

Professional Standard **Service Desk Manager**



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SDI® Service Desk Manager Standard v6.0

Professional Standard **Service Desk Manager**

SDI® Service Desk and Support Manager (SDM) Qualification Standard

This document contains the SDI Service Desk and Support Manager (SDM) 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 standard is published in order to allow organizations to use it to improve their services, for individuals to study the standard in preparation for an exam, and for training and consulting providers to develop offerings that align with the standard.

International - means that a committee of professionals with international experience and/or who work for global companies has developed the standard, and that the standard is recognized in the global market.

Industry - refers to the service and support industry, which initially focused on internal support of information technology and later expanded to include external support organizations and shared service desks.

Standard - defines the knowledge that a support professional in a specific role is expected to know, and a set of best and common processes and practices within a service desk.

SDI is committed to defining standards for additional support professional roles as the industry evolves and its needs change. In business today, customers want educated and qualified professionals to support their business needs. SDI qualifications provide:

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

Purpose

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

The competencies required for each SDI qualification were identified and approved by 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 to recognize the breadth of knowledge required to successfully fulfill the role
- Document the necessary skills
- Provide a mechanism to recognize and develop the breadth of knowledge required for developing individuals aligned to international industry standards
- Provide leadership to the IT support industry by providing a recognized qualification in IT customer service and support

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

Qualification Objectives

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

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

Name of the Qualification

SDI Service Desk Manager (SDM)

Target Demographics

The SDM qualification course is for existing and aspiring service desk managers and supervisors who wish to develop their understanding of service desk management practices and build a set of management skills. This course is suitable for those with at least three years' experience in a service desk environment. Examples of professional job titles include.

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

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

Prerequisites for Taking the Exam

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

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

Qualification Structure and Weighting

Concept	SDM Weighting %
The Strategic Role of The Service Desk	15
Management Competencies	20
Business Integration	10
Operational Management	25
Tools and Technologies	5
Human Resource and Team Development	25
	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 of customers and users

Concept 1 - The Strategic Role of the Service Desk

1.1 The Service Desk

1.1.1 Describe the role of the service desk

(Range of Knowledge (RoK) not exclusive)

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

1.1.2 Explain the activities of the service desk

(RoK not exclusive)

The activities of the service desk are to:

- Deliver services that achieve expected business outcomes in line with organizational objectives
- Demonstrate its value and contribution to the organization
- Identify and initiate service improvement initiatives
- Set the standard of behavior for customer engagement
- Manage customer expectations
- Follow the organization's policies, processes and procedures
- Balance support expenses to keep IT support performing at the optimum levels of quality and cost effectiveness
- Provide customers with a first contact resolution where 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
- Be aware of appropriate societal and environmental issues and responsibilities relating to the service desk
- Adhere to, monitor and support the organization's security policies/requirements
- Manage compliments, complaints and suggestions relating to IT service issues
- Represent the IT organization to its customers

1.1.3 Describe the characteristics of a successful service desk

(RoK not exclusive)

The characteristics of a successful service desk include:

- Leadership - there is clear direction and strong management
- Consistency - support services that meet the organization's business needs are delivered consistently
- Commitment to quality - quality improvement programs are undertaken such as benchmarking and certification to industry/organizational standards/programs
- Policy and strategy - policies are documented, adhered to, regularly reviewed and monitored
- People management - roles and responsibilities are clearly defined
- Resources - resource management and capacity planning are in place
- Value - it is acknowledged by stakeholders as being a critical component of the IT service value chain
- Processes - integrated service management processes are in place and are regularly reviewed
- Employee satisfaction - regular service desk employee satisfaction measures are in place
- Customer satisfaction - regular customer satisfaction surveys are in place
- Performance results - regular performance metrics are produced, analyzed and achieved in order to identify opportunities for improvement, such as:
 - KPIs
 - Operational metrics
 - Unit costs
 - Total costs
- Customer experience - processes are in place for building strong customer relationships and loyalty
- Credibility - is respected by customers and the entire support organization

1.2 Vision and Mission Statements

1.2.1 Describe the purpose and objectives of a service desk vision statement

(RoK not exclusive)

The purpose of a service desk vision statement is to provide a longer term view of what the service desk wants to become.

The objectives include to:

- Promote the image of the service desk
- Ensure that all staff understand the vision and that they consistently work towards achieving it
- Encourage staff to develop skills that support the vision

1.2.2 Describe the purpose of a service desk mission statement

(RoK not exclusive)

The purpose of having a service desk mission statement is to define the service desk's reason for existing clearly and simply. It should be regularly reviewed to ensure that it demonstrates commitment to the organization's vision and is aligned with its business goals. It should be supported by appropriate critical success factors and key performance indicators.

1.2.3 List the content of a service desk mission statement

(RoK not exclusive)

A service desk mission statement should include:

- A purpose statement - what the service desk is aiming to achieve (what you want to do and why)
- Underpinning objectives - the business practices required to achieve the mission
- The expected standard of performance

1.2.4 Explain the objectives of a service desk mission statement

(RoK not exclusive)

The objectives of a mission statement include to:

- Identify the main purpose and role of the service desk
- Align support goals with the organization's goals
- Inspire commitment and buy-in to the service desk

1.3 Service Desk Best Practices

1.3.1 Explain the concepts of good practice and best practice

(RoK not exclusive)

Good practice - a collection of specific methods that identify the accepted common way of doing something. Sources of good practice include standards, frameworks, proprietary knowledge (intellectual property) of individuals and organizations and are supported by complementary guidance for particular industry sectors.

