffective use of time
- Lack of skills, knowledge or appropriate training
- Ineffective management
- Money
- No self-confidence
- Insufficient rest

2.10.3 Describe some of the signs of positive and negative stress

(RoK not exclusive)

Some common signs of stress include:

Physical such as:

Negative

- Increased respiration and perspiration
- Redness of face
- Anxious behavior
- Changes in appearance
- Vulnerability to illness

Positive

- Smiling faces
- Friendly chat

Psychological such as:

Negative

- Inability to concentrate
- Over reaction
- Mood swings
- Short tempered or irritable
- Extremely negative or sarcastic/cynical attitude

Positive

- Energy
- Enthusiasm

2.10.4 Describe the responsibility we have to manage stress for ourselves and our colleagues

(RoK not exclusive)

To manage stress for ourselves and our colleagues we have a responsibility to:

- Recognize situations that might cause stress
- Offer help to colleagues who show signs of stress
- Take proactive and positive actions to reduce stress for ourselves and colleagues
- Alert management about anyone showing signs of stress
- Raise concerns about your own stress levels

2.10.5 List actions that reduce stress

(RoK not exclusive)

Some actions that reduce stress are :

- Recognize signs of stress in yourself and others
- Prioritize goals and set realistic expectations
- Manage your time
- Make time for yourself during the working day
- Talk about how you are feeling and your concerns
- Broaden your interests - take up a new sport or hobby
- Use breathing techniques
- Maintain a healthy work-life balance
- Visit a Doctor if symptoms continue or affect your well-being
- Take annual leave
- Take physical exercise

2.11 Time Management

2.11.1 Explain what multi-tasking means in a support environment

(RoK not exclusive)

Multi-tasking in a support environment includes having the ability to:

- Switch tasks frequently
- Handle frequent changes
- Prioritize multiple tasks throughout the day with minimal supervision
- The ability to handle multiple issues, potentially at different stages of their life cycle
- Organize work effectively

2.11.2 List techniques to improve time management

(RoK not exclusive)

Techniques to improve time management include:

- Identify and action the most important items first in accordance with defined priorities
- Prioritize everyday tasks to ensure that you are spending your time on the right tasks
- Continually review and revise routine tasks to improve efficiency
- Accurately estimate and plan how long non-routine tasks take
- Avoid the 'read and defer' cycle
- Use a time management tool
- Document all personal and business tasks in detail
- Use hierarchical escalation when there is a priority conflict that does not fall within a known procedure

2.12 Positive Approach and Attitude

2.12.1 Recognize the differences between assertive, aggressive and passive behavior

(RoK not exclusive)

People who exhibit passive behavior:

- Do not express their needs, opinions or feelings
- Apologize when it is not their fault
- Do not respect their own rights
- Believe they don't have a right to ask for what they want
- Avoid conflict, even when it affects their comfort

People who exhibit aggressive behavior

- Only respect their own needs, opinions, or feelings
- Do not apologize, even when it is their fault
- Do not respect the rights of others
- Believe that others do not have the right to ask for what they want
- Avoid discomfort, even at the risk of conflict

People who exhibit assertive behavior

- Respect their own and other people's needs, opinions, and feelings
- Apologize when at fault, but also allow others to take responsibility for their own actions
- Respect their own rights and the rights of others
- Feel comfortable asking for what they need or want
- Deal with conflict in a mature way

2.12.2 Explain why demonstrating confidence is important

(RoK not exclusive)

Demonstrating confidence:

- Establishes credibility
- Puts the customer at ease and lets them know they are in safe hands
- Encourages customers to return
- Enhances the reputation of the service desk
- Increases customer satisfaction
- Puts the analyst in control of the interaction
- Improves the customer experience

2.12.3 Recognize how confidence is demonstrated

(RoK not exclusive)

To demonstrate confidence:

- Speak with assurance and without hesitating
- Speak using a positive tone of voice
- Use positive language
- Smile and exhibit good posture
- Use available resources
- Admit what you don't know without compromising confidence
- Take ownership of the issue

Concept 3 - Process

3.1 Process Management

3.1.1 Explain process management

(RoK not exclusive)

Process management:

- Designs, implements and maintains processes that are sustainable, measurable and repeatable
- Plans and monitors the performance of a process

3.1.2 Explain process and procedure

(RoK not exclusive)

The definitions of process and procedure are:

- Process - a series of actions or steps taken in order to achieve a consistent and sustainable outcome
- Procedure - the detailed description of the way each action or step in the process is to be carried out

3.1.3 Explain the importance of documenting processes and procedures

(RoK not exclusive)

It is important to document processes and procedures in order to:

- Encourage adherence to processes and procedures for sustainability
- Assist with auditing
- Assist with dispute resolution depending on circumstances
- Clearly define roles and responsibilities
- Allow others to perform tasks when key people are not available
- Assist the service desk in adapting to changes
- Enable knowledge sharing
- Enhance the provision of faster and more accurate resolutions to issues
- Assist in continual service improvement initiatives

3.1.4 Explain the importance of following processes and procedures

(RoK not exclusive)

It is important to follow documented processes and procedures in order to:

- Ensure consistent service delivery
- Improve efficiency, effectiveness and productivity
- Enable new staff to become effective more quickly
- Promote common understanding
- Build the analyst's confidence in their ability to professionally manage a call

3.2 Incident Management

3.2.1 Describe an incident

(RoK not exclusive)

An incident is an unplanned interruption to an IT service or a reduction in the quality of an IT service. Failure of a configuration Item that has not yet impacted service is also an incident; for example, failure of one disk from a mirror set.