Best practice - a technique or methodology that has consistently shown results superior to those achieved using other means and that is used as a benchmark.

1.3.2 Identify some business standards, best practices and methodologies relevant to the service desk

(RoK not exclusive)

Common business standards and best practices relevant to the service desk include:

- Formal standards relating to IT best practice, such as:
 - ISO/IEC 20000 - IT Service Management
 - ISO 9000 - Quality Management Systems
 - ISO/IEC 27001 - Security Management Systems
 - ISO/IEC 15504 - IT Process Assessment
 - ISO 14000 - Environmental Management
 - ISO 22301 - Business Continuity Management
 - IT4IT Reference Architecture - an operating model to manage the business of IT
- Formal IT governance and audit assessment standards, such as:
 - COBIT® - The Control Objectives for Information and Related Technology
 - ISO/IEC 38500 - Corporate governance of information technology
 - SDI® Service Desk Certification (SDC)
- Industry good/best practice models and methods, such as:
 - CMMI - Capability Maturity Model Integration
 - SFIA - Skills Framework for the Information Age
 - Agile - software development methods
- Methodologies relevant to service management such as:
 - DevOps - A collaborative agile approach to building and running services
 - ITAM - Information Technology Asset Management
 - SIAM - Service Integration and Management
 - ITIL®
 - SDI® Individual Certification
- Formal business best practice quality models such as:
 - EFQM Excellence Model
 - Six Sigma - techniques and tools for process improvement
 - TQM - Total Quality Management
 - Kaizen - philosophy for continuous improvement

1.3.3 Explain the purpose of following a formal industry standard or good/best practice

(RoK not exclusive)

The purposes for following a formal industry standard or good/best practice are to:

- Meet IT governance
- Meet industry-sector regulatory requirements
- Demonstrate compliance by providing appropriate supporting evidence

1.3.4 Explain the benefits of following best practice

(RoK not exclusive)

The benefits of following best practice include:

- Increased consistency and accountability
- Improved governance
- Reduced business risk
- Greater control of IT infrastructure
- Areas for improvement are identified
- Improved efficiency
- Costs are maintained and managed effectively
- Increased employee morale
- Increased customer satisfaction
- Commitment to quality is demonstrated
- Improvement development time is reduced by using proven processes and approaches
- Achieving certification demonstrates tangible evidence of following best practice

1.4 Global Service Desk Perspective

1.4.1 Recognize the challenges of managing a global service desk

(RoK not exclusive)

A global service desk perspective requires an awareness of:

- Different time-zones
- Language support
- Cultural differences
- Differences in working methods
- Services alignment
- Local currency
- Public holidays
- Legal requirements and local governance, such as software licensing implications and equipment disposal

1.5 Service Ethics

1.5.1 Explain the purpose of a code of conduct

(RoK not exclusive)

The purpose of a code of conduct is to:

- Manage the organization's risk
- Document expected behaviors to ensure that staff understand what the organization expects of them
- Document the organization's standards of moral and ethical behavior
- Serve as a source of clarity for employees where there is vague or questionable areas of behavior
- Merge and align behavior with the organization's values
- Prevent litigation
- Define the benchmark for professional behavior

1.5.2 Summarize the effects of working within a code of conduct

(RoK not exclusive)

A code of conduct:

- Facilitates identification of potential risks to the organization by responding to areas of behavior that need addressing
- Provides a means to leverage the organization's brand to build credibility and reputation for competitive advantage
- Instills values in order to improve the customer experience
- Encourages professional behavior

1.5.3 Recognize the effect of honoring commitments made to customers, team members, and the organization

(RoK not exclusive)

Honoring commitments made to customers, team members, and the organization improves:

- The customer experience
- Customer satisfaction
- Trust
- Credibility
- Employee morale
- Accountability

1.5.4 Describe the typical experience that customers expect

(RoK not exclusive)

Typically, customers expect:

- Their issues to be resolved within the agreed timeframe
- Consistent and courteous service
- The service desk to take ownership of and be responsible and accountable for their issue, regardless of who they speak to
- For their expectations to be managed in a professional manner
- Timely information and advice about deviations from agreed action plans
- Standard business language to be used not technical jargon
- To be provided with good decision making data and feedback
- An opportunity to provide feedback about the service delivered
- Value for money

1.6 Social Responsibility

1.6.1 Explain how the service desk can actively demonstrate its commitment to the organization's social responsibility policy

(RoK not exclusive)

Areas where the service desk can actively demonstrate its commitment to a social responsibility policy include:

- Power saving
- Complying with relevant environmental and recycling policies and legislation
- Ensuring health and safety guidelines are followed
- Participating in community and charitable projects
- Using environmentally friendly products wherever possible

Concept 2 - Management Competencies

2.1 The role of the Service Desk and Support Manager

2.1.1 Demonstrate the skills required to be an effective Service Desk and Support Manager

(RoK not exclusive)

The skills required to be an effective Service Desk and Support Manager include:

- People-management and team building
- Strategic planning capability (direction-setting)
- Tactical planning capability (short term activities)
- Demonstrable knowledge of relevant industry standards
- Demonstrable knowledge of service management best practices
- Excellent communication and influencing
- Marketing and selling ability in order to promote the service desk
- An understanding of how IT and IT service management works
- A good understanding of the customer's business
- The ability to question what is done and why in order to drive continual service improvement programs
- Coaching
- Time management
- The ability to lead by example