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3.2.2 Explain the responsibility and objectives of the incident management process

(RoK not exclusive)

Incident management is the process responsible for managing the lifecycle of all incidents. Incident management ensures that normal service operation is restored as quickly as possible and that business impact is minimized.

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The primary objectives of incident management are to:

- Restore normal service operations as quickly as possible
- Minimize the adverse impact on business operations
- Ensure the best possible levels of service quality and availability are maintained

3.2.3 List the principal activities that the Service Desk and Support Analyst performs in the incident management process

(RoK not exclusive)

The principal activities of the incident management process that Service Desk and Support Analysts perform are:

- Identification
- Log and document incidents
- Categorization
- Prioritization (impact and urgency)
- Initial diagnosis
- Incident matching
- Investigation and diagnosis
- Functional and hierarchic escalation
- Provide other support teams with appropriate and accurate information when necessary
- Communicate status updates to customers
- Resolution and recovery
- Own and monitor incidents throughout the their lifecycle
- Close incidents appropriately
- Notify problem management of potential problems
- Track and report

3.2.4 Explain the benefits of the incident management process

(RoK not exclusive)

The benefits of the incident management process include:

- Reduce the impact of incidents on the business
- Improve staff utilization
- Improve resolution times (reduces down-time)
- Provide consistency to the categorization and prioritization of incidents
- Provide a system wide view of incidents encountered
- Manage an incident from beginning to end
- Help to identify points of failure
- Facilitate proactive communication
- Help to prevent future incidents
- Facilitate continual service improvement
- Assist in the provision of accurate management information
- Assist in the identification of incident trends and work-flows
- Provides a source of data for proactive and reactive problem solving

3.3 Incident and Service Request Recording

3.3.1 Identify the primary reasons for logging incidents and requests

(RoK not exclusive)

The primary reasons for logging incidents and requests are to:

- Create a unique reference number
- Create an audit trail
- Provide information for trend analysis
- Provide information on categories and frequencies
- Provide data to perform a root cause analysis
- Provide data for other team members
- Provide reusable content for the knowledge base
- Help the service desk to create an information check-list or FAQ
- Document the workload of the service desk
- Influence on-going service and process improvement

3.3.2 List the procedure for, and information required, to log an incident

(RoK not exclusive)

The procedure for and information required to log an incident:

- Confirm and log the customer's name
- Confirm the customer's eligibility for or entitlement to service
- Confirm and log the customer's contact information (e.g. phone number and e-mail address)
- Log the service or component affected
- Identify and log the appropriate category
- Identify and log the priority of the incident (based on impact and urgency)
- Confirm the description of the incident's symptoms with the customer and log the facts and details
- Identify and log any special requirements
- Identify and log related incidents, problems or known errors
- Escalate the call to the relevant support team or third party if necessary, inform the customer and update the log
- Log the steps taken and any attempted and successful resolutions
- Resolve the incident or set the customer's expectations for the next contact
- Log the steps to be taken after the call, any commitments made and the next contact date
- Provide the customer with a unique reference number
- Log the resolution time and date
- Log the closure time and date

3.3.3 Explain how to determine the priority of an incident

(RoK not exclusive)

The priority of an incident is determined by:

- The IT service affected and the business impact it is having on the organization
- The urgency of the incident – the speed with which the incident needs to be resolved
- The SLA specification
- The number of people affected
- The service desk's priority allocation operating procedure
- The service desk's ability to provide a workaround (i.e. the ability to find a temporary solution to the incident)

3.3.4 List the steps required to close an incident

(RoK not exclusive)

To close an incident:

- Ensure the customer is satisfied with the resolution/closure details
- Summarize the resolution activity
- Ask if the customer has any other questions
- Thank the customer for contacting the service desk
- Provide the customer with written confirmation that the incident is closed and include details of the resolution if appropriate
- Update the incident log with appropriate information
- Close the incident
- Email a customer satisfaction survey in accordance with the feedback procedure

3.4 Request Fulfillment

3.4.1 Explain the responsibility of the request fulfillment process

(RoK not exclusive)

Request fulfillment is the process responsible for managing the life-cycle of all service requests.

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3.4.2 Describe a service request

(RoK not exclusive)

A service request is a formal request from a customer for information, advice, or a standard change or for access to an IT service i.e. to reset a password, or to provide standard IT services for a new customer. Service requests are managed by the request fulfillment process, usually in conjunction with the service desk. Service requests might be linked to a request for change as part of fulfilling the request.

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3.4.3 Explain the objectives of request fulfillment

(RoK not exclusive)

The objectives of request fulfillment are to:

- Provide a channel for customers to request and receive services
- Offer standard services for which a pre-defined approval and qualification process exists
- Provide information to customers about the availability of services and the procedure for obtaining them
- Source and deliver the components of requested standard services (e.g. licenses and software media)
- Assist with general information, suggestions, complaints or comments

3.5 Escalation

3.5.1 Explain the two types of escalation

(RoK not exclusive)

There are two types of escalation; functional and hierarchic.

- Functional escalation:

Transferring an incident, service request, problem or change to a technical team with the required level of expertise to assist in the resolution

- Hierarchic (management) escalation:

Informing or involving more senior levels of management to assist in the resolution

3.5.2 Identify some circumstances in which escalation is appropriate

(RoK not exclusive)

Functional escalation is appropriate when:

- The analyst does not have the expertise to resolve the issue
- The analyst does not have the permissions, responsibility or authority to resolve the issue
- The support model indicates that this issue should be dealt with by another party
- The time required to work on the issue is prohibitive to service desk support

Hierarchic escalation is appropriate when:

- Customers ask to speak to a manager
- An issue occurs that affects business revenue or reputation
- No existing workaround is available and the issue affects the business
- The issue has a critical impact on the business
- An SLA is about to breach or has been breached

3.6 Status Updates

3.6.1 Explain why the status update procedure is important

(RoK not exclusive)

Keeping customers informed about status changes is important because:

- They feel important and valued
- It demonstrates progress
- Customer satisfaction is improved
- When status updates are completed to a schedule, employee productivity increases and interruptions from customers asking for updates are minimized
- They do not waste time chasing the service desk
- It reduces inbound service desk call volumes
- It helps to exceed their expectations
- It encourages them to use the service desk

3.6.2 List the information to provide in a status update

(RoK not exclusive)

When providing customers with a status update:

- Include the current status
- Include the reference number
- Include the service desk contact details
- Include the next steps or scheduled tasks
- Include the time-frame and the date and time of the next status update
- The agreed call-back time
- Set commitment boundaries that you know you can deliver
- Only make commitments within your control
- Use the service level agreement as the commitment outline

3.7 Problem Management

3.7.1 Describe a problem

(RoK not exclusive)

A problem is a cause of one or more incidents. The cause is not usually known at the time a problem record is created and the problem management process is responsible for further investigation.

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3.7.2 Explain the responsibility of the problem management process

(RoK not exclusive)

Problem management is the process responsible for managing problems throughout their life-cycle in order to:

- To prevent incidents from happening
- To minimize the impact of incidents that cannot be prevented

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3.7.3 Explain the objectives of problem management

(RoK not exclusive)

The objectives of problem management are:

- Minimize the adverse impact of incidents and problems on the business caused by errors in the IT infrastructure
- Prevent the recurrence of incidents related to those errors
- Minimize the impact of incidents that cannot be prevented
- Determine the root cause of incidents and initiate actions to improve or correct the situation

3.7.4 Explain the service desk's responsibilities in the problem management process

(RoK not exclusive)

Although the service desk is not usually responsible for the problem management process, its responsibilities include:

- Highlight to problem management recurring incidents with no long term fix
- Ensure incident information is accurately logged in order to assist problem management to diagnose the underlying cause
- Work with technical teams to diagnose problems when appropriate
- Use knowledge articles to assist with fast resolution of recurring or routine incidents

3.7.5 List the primary activities of the problem management process

(RoK not exclusive)

The activities in the problem management process are:

- Detect
- Log
- Categorize
- Prioritize
- Investigate and diagnose
- Create known error records
- Resolve
- Raise a request for change
- Closure
- Major problem review

3.7.6 List the conditions required for raising a problem record

(RoK not exclusive)

The conditions required for raising a problem record are:

- Multiple occurrences of similar symptoms
- Single occurrences where no workaround or fix can be provided
- Sequence of symptoms is predictable and recurring
- All available resources have been exhausted
- Results of diagnosis indicate an issue with the infrastructure

3.7.7 Explain what is meant by reactive and proactive problem management

IT change management is the process responsible for controlling the life-cycle of all changes enabling beneficial changes to be made with minimum disruption to IT services.

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3.8 IT Change Management

3.8.1 Explain the responsibility of the IT change management process

IT change management is the process responsible for controlling the life-cycle of all changes enabling beneficial changes to be made with minimum disruption to IT services.