2.1.2 Describe the routine responsibilities of a Service Desk and Support Manager

(RoK not exclusive)

The Service Desk and Support Manager's routine responsibilities include to:

- Achieve delivery targets for customer service and support performance
- Promote the service desk to the customer base
- Promote the service desk and service processes
- Staff welfare, development and training
- Service reporting and operational performance reviews
- Ensure that processes and procedures used by the service desk are documented, regularly audited and continually improved
- Liaise with the organization's senior management to promote the service desk as a core business asset
- Stakeholder management e.g. the team, other teams and customers
- Be aware of the financial management and the costs associated with running a service desk

2.1.3 Describe the strategic responsibilities of a Service Desk and Support Manager

(RoK not exclusive)

The Service Desk and Support Manager's strategic responsibilities include to:

- Define and implement service desk strategy that supports the organization's business strategy
- Understand the desired/expected role of the IT service desk in supporting the organization's strategic plans
- Recognize the IT service desk activities required to support the organization's strategic plans
- Communicate the relationship between the IT service desk and the strategic plans of the organization

2.1.4 Explain the importance of documenting processes and procedures

(RoK not exclusive)

Documenting processes and procedures:

- Ensures consistent, effective and efficient service
- Creates a productive and self-sufficient environment
- Makes the induction process easier
- Allows others to perform tasks when person responsible for the role is unavailable
- Encourages adherence to processes and procedures
- Builds analysts' confidence for professional call management

2.2 Business Knowledge

2.2.1 Explain business and IT integration

(RoK not exclusive)

Business and IT integration means to use information technology service management (ITSM) processes and approaches to support the integration of IT services with the organization's stated business requirements.

2.2.2 Explain strategic awareness

(RoK not exclusive)

Strategic awareness means to:

- Be able to articulate the strategic goals, objectives and key business processes of the organization being supported
- Know how and where to acquire knowledge of the organization's strategic plans
- Interpret the intention of the strategic plans of the organization and apply them to the service desk
- Know how IT services contribute to meeting the organization's goals

2.2.3 Recognize opportunities for greater participation in strategic decisions

(RoK not exclusive)

Opportunities for greater participation in strategic decisions include:

- Take a proactive approach to developing and supporting strategic initiatives
- Participate in management decision making
- Demonstrate business vision, insight and judgement
- Be involved in finding and developing new business opportunities

2.3 Strategic Development

2.3.1 Develop strategies aligned to the organization's objectives and stated outcomes, that are designed to take advantage of business opportunities

(RoK not exclusive)

In order to develop clear, insightful strategies:

- Develop well-defined service desk goals and objectives that support business and IT goals
- Network with people within the organization, in the support industry, and in wider communities
- Build close relationships with second and third-line support teams, other service providers and the wider industry
- Undertake forward planning/brainstorming sessions with your team to identify opportunities to be involved in business development activities
- Undertake an assessment, or current state analysis (CSA), including a SWOT/GAP analysis of the service desk
- Regularly communicate the vision and strategy on an ongoing basis and request feedback
- Research available media to obtain strategic management guidance
- Communicate how the service desk assists the organization to meet its business objectives

2.3.2 Identify the activities required to obtain support from critical resources and remove barriers

(RoK not exclusive)

To obtain support from critical resources and remove barriers:

- Ensure objectives are presented in the appropriate context and language
- Obtain tangible, ongoing and practical management and inter-departmental support
- Ensure that projects have formal status, for example:
 - They are costed
 - Contain a written business case
 - Have allocated resources
- Develop messages that address the concerns of stakeholders to demonstrate understanding
- Develop a structured approach to communication in order to verify the approach, the clarity and common understanding
- Identify and communicate business and operational benefits

2.3.3 Describe the processes and techniques required to obtain senior board approval

(RoK not exclusive)

Processes and techniques required to obtain senior board approval include:

- Present the issues, options, recommendations for action and costs and benefits to the appropriate senior audience e.g. the board
- Perform a risk analysis
- Develop a business case for the proposed option
- Develop a resources and time plan for action
- Canvass and develop ideas and options in advance with key stakeholders
- Develop alternative plans and options as required

2.3.4 Demonstrate a practical understanding of commercial management of the service desk

(RoK not exclusive)

To manage the service desk like a business:

- Develop and maintain supporting processes and procedures, including:
 - Team responsibilities
 - Deliverables
 - Expectations
 - Reporting
 - Auditing and compliance
- Clearly communicate the deliverables and influence expectations
- Adhere to agreed service levels
- Produce regular progress reports
- Balance costs, performance and quality
- Manage the professional development of service desk staff
- Define strict time-lines and budgets
- Recognize the impact of proposed services on the success of the organization as a whole
- Promote the service desk's services
- Seek stakeholder input to and acceptance of new services: take account of:
 - Interaction costs
 - Cost of ownership

2.4 Financial Management

2.4.1 Describe the objectives of financial management

(RoK not exclusive)

The objectives of financial management include:

- Financial management of IT services
- Plan for the future
- Manage the cost of providing IT services
- Align IT service costs to business processes or supporting services
- Support customers and the organization by delivering value for money
- Identify and manage the cost of the role of IT in assisting the organization to achieve its objectives