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3.8.2 Identify the objectives of change management

(RoK not exclusive)

The objectives of change management are to ensure that:

- Standardized methods and procedures are used for efficient and prompt handling of all changes
- All changes to service assets and configuration items are recorded in the configuration management system
- Unplanned downtime is minimized

3.8.3 List the activities in the change management process

(RoK not exclusive)

Change management activities include:

- Recording
- Acceptance and filtering
- Classification
- Assessment and evaluation
- Business impact assessment
- Approval
- Building, testing and implementation
- Planning and scheduling of changes
- Authorization
- Remediation planning (roll-back/back-out plan)
- Post implementation review

3.8.4 List the types of change

(RoK not exclusive)

The types of change are:

- Standard change - pre-authorized minor change logged and tracked using a service request
- Normal change - follows the defined procedure in the change management process which includes going before the change advisory board (CAB)
- Emergency change - the change management process will normally have a fast track procedure for handling emergency changes

3.8.5 Explain the service desk's responsibilities in the change management process

(RoK not exclusive)

The service desk's responsibilities in the IT change management process are to:

- Log changes as requested
- Participate in the change advisory board (CAB)
- Participate in the assessment of risk as requested
- Be aware of what changes are scheduled in order to identify if they might be the cause of incidents or problems
- Appropriately escalate incidents that might be caused by changes
- Communicate planned system downtime and interruptions to customers
- Halt changes that will negatively impact service delivery

3.9 Service Level Management

3.9.1 Explain the responsibility of the service level management process

(RoK not exclusive)

Service level management (SLM) is the process responsible for negotiating achievable service level agreements and ensuring that they are met. It is responsible for ensuring that all IT service management processes, operational level agreements and underpinning contracts are appropriate for the agreed service level targets. Service level management monitors and reports on service levels, and holds regular service reviews.

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3.9.2 Explain the objectives of service level management

(RoK not exclusive)

The objectives of service level management are to:

- Ensure that IT and its customers have a clear and unambiguous expectation of the level of service to be delivered
- Monitor and report on IT service levels
- Monitor and improve the quality of service delivered in order to increase customer satisfaction

3.9.3 Explain the purpose of a service level agreement (SLA)

(RoK not exclusive)

A service level agreement is an agreement between an IT service provider and a customer. It describes the IT service, documents service level targets, and specifies the responsibilities of the IT service provider and the customer. A single agreement may cover multiple IT services or multiple customers. It is not a legally binding document.

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3.9.4 Identify the typical content of a service level agreement that is relevant to the service desk (SLA)

(RoK not exclusive)

The typical content of an SLA that is relevant to the service desk includes:

- A description of the service
- The service delivery model used
- The types and quality of services provided
- The level of service delivered (e.g. response time and hours of operation)
- Maintenance schedules for IT services
- Charging/costs for IT services
- The methods used for measuring and reporting compliance with the agreement
- The procedure for dealing with conflict between the customer and the service provider

3.9.5 Describe an operational level agreement (OLA)

(RoK not exclusive)

An operational level agreement (OLA) is a documented agreement between an IT service provider and another part of the same organization. It supports the IT service provider's delivery of IT services to customers and defines the goods or services to be provided and the responsibilities of both parties. It is not a legally binding document. For example there could be OLAs:

- Between the IT service provider and a procurement department to obtain hardware in agreed time-scales
- Between the service desk and a support group to provide incident resolution in agreed time-scales

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3.9.6 Describe an underpinning contract (UC)

(RoK not exclusive)

An underpinning contract is a legally binding contract with an external supplier that covers delivery of services to support the IT organization in delivering its services. It includes details of the service deliverables and their overriding performance criteria.

3.10 Service Catalog

3.10.1 Describe a service catalog

(RoK not exclusive)

The service catalog is a database or structured document with information about all live IT services, including those available for deployment. It contains information about customer-facing IT services and the supporting services required by the service provider to deliver them. The information can be displayed in multiple views to suit the requirements of different stakeholders,

3.10.2 List the basic requirements to include for each service in a service catalog

(RoK not exclusive)

The basic requirements to include in a service catalog entry include:

- Service name
- Service owner
- Description of the service
- SLAs and service deliverables in place
- Customers entitled to the service
- How to get support
- Hours the service is available
- Hours the service is supported
- How to get the service if you do not already have it
- IT support team ownership of the various service components
- First-line, second-line and third-line support responsibilities
- Escalation points
- Sources and links to relevant supporting documentation

3.10.3 Describe the objectives of service catalog management

(RoK not exclusive) The objectives of service catalog management are:

- Provide consistent information about agreed services to authorized persons
- Ensure that the catalog is produced and maintained
- Ensure that the catalog contains accurate information about status, interfaces and other dependencies for all operational services and for those being prepared for operation

3.11 Service Delivery Models

3.11.1 List the various service delivery options using different types of sourcing

(RoK not exclusive)

The various service delivery options using different types of sourcing are:

- Internally retained - a service delivered entirely by an internally retained IT organization
- Insourced
- Re-establishing an internally resourced service following previous outsourcing
- Increasing the scope of the internally resourced service desk
- Outsourced - a service delivered entirely by an externally contracted organization e.g. Managed Services Provider (MSP)
- Co-sourced - a service delivered as a joint venture between two separate organizations
- SIAM (Service Integration and Management) - an approach for managing and integrating multi-sourced and co-sourced services

3.12 Knowledge Management

3.12.1 Explain the responsibility and purpose of the knowledge management process

(RoK not exclusive)

Knowledge management is the process responsible for gathering, analyzing, storing and sharing knowledge and information within an organization.