2.4.2 Summarize the activities involved in financial management

(RoK not exclusive)

The activities involved in financial management are:

- Accounting
 - Keeping track of actual spend on the desk
 - Budgeting for and obtaining value for money from investments and suppliers
- Budgeting
 - Capital versus operating costs
 - Fixed versus variable costs
 - Direct versus Indirect costs
- Charging (billing)
 - Understand the value of charging for IT support services
- ROI - return on investment
- Unit cost - calculates the unit cost of delivering a service

2.4.3 Describe Return on Investment (ROI)

(RoK not exclusive)

Return on investment and its calculation is typically defined by each organization. It is:

- A method to justify investments
- A financial calculation used to establish the time it will take to recover the costs of the investment (payback period)
- A measure of the value of the investment
- An assessment of cost and benefits

2.4.4 Describe a business case

(RoK not exclusive)

A business case is a justification for a proposed project or undertaking on the basis of its expected commercial benefit.

2.4.5 List the basic steps used to produce a business case

(RoK not exclusive)

The basic steps used to produce a business case are:

- Identify tangible (quantifiable) benefits, such as cost savings and/or productivity improvements over a specified time period
- Identify intangible benefits, such as operational quality, time savings for customers
- Develop options and recommendations, with associated benefits
- Identify the risks associated with doing or not doing the options/recommendations
- State the assumptions associated with the options/recommendations
- Identify incremental revenue
- Produce an ROI report written in business language
- Proof read to confirm accuracy before presenting

2.5 Organizational Change Management

2.5.1 Describe the purpose of organizational change management

(RoK not exclusive)

The purpose of organizational change management is to adapt to changes in the organization's structure and direction in a coordinated and project-based manner. It comprises processes and procedures designed to manage change effectively, with minimized risk and interruption to customers and services.

Changes could include:

- Introduction or withdrawal of new services
- Mergers and acquisitions
- Changes to structure and roles
- Increased volumes of work
- Cost cutting and operational rationalization
- Changes to working practices
- Implementation of new innovations and initiatives

2.5.2 Identify the benefits of using an organizational change management process

(RoK not exclusive)

The benefits of using an organizational change management process include:

- Improves the organization's performance
- Manages risk
- Involves stakeholders in developing plans and gains their buy-in to new plans
- Reduces the adverse impact of changes
- Assists with planning and optimizing resources

2.5.3 Identify key elements of organizational change management

(RoK not exclusive)

Key elements of organizational change management include:

- Awareness and issue clarification
- Business case development and planning
- Operational planning
- Structured communications e.g. using RACI (responsible, accountable, consulted, informed)
- Project management and governance
- Implementation and review
- Ensuring employee fairness and consistency
- Complying with legal, financial and human resource requirements
- Protecting and promoting industrial relations

2.6 Project Management

2.6.1 List the elements required for successful project management

(RoK not exclusive)

The elements of successful project management include:

- Time management
- The project is scoped and planned
- Project objectives are defined
- Success criteria are established and documented
- Project risks are managed
- Costs are managed
- Project stages/milestones are identified, controlled and managed
- Resources are managed
- The identified project deliverables are achieved
- Good communication and expectation management
- The project is formally closed
- The success of the project and the lessons learned are reviewed
- Focus on continual improvement

2.6.2 Identify the characteristics of a successful project plan

(RoK not exclusive)

The characteristics of a successful project plan include:

- Activities and resources are identified and coordinated for each phase of the project
- Stakeholders are identified
- There is clear and active sponsorship at senior level
- A communication plan is defined
- Milestones and deliverables are identified
- Roles and responsibilities are defined
- Costs are estimated, budgeted for and tracked
- Time is allocated for resources to complete tasks appropriately
- Project meetings and reviews are regularly scheduled and reported
- Quality is defined and reported on
- The impact of dependencies is understood
- Risk factors are identified and mitigated
- The correct product or service is delivered to the customer

2.7 Communication Skills

2.7.1 Identify the communication competencies required for the Service Desk and Support Manager to deliver on commitments

(RoK not exclusive)

To deliver on commitments successful Service Desk and Support Managers:

- Communicate the service desk's goals, objectives and how they align with IT and the organization's objectives
- Provide consistent and constructive feedback to their team(s)
- Emphasize the need for results, not just activity
- Demonstrate confidence in their teams and match words with actions
- Demonstrate to their team(s) how progress is monitored, benchmarked, and corrected
- Are able to say 'NO' where appropriate and explain the reasoning
- Sell successes and highlight areas for improvement
- Share the key management reports that show the ability of the service desk to meet goals and objectives
- Work to include the service desk as a key component in the roll-out of new and upgraded systems; for example as part of release and deployment management

2.7.2 Identify appropriate channels of communication to use

(RoK not exclusive)

Appropriate channels of communication include:

- Peer-group meetings
- Target-group meetings
- Mass meetings
- E-mail
- Telephone
- Social networking
- Digital channels

2.7.3 Create a communication plan to coordinate all available channels of communication in order to improve the effectiveness of messages

(RoK not exclusive)

To create an effective communication plan:

- Establish the timing and frequency of each message
- Decide on the most effective channel to use for delivering the message
- Adopt the simplest and most effective method to update the plan
- Nominate an owner

2.7.4 Identify the purpose of conducting meetings

(RoK not exclusive)