The primary purpose of knowledge management is to improve efficiency by reducing the need to rediscover knowledge.

3.12.2 Explain why knowledge management is important to a service desk

(RoK not exclusive)

Knowledge management is important to the service desk to:

- Provide a framework for collaboration
- Provide knowledge for customers and service desk staff
- Reduce training time for new service desk staff
- Increase productivity
- Develop rapport and establish credibility between the various teams supporting the customers
- Provide the customer with correct, consistent and current information
- Reduce the dependency on second and third-line technical staff to rediscover resolutions
- Lower the overall cost of support

Note: Might increase the speed of resolution

3.12.3 Describe why it is important to maintain knowledge

(RoK not exclusive)

Maintaining knowledge ensures that the service desk has timely access to relevant, up-to-date and appropriate information.

3.13 Information Security Management

3.13.1 Explain the responsibility of the information security management process

(RoK not exclusive)

Information security management is the process responsible for ensuring that all of an organization's data is protected such as:

- Personal data
- Corporate data
- Financial data
- Intellectual properties
- Access to facilities

3.13.2 Recognize the importance of information security policies

(RoK not exclusive)

It is important to have information security policies in place in order to:

- Protect the organization and customer from unauthorized access
- Protect data integrity
- Protect corporate assets
- Ensure compliance with legal requirements
- Address security with third parties (suppliers)
- Ensure staff are aware of their responsibilities regarding security
- Ensure that information security management is designed into services, processes, and procedures

3.13.3 Explain the service desk's responsibilities in the information security management process

(RoK not exclusive)

The service desk's responsibilities in the information security management process include:

- Confirming the identity of customers
- Password resets
- Login resets
- Requests for access
- Advising on the correct use of IT in relation to the IT security policy
- Informing the security manager of any security breaches

3.13.4 Recognize potential security threats to the organization that might occur through the service desk

(RoK not exclusive)

Potential security threats to the organization include:

- Phishing/spoofing
- Vishing
- Social engineering
- Malicious software
- Bogus callers
- Identity fraud
- Manipulation
- Scam mail
- Fraudulent gathering of information

3.13.5 Identify types of security policies

(RoK not exclusive)

Security policies include:

- Password reset requirements
- Compliance with international/regional regulatory and legislative requirements
- Access rights to information
- Physical access to facilities
- Internet access
- E-mail policies
- Anti-virus
- Firewall
- Remote access
- Data leakage mitigation
- Mobile device security

3.13.6 Explain the importance of reporting security compromises

(RoK not exclusive)

Reporting security compromises:

- Protects the organization and the customer
- Identifies the offender
- Alerts customers to possible security threats
- Helps in the resolution of security incidents
- Protects the organization's reputation

3.13.7 Explain the importance of legal compliance

(RoK not exclusive)

Legal compliance:

- Protects identity information
- Protects the organization's assets
- Protects the organization from legal liability
- Includes notifying management about legal questions

3.13.8 Explain the importance of software license management

(RoK not exclusive)

It is essential to maintain an inventory of all software licensed by the organization in order to:

- Identify software that is over or under-licensed in order to manage costs by cancelling or reallocating unused licenses
- Avoid penalties for non-compliance of software licensing agreements

3.13.9 Recognize the importance of confidentiality

(RoK not exclusive)

Confidentiality:

- Protects the customer and organization from theft and/or information abuse
- Protects the customer from any embarrassment
- Supports the organization's legal compliance requirements

3.14 IT Service Continuity Management

3.14.1 Explain the responsibility of the IT service continuity management process

(RoK not exclusive)

IT service continuity management (ITSCM) is the process responsible for managing risks that could seriously impact IT services. ITSCM ensures that the IT service provider can always provide minimum agreed service levels, by reducing the risk to an acceptable level and by planning for the recovery of IT services.

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3.14.2 List the key components of an IT service continuity management plan

(RoK not exclusive)

The key components of an IT service continuity management plan include:

- What services are most critical to the organization
- How the service desk will maintain critical services to customers with minimal disruption to them
- How to eliminate single points of failure
- The provision for both short and long-term countermeasures to reduce the impact of disasters (these need to be tested on a regular basis)
- What information and services customers need to have in place in order to access the services they require

3.15 Quality Management

3.15.1 Explain the responsibility of the quality assurance (QA) process

(RoK not exclusive)

Quality assurance is the process responsible for ensuring a product, service or process is fit for purpose and that it continues to provide its intended value, in order to identify areas for improvement for the service desk and for individuals.