A meeting might be conducted for one or more of the following purposes:

- Planning
- Distribute information, such as a briefing
- Gather information i.e., focus group, brainstorming sessions
- A combination of the above
- Review team performance and areas identified for improvement
- Disciplinary reasons

2.7.5 Describe methods used to conduct meetings

(RoK not exclusive)

Meetings might be conducted using one or more of the following options:

- In person
- Audio/telephone
- Video
- Digital; for example internet, webcasts, hangouts, video chat

2.7.6 Identify the characteristics of a successful meeting

(RoK not exclusive)

The characteristics of a successful meeting include:

- The meeting is scheduled with adequate notice to ensure that participants have sufficient time to prepare and that:
 - A chairperson is appointed
 - An agenda is published
 - Conformance to the agenda is managed by the chairperson
 - Objectives are defined
 - Participants, time and location are identified
 - Expectations of participants are identified
 - It starts and stops on time
- All participants actively contribute
- Meeting accomplishments, open items and assigned action items and deadlines are documented and published in a timely manner
- The time constraints of participants are recognized

2.7.7 Explain how to prepare written communications

(RoK not exclusive)

When preparing a written communication:

- Establish the purpose and audience
- Recognize and understand the objectives of the audience
- Collect, organize and analyze data
- Write concisely
- Use business language that customers understand

2.7.8 Identify requirements for preparing an effective presentation

(RoK not exclusive)

The requirements for preparing an effective presentation include:

- Identify the who, what, why, how, where and when and consider that some people prefer words, and others prefer graphics
- Use visual aids e.g. slides, flip charts, visualizers and electronic white boards
- Provide supporting documentation if required
- Consider using virtual tools
- Identify the three key stages:
 - Introduction
 - Main body
 - Summary
- Express key points clearly
- Use terminology the audience will understand
- Review and practice in advance
- Recognize cultural differences
- Identify what techniques are appropriate for the audience
- Plan how to obtain feedback
- Be aware of body language

2.7.9 Identify considerations for developing a presentation

(RoK not exclusive)

Considerations for developing a presentation include the:

- Message and style of the presentation
- Corporate style and branding
- Color of the font and the background
- Typestyle and size of the font
- Number of items and amount of text on each slide
- Available time - tailor accordingly
- Position of audio visual equipment
- Welfare requirements of the audience

2.7.10 Identify considerations when using on-line collaborative conferencing services

(RoK not exclusive)

Considerations for using on-line collaborative conferencing services such as web conferencing, web seminars (webinars) and webcasts include:

- Style and content
 - Digital features used
 - Slideshow presentation
 - Live or streaming video
 - Use of whiteboards
 - Use of text chat
 - Polls and surveys
 - Web tours
 - Screen/desktop/application sharing
 - Document collaboration
 - Recording
- Body language
- Absence of eye-to-eye contact
- Timing and managing of breaks
- How to check for agreement and obtain feedback

2.7.11 Identify techniques for engaging the audience

(RoK not exclusive)

Techniques for engaging the audience include:

- Ask questions designed to elicit verbal responses and participation from the audience
- Give the audience a tangible vision of your ideas
- Use real life experiences and anecdotes
- Do not rely solely on slides
- Use graphics and colors in presentations rather than text lists and bullet

2.8 Listening Skills

2.8.1 Describe the behaviors that demonstrate effective listening skills

(RoK not exclusive)

The behaviors that demonstrate effective listening skills are:

- Face-to-face:
 - Stop what you are doing and turn your body towards the person
 - Use eye contact if appropriate for your culture
 - Adopt a suitable posture
 - Paraphrase and question to verify understanding
 - Take notes to summarize information received and given but do not write constantly
- On the phone
 - Make appropriate verbal responses
 - Question to clarify
 - Paraphrase to verify understanding
 - Avoid interrupting inappropriately
 - Focus on the person talking
 - Take notes to summarize information received and given but do not write constantly

2.9 Information Gathering Methods

2.9.1 Identify the differences between the three information gathering methods

(RoK not exclusive)

The three information gathering methods are:

- One-way
 - Customers provide information without being prompted
 - Out-of-hours requests
 - Voice mail, e-mail, fax
- Structured
 - Common, ordered and repetitive types of requests and issues
 - Pre-defined format and sequence; for example, web or portal access using pre-defined entry forms
- Unstructured
 - Free-form questions are asked

2.10 Negotiation Skills

2.10.1 Describe the requirements for successful negotiation

(RoK not exclusive)

The requirements for successful negotiation include:

- Seek a win-win solution - be willing to find a compromise that is acceptable to all stakeholders
- Establish the underlying need
- Separate the person from the problem
- Acknowledge the benefit of the other person's idea, from their perspective
- Discuss each other's perceptions
- Solicit participation from all stakeholders
- Set objective criteria to measure results
- Recognize that different personality types, emotions and motivations of participants exist and know how to address them

2.10.2 Demonstrate the characteristics of a good negotiator

(RoK not exclusive)

A good negotiator:

- Develops well-planned and realistic commitments
- Is prepared to present a strong case for their chosen position/argument
- Is flexible and willing to change their position
- Knows their limits/boundaries
- Solves problems
- Identifies relevant options from which to choose
- Explains concerns about each participant's ideas
- Asks for examples and clarification when necessary
- Focuses on requirements first, not how to get there
- Strives to understand differences from all points of view
- Does not blame anyone
- Follows through on commitments and communicates issues and completions
- Is thought of as a good listener