3.15.2 List the common QA practices used by a service desk

(RoK not exclusive)

Common QA practices used by a service desk include:

- Monitoring
 - Call and other interaction monitoring
 - Incident and request monitoring
 - Key performance indicator monitoring
 - Knowledge monitoring
- Customer satisfaction
- Employee satisfaction
- Round tables
- Focus groups

3.15.3 Identify methods for monitoring calls and other interactions

(RoK not exclusive)

Examples of methods for monitoring calls and other interactions include:

- Live service observations, where a reviewer sits with the analyst and listens in on the call or reviews the interaction
- Remote service observations in which a reviewer monitors live interactions where the analyst is not aware that the interaction is being evaluated
- Call and interaction recording and evaluation e.g. live chat filming or call recording
- Follow-up calls
- Customer satisfaction surveys
- Software designed to evaluate interactions in an automated environment
- Voice analytic software

3.15.4 Describe what is meant by incident and request monitoring

(RoK not exclusive)

Incident and request monitoring is a formal review of the incident and service request data recorded in the service management system in order to ascertain whether the relevant information has been collected and documented and acted on, and if appropriate, in accordance with the service level agreement (SLA) or service targets.

3.15.5 Identify methods for monitoring incidents and requests

(RoK not exclusive)

Examples of methods for monitoring incidents and requests include:

- Regular reviews of the service management system logs
- Regular reviews of the audit trails of all communication channels used

3.15.6 List the benefits of interaction, incident and request monitoring

(RoK not exclusive)

Incidents and requests are monitored in order to:

- Ensure that the documented incident or service request process is followed
- Validate the information provided to the customer
- Provide feedback to analysts about job performance
- Provide a coaching opportunity by identifying strengths and weaknesses of individuals
- Identify areas where processes or service delivery issues are not meeting expectations or where they are not being followed up
- Identify areas where analysts might need training
- Provide an opportunity to identify areas for improvement
- Assist the service desk to be proactive
- Improve service quality

3.16 Customer Satisfaction Surveys

3.16.1 Explain the purpose and objectives of customer satisfaction surveys

(RoK not exclusive)

The purpose of conducting customer satisfaction surveys is to determine customer perception of the products and services that the IT organization and the service desk deliver, and to determine whether they are meeting customer expectations.

The objectives are:

- Identify what customers feel is important
- Identify areas for improvement
- Benchmark and trend customer satisfaction
- Assist in developing new products and services based on customer needs

3.16.2 Describe the three most common types of surveys and the importance of each type

(RoK not exclusive)

On-going (event) surveys:

- Are completed as soon as possible after an interaction is closed; are typically short and can be completed quickly
- Measure the quality of a single interaction, incident or request
- Are used to trend customer satisfaction between annual surveys and measure the impact of changes in processes, procedures, products or services
- Might use net promoter score customer loyalty metric "How likely is it that you would recommend our company/product/service to a friend or colleague?"

Annual or periodic surveys:

- Are planned and scheduled on a periodic basis (normally annually)
- Are used to evaluate overall satisfaction levels with the service desk's products, service offerings and staff
- Identify changes to processes, procedures, products or services that customers feel would improve their relationship with the service desk and meet their needs better
- Are based on the customer's perception of the service desk over the last year or period

One-time or one-off surveys:

- Are not scheduled at regular intervals
- Are scheduled for a specific reason
- Are appropriate for evaluating satisfaction levels with current or new products and service offerings
- Are appropriate for identifying changes that customers feel are important

3.17 Service Desk Metrics and Statistics

3.17.1 Explain the reason for compiling service desk metrics

(RoK not exclusive)

Metrics are standard measurements by which efficiency, performance, progress, or the quality of a plan, process, or product can be assessed. When combined together they can demonstrate the value of the service desk, and identify where potential service improvements can be implemented.

3.17.2 Identify common service desk metrics

(RoK not exclusive)

Common metrics include:

- Average time to respond
- Abandon rate
- First contact resolution rate
- First level resolution
- Percentage of incidents resolved within service level agreement
- Percentage of re-opened incidents
- Average resolution time by priority
- Average resolution time by category
- Customer satisfaction statistics
- Employee satisfaction statistics

Concept 4 - Supported Technologies and Enabling Tools

4.1 Service Desk Infrastructure

4.1.1 List common technologies used by the service desk

(RoK not exclusive)

Common technologies include:

- Telephony systems
 - Automated Call Distribution (ACD)
 - Voice-over-Internet Protocol (VoIP)
 - Computer Telephony Integration (CTI)
 - Voicemail
 - Interactive Voice Response (IVR)
 - Automatic Voice Recognition (AVR)
 - Short Message Service (SMS)
 - Call management (reporting)
- IT Service management (ITSM) toolsets that facilitate the execution of some or all of these processes:
 - Incident management
 - Problem management
 - Change management
 - Service level management
 - Configuration management
 - Knowledge management
 - Service catalog management
 - Event management
 - Release and deployment management
- Other tools used to support activities such as:
 - Workflow control
 - Remote access
 - Request portals
 - Reporting
 - Collaboration
 - Infrastructure discovery
 - Auto-provisioning
- Internet technology
 - Remote support tools
 - Collaboration tools e.g. Instant Messaging (IM)
 - Self-service
 - Live chat
 - Social media
 - Cloud services
 - Digital channels using mobile devices
- Voice authentication
- Self-healing

- E-mail management
- Broadcast systems such as monitor boards
- Event monitoring and alerting systems
- Gamification
- Incident detection systems\pro-active alert or monitoring systems
- Wireless devices

4.1.2 Identify methods used for delivering service and support

(RoK not exclusive)

Methods used for service and support delivery include:

- Assisted service
 - Telephone
 - Desk side
 - Electronic - for example
- Remote control
- E-mail
- Collaboration tools
- Social media
- Self-service portal
 - On-line-logging
 - Incident and service request tracking
- Self-help for example:
 - FAQs
 - Knowledge bases
 - Automated password resets
- Interactive Voice Response (IVR)
- On-line documentation, tutorials

4.1.3 Explain the advantages of remote support

(RoK not exclusive)

Remote support has the following advantages:

- Customers' devices are visible to the analyst
- It is time effective
- Faster diagnosis and resolution of issues
- Fewer issues are escalated, which improves first contact resolution
- Provides an opportunity for training customers to be self-sufficient
- May offer a better customer experience, which improves satisfaction

4.1.4 Recognize common disadvantages of remote support

(RoK not exclusive)

Common disadvantages of remote support are:

- Security
- Insufficient bandwidth
- Access conflicts
- Silent time
- Over dependence by customers and analysts reducing skills over time
- Customers might feel excluded unless they are kept verbally informed of the steps being taken during the remote support session

4.1.5 Recognize the benefits of using live chat and collaboration tools

(RoK not exclusive)

The benefits of using live chat and collaboration tools include:

- Provides customers and other service desk staff with another channel of communication
- Negates the effect of misunderstanding the accents of analysts from overseas desks or customers
- Nurtures relationships with remote colleagues and customers
- Provides an alternative digital dialogue

4.2 Computing

4.2.1 List basic network components

(RoK not exclusive)

Basic network components include:

- Servers
- Hubs/switches
- Routers
- Virtual Private Networks (VPN)

4.2.2 Explain the difference between a personal computer and a thin client

(RoK not exclusive)

A personal computer is any general-purpose computer built around a microprocessor. Its size and capabilities are designed for use by an individual and it is intended to be operated directly by an end-user, possibly over a network.

The most common type of thin client is a low-end computer terminal which concentrates solely on providing a graphical user interface to the end-user. The remaining functionality, in particular the operating system and application software, is provided by the server.

4.2.3 Explain the meaning of cloud computing, Software-as-a-Service (SaaS), Infrastructure-as-a-Service (IaaS) and Platform-as-a-Service (PaaS)

(RoK not exclusive)

Cloud computing is a generic term for Internet based access to technology enabled services.

The three key cloud delivery models are:

- Infrastructure-as-a-Service (IaaS) - offers pay-as-you-go access to servers, disk space and networks
- Platform-as-a-Service (PaaS) - provides a pre-built infrastructure (platform) for applications to be deployed directly by the end-user
- 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

4.3 Telephony

4.3.1 Describe the purpose of an Automatic Call Distributor (ACD) and IP Telephony

(RoK not exclusive)

ACD – is a device that routes calls based on predefined processes and algorithms.

IP (Internet Protocol) telephony - is a technology that supports voice, data and video transmission via IP-based LANs, WANs, and the internet. This includes VoIP (Voice over Internet Protocol).

4.3.2 List common automatic call distributor (ACD) features

(RoK not exclusive)

Common ACD features include:

- Call distribution
 - Skills-based
 - First available, longest available
- Call queuing
- Advanced reporting
 - Analyst availability tracking
 - Number of calls to the service desk
 - Average speed to answer (ASA)
 - Abandon rate
 - Hold time
 - Talk time
 - Call frequency

4.3.3 Describe Computer Telephony Integration (CTI)

(RoK not exclusive)

Computer Telephony Integration (CTI) is the integration of IT (data) and telephony equipment.

- Identifies customers to the analyst (e.g. populates the screen with customer contact details)
- Allows for viewing of customer management statistics and reporting data across multiple platforms in real time
- Applies business rules for delivering personalized service, (i.e., route to a specific individual or team)

4.4 Self-Service

4.4.1 Describe self-service

(RoK not exclusive)

Self-service provides customers with the facilities needed to manage their service desk interactions and to find answers to common issues (self-help).