Concept 3 - Business Integration

3.1 Implementing Strategic Vision

3.1.1 Identify techniques for establishing effective relationships with other teams and groups in the IT organization

(RoK not exclusive)

Techniques for establishing effective relationships with other parts of the IT organization include:

- Communicate the goals, projects, and objectives of the service desk
- Focus on how to achieve the objectives
 - Identify steps necessary to deliver commitments
 - Focus on actions needed to meet the requirements for success
- Create a business case for significant projects along with their critical success factors
- Understand the roles and responsibilities that each team has in meeting IT service and business objectives
 - Educate yourself and your team on the roles and responsibilities of the other teams
 - Educate other teams on the roles and responsibilities of your team
- Treat your colleagues in the IT organization as customers
- Treat your service desk colleagues as you would like to be treated
- Involve stakeholders and feedback the value of their contribution
- Recognize the achievements of others
- Schedule regular meetings between key service desk staff and key members of other teams

3.1.2 Identify how to use formal and informal networks to accomplish objectives

(RoK not exclusive)

To use formal and informal networks to accomplish objectives:

- Ensure that actions, which are likely to affect other departments such as financial and staffing consequences for the organization, are discussed with your manager or other knowledgeable managers before any action is taken
- Identify the key stakeholders and obtain their buy-in to your recommendations
- Understand the power of informal leaders and obtain their buy-in to your recommendations
- Provide reports to demonstrate stakeholder contributions

3.1.3 Describe how to build effective working relationships

(RoK not exclusive)

To build effective working relationships and establish your credibility:

- Honor your commitments
- Do not commit to unrealistic targets to gain favor
- Ensure that your commitments are clearly understood
- Continually strive to improve your team
- Encourage mutual respect within and between teams
- Let others know that you respect their opinions
- Have open communications with team members
- Recognize different agendas
- Actively listen to others
- Demonstrate empathy - make certain that you understand others' concerns and issues
- Be accountable for your actions
- Take ownership

3.1.4 Identify the responsibilities of the Service Desk and Support Manager when contributing to IT and business objectives

(RoK not exclusive)

When contributing to IT and business objectives, the responsibilities of the Service Desk and Support Manager include to:

- Advise senior management about issues, their status and any concerns about service desk matters
- Provide suggestions on how to improve IT services
- Ensure that the service desk is represented on all design, transition and service improvement initiatives
- Gather information, analyze, and communicate results
 - To/from IT staff
 - To/from customers
- Participate in the organization's initiatives and cross-functional teams
- Identify initiatives that contribute to the success of the organization

3.1.5 Explain the value of conducting assessments

(RoK not exclusive)

Conducting an assessment is a necessary step in managing change and for continual improvement. It identifies the issues and opportunities to be used as the as the basis for change and development.

- Key types of assessment methods are:
 - SWOT - Strengths, weaknesses , opportunities threats
 - CSA - Current state analysis
 - Gap analysis - identify areas that do not meet current or future expectations
 - Benchmarking
- Outputs from assessments would include:
 - Business case/cost benefit analysis
 - Changes programs and projects

3.2 Sourcing Models

3.2.1 Describe the various sourcing options available for delivering consistent quality service

(RoK not exclusive)

The various sourcing options available for delivering consistent quality service are:

- Internally resourced - 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.

3.2.2 Describe the outsourcing models used in a service desk environment

(RoK not exclusive)

The outsourcing models used in a service desk environment include:

- Off-site - contracting with a third-party supplier to provide support services on the provider's premises that an organization might otherwise have employed its own staff to provide. The service could be delivered from an off-shore location in close geographical proximity (near-shoring) or more geographically distant (far-shoring)
- On-site - when an organization contracts with another organization to provide support services on its own premises that it might otherwise have employed its own staff to provide

3.2.3 List the issues to consider when insourcing and outsourcing

(RoK not exclusive)

Issues to consider when insourcing and outsourcing include:

- Due diligence to establish:
 - Stability of the service provider
 - Sustainability of the services provided
 - Capability to deliver required services
- The transition process
 - Transfer of intellectual property and ownership
 - Knowledge transfer
 - Management of customer expectations and experience
- Establish clear and measurable objectives
- Financial considerations - costs and benefits expected
 - Cost of implementation
 - Cost of ongoing management
 - Cost of integration
 - Productivity improvements
- The service supply chain
- Contractual requirements and obligations
- Availability of relevant in-house commercial skills
- Risk assessment and ownership of third-party relationship risk management
- The cost of monitoring and managing the risks
- Responsibility for the review and ongoing monitoring of individual relationships
- Impact on internal resources
- Impact on business as usual
- Impact on staff morale
- Legal requirements
- Geographical location of data and its security
- Sourcing fatigue caused by continued change
- Diversity, inclusion and social responsibility policies
- Exit strategy
- Transfer of employees upon termination

3.2.4 Explain the benefits of outsourcing

(RoK not exclusive)

The benefits of outsourcing include:

- Focuses management resources on core competencies and the quality of the services provided
- Processes and procedures are defined and documented for inclusion in the contract
- Eliminates day-to-day supervision costs of the outsourced team
- Reduces capital expenditure and moves costs to operating expenses
- Drives efficiencies
- Optimizes resources
- Facilitates improved staffing flexibility
- Potentially delivers improved quality of customer service and engagement
- Allows existing staff to focus on other initiatives
- Opens up new opportunities for existing staff

3.2.5 Explain the benefits of insourcing

(RoK not exclusive)

The benefits of insourcing include:

- Operational business control
- Transparency of operations and costs
- Expands the remit of the service desk
- Focus from committed and dedicated in-house staff for delivery
- Potential for reduced levels of management
- Potential for less contractual obligation when managing customer needs
- Potential agility around supply chain, operations and development
- Able to work outside the scope of contracted outsourced services
- Closer alignment with the strategy, vision and mission of the organization

3.2.6 Explain the risks associated with insourcing and outsourcing that need to be considered

(RoK not exclusive)

The risks associated with outsourcing include:

- Resources might be inadequate to oversee the outsourcing relationship, contractual compliance and change management
- Reduction in the direct control of day-to-day operations, including out-sourced staff
- Infrastructure efficiency might be impacted if costs are fixed
- Profit/cost center expectations might impact service delivery staff
- Informal contacts and sources of information might be lost
- Without sufficient integration, contractual agreements might inhibit previously available flexibility
- The organizations involved might use different, multiple service management and knowledge management systems without sufficient integration
- Potential for higher cost and poorer service if the service supply chain is not adequately defined
- Service consistency might suffer
- Business vision and service desk mission and vision are difficult to align
- Customer service and engagement might be affected due to communication issues or lack of advertising and promotion
- The perception that inferior service quality is negatively impacting the customer experience and satisfaction

3.2.7 Explain the service level management (SLM) considerations when outsourcing

(RoK not exclusive)

The service level management considerations required to successfully negotiate a contract with an outsourcer include:

- Define the business objectives to be achieved by the services provided
- Describe the service deliverables in detail
- Define the expected performance standards
- Define an ongoing reporting mechanism to measure and monitor expected performance
- Evaluate the value received from the relationship
- Provide a mechanism for review and change to the service levels over the course of the contract
- Retain the right to terminate the contract where performance standards fall consistently below an acceptable level
- Regularly measure and monitor risk
- Define and agree underpinning contracts (UCs) with external suppliers
- Explicitly state the accountabilities, roles and responsibilities of both the service provider and the customer
- Define and document related policies, processes and procedures
- Define the interfaces between outsourcers, the customer and other partners
- Define performance levels that support those in the SLA , for example, response times, resolve times, status updates
- Provide a remedial mechanism and compensation regime for when performance standards are not achieved, while incentivizing the service provider to maintain a high level of performance
- Business continuity plans
- Positive and negative service credits

3.2.8 Describe multi-sourcing

(RoK not exclusive)

Multi-sourcing means to identify the proper balance of outsourcing and other sourcing options to ensure financial and operational effectiveness covering:

- Facilities
- Outsourced staff
- Permanent staff
- Contract staff
- Temporary staff

3.2.9 Identify the benefits of multi-sourcing

(RoK not exclusive)

The benefits of multi-sourcing include:

- Maintains operational control while enabling the utilization of effective external options
- Provides an optimum mix of resources (outsourced, contract, temporary) that balances customer service and engagement quality with corporate Return on Investment (ROI)
- Offers greater flexibility and control for the buying organization

3.3 Promoting the Service Desk

3.3.1 Identify the objectives of promoting the service desk

(RoK not exclusive)

The objectives of promoting the service desk include to:

- Raise awareness of the service desk's contribution (value) in meeting business goals to customers and the organization
- Improve the service desk's strategic position and business influence
- Communicate the mission
- Communicate the available IT services
- Manage customer expectations
- Increase the visibility of the service desk
- Manage the customer experience
- Increase customer loyalty
- Clarify customer responsibilities and benefits
- Improve the perception of the service desk's credibility and professionalism
- Improve morale

3.3.2 Give examples of channels available for promoting the service desk

(RoK not exclusive)

Examples of channels available for promoting the service desk include:

- IT services scorecard/dashboard that identify the service desk's performance, for example:
 - Customer satisfaction
 - SLM measurements
- Organization or service desk newsletter
- 'Lunch and Learn' sessions
- Shadowing
- Spending time in different areas of the business
- Social media
- Social collaboration tools
- Communication groups e.g. Yammer/SharePoint
- Meet with customers one-on-one and ask them what they need
- Set up a kiosk at organization/customer meetings in key areas like the cafeteria
- Distribute flyers containing service desk information and FAQs
- Promote the service desk via your organization's and/or service desk's intranet
- Hold an 'Open House' - let your customers meet the people who solve their incidents and service requests
- Organize 'Road Shows' - go to your customers
- Schedule times for service desk staff to walk the floor in key customer areas
- Induction sessions for new starters
- Demonstrate to business areas how to use new services
- Enter for industry awards
- Video the desk in action and use in promotion programs

3.3.3 Identify key activities to be undertaken when planning a promotion program

(RoK not exclusive)

The key activities to be undertaken when planning a successful promotion program include:

- Clearly define the objectives and messages to be communicated
- Identify the target audience and communicate using the appropriate channel
- Consider budget and resource requirements
- Consider whether there are multiple, specific, targeted communications or one communication for all audiences
- Obtain feedback to verify that the message was delivered and understood
- Understand the communications requirements within the organization
- Plan appropriately for regularly scheduled and ongoing communication

3.3.4 Explain how to manage stakeholder expectations

(RoK not exclusive)

To manage stakeholder expectations :

- Evaluate current levels of performance and soliciting feedback
- Contribute to, use and promote the service catalog
- Define service levels that balance resources and capability with business requirements
- Offer multiple channels to provide information about the service desk
- Survey customers frequently to understand and respond to their needs
- Link service desk KPIs with the organization's business objectives and KPIs

Concept 4 - Operational Management

4.1 Information Technology Service Management (ITSM)

4.1.1 Describe IT service management and explain its objectives

(RoK not exclusive)

ITSM is the implementation and management of quality IT services that meet the needs of the business. IT service management is performed by IT service providers through an appropriate mix of people, process and information technology.