4.4.2 Identify the benefits of IT self-service

(RoK not exclusive)

The benefits of using self-service as a service delivery method include:

- Is available 24x7, regardless of the service desk's operating hours
- Relieves pressure on the service desk
- Offers an alternative channel for obtaining support
- Lowers the cost of support
- Provides easy access for customers
- Automatically updates customers with information about their current incidents or service requests
- Allows customers to check the status of their current incidents or service requests
- Support resources can focus on other issues

4.4.3 Identify the benefits of self-help technology

(RoK not exclusive)

- Allows customers to resolve simple issues without the assistance of an analyst (e.g. password resets, adding printers)
- Provides cost effective, consistent solutions for repetitive issues
- Offers faster resolution of issues
- Enables customers to be more independent and self-sufficient
- Potential to improve customer satisfaction and productivity
- Provides customers with access to on-line documentation (e.g. processes, policies, procedures, SLAs and FAQs) training and tutorials
- Empowers customers and might improve their experience

4.4.4 Identify disadvantages of self-help technology

(RoK not exclusive)

Disadvantages of self-help technology include:

- Inaccurate and irrelevant information
- Higher cost of information maintenance
- Challenging to keep up-to-date
- Possible perceived loss of personalized service
- Might take longer to resolve issues negatively impacting the customer experience

4.4.5 List common examples of self-help

(RoK not exclusive)

Examples of self-help include:

- IVR/AVR-based systems
- Password resets
- Knowledge bases
- Application web-based help systems
- Application in-built self-help systems
- FAQs
- Fact sheets
- On-line training/tutorials
- On-line knowledge base

4.5 Self-Healing Technology

4.5.1 Describe self-healing tools

(RoK not exclusive)

Self-healing tools identify when a problem has occurred and initiate remedial/corrective action to restore a system to a functioning state.

4.5.2 List common examples of self-healing technology

(RoK not exclusive)

Common examples of self-healing tools include:

- Anti-virus
- Scandisk
- Event/alert monitoring and diagnostic tools

4.5.3 Identify the benefits of self-healing technology

(RoK not exclusive)

Key benefits of self-healing technology include:

- Reduced cost of support
- Reduced need for reactive support
- Improved utilization of IT staff
- Increased productivity
- Automated system recovery or workarounds
- Higher availability of services
- Reduced resolution time for some incidents
- Seamless service provision

4.6 Social Media

4.6.1 Describe what is meant by social media

(RoK not exclusive)

Social media is the use of technology combined with social interaction in order to create on-line communities, share knowledge and connect people to information faster using internet-based communication.

- It comprises primarily internet and mobile based tools using words, pictures, audio and video
- It transforms people from content consumers into content producers
- It enables organizations to build stronger relationships with customers and markets

4.6.2 Explain how to use social media tools effectively

(RoK not exclusive)

To use social media tools effectively in business:

- Recognize the difference between traditional media and social media
- Follow the organization's strategy for engaging with its market
- Build communities in order to share knowledge
- Be an ambassador for the organization's brand
- Be transparent
- Analyze content

4.6.3 List the dos and don'ts of using various social medial options

(RoK not exclusive)

Important issues to consider when using social media tools are:

DO

- Follow the organization's policy on social media and its associated guidelines
- Be familiar with the culture of appropriate social media communities
- Be original and keep the content interesting, entertaining, relevant and honest
- Be responsible for what you communicate; exercise good judgement
- Remember everything you contribute reflects on your organization
- Only use social media tools authorized by your organization
- Always communicate in a respectful and courteous manner
- Communicate in a human voice; it's all about people engaging with people
- Respect the opinions of others when sharing and collaborating
- Focus on listening before communicating
- Respect confidentiality, copyrights and trademarks
- Ask advice from your manager if you are unsure

DONT

- Spam on social sites
- Overwhelm followers too frequently, with too much information, or with the same information
- Reply or make comments on behalf of the organization without following its social media guidelines
- Use bad or antisocial language
- Feel pressured to make friends with someone on-line, in business or a personal capacity

EFFICIENCY EXCELLENCE
WORLD CLASS LEARN SUCCEED
ADDED IMPROVE LEARN
EXCELLENCE SERVICE
WORLD CLASS BEST PRACTICE
CONTINUAL SERVICE IMPROVEMENT EFFICIENCY BEST PRACTICE VALUE ADDED
EFFICIENCY SERVICE **SUCCEED** **WORLD CLASS**
VALUE ADDED EXCELLENCE SERVICE LEARN
QUALITY SERVICE QUALITY LEARN SERVICE EFFICIENCY
SUCCEED VALUE ADDED BEST PRACTICE
EXCELLENCE LEARN EFFICIENCY IMPROVE EXCELLENCE
EXCELLENCE CONTINUAL SERVICE IMPROVEMENT
IMPROVE EFFICIENCY BEST PRACTICE LEARN
QUAL SERVICE IMPROVEMENT LEARN SERVICE SUCCEED QU
BEST PRACTICE EXCELLENCE **SUCCEED** SERVICE SUCCEED EXCELLENCE