The objectives of ITSM include to:

- Create, design, deliver, manage and optimize IT business services from beginning to end (service life-cycle)
- Integrate with business processes
- Reduce costs and optimize resources
- Increase IT infrastructure and service reliability
- Protect investment and reduce risk
- Improve customer experience and communication
- Increase business value
- Improve engagement and alignment with service providers

4.1.2 Describe ITIL®

(RoK not exclusive)

ITIL® is a worldwide IT service management best practice and offers guidance for the design, planning, delivery and management of IT services and support infrastructure from beginning to end. It aligns with and underpins ISO/IEC 20000 the worldwide standard comprising:

- Service Strategy
- Service Design
- Service Transition
- Service Operation
- Continual Service Improvement

4.2 Incident Management

4.2.1 Describe the responsibility and objectives of the incident management process

(RoK not exclusive)

The incident management process is responsible for managing the life-cycle of incidents.

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

4.2.2 Explain the service desk's responsibilities in and its relationship with the incident management process

(RoK not exclusive)

The service desk sits at the center of the incident management process and is responsible for:

- Provide a single point of contact (SPOC) for support
- Ownership of incidents
- Resolve as many incidents as possible at the first point of contact
- Escalate incidents to other teams as stated in the service level agreement or operational level agreement
- Facilitate a fast incident resolution
- Track, monitor and chase incident progress
- Provide positive and timely incident updates and communications to customers
- Provide information and updates about service performance
- Provide data for the problem management process

4.2.3 Describe the principal activities of the incident management process

(RoK not exclusive)

The principal activities of the incident management process are:

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

4.2.4 Explain the benefits of the incident management process

(RoK not exclusive)

The benefits of the incident management process include:

- Reduces the impact of incidents on the business
- Improves resolution times (reduces down-time)
- Gives consistency to the categorization and prioritization of incidents
- Provides a system wide view of incidents encountered
- Manages an incident from beginning to end to ensure consistency and quality
- Provides an information source for identifying points of failure
- Facilitates proactive communication
- It is an information source for helping to prevent future incidents
- Helps to provide accurate management information
- Identifies areas for improvement
- Assists in identifying trends and work-flows

4.3 Request Fulfillment

4.3.1 Define a service request

(RoK not exclusive)

A service request is a formal request from a customer for information, advice, a standard change or for access to an IT service, for example, 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 may be linked to a request for change as part of fulfilling the request.

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4.3.2 Describe the responsibility and objectives of request fulfillment

(RoK not exclusive)

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

The objectives of request fulfillment are to:

- Provide a channel for customers to request and receive 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, complaints or comments

4.4 Problem Management

4.4.1 Describe the responsibility and objectives of the problem management process

(RoK not exclusive)

Problem management is the process responsible for managing problems throughout their life-cycle.

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The primary objectives of problem management are to:

- Minimize the adverse impact of incidents and problems on the business caused by errors within the IT Infrastructure
- Prevent the recurrence of incidents related to these errors
- Minimize the impact of incidents that cannot be prevented
- Establish the root cause of incidents and then initiate actions to improve or correct the situation

4.4.2 Explain the service desk's responsibilities in and its relationship with the problem management process

The service desk is not usually responsible for problem management. Its supporting responsibilities in the process are to:

- Highlight recurring incident to problem management
- Work with technical teams to diagnose problems when appropriate
- Ensure incidents are logged correctly and that all appropriate information from the customer, and the steps taken so far, are recorded accurately
- Uses knowledge base entries (workarounds) for fast resolution of recurring or routine incidents

4.4.3 Describe reactive and proactive problem management in relation to the service desk

(RoK not exclusive)

In relation to the service desk, reactive and proactive problem management are described as:

- Reactive problem management is concerned with solving problems in response to one or more incidents
- Proactive problem management is concerned with identifying problems that might otherwise be missed. It analyzes incident records and data collected by other IT service management processes to identify trends or significant problems

4.4.4 Explain the benefits of the problem management process

(RoK not exclusive)

The benefits of the problem management process include:

- The quality of IT services is optimized
- Improved availability of IT services
- Reduced down-time
- The reputation of IT is enhanced
- Reduced volume of incidents
- Improved productivity of the business and IT
- Reduced time to resolve incidents
- Increased first contact resolutions
- The IT support mind-set moves from error correction to service enhancement (from a reactive to a proactive attitude)
- Contributes to continual service improvement

4.5 IT Change Management

4.5.1 Describe the responsibility and objectives of the IT change management process

(RoK not exclusive)

IT change management is the process responsible for managing changes throughout their life-cycle.

The primary objectives of the IT change management process are to:

- Enable beneficial, approved changes to be made with minimum disruption to IT services
- Control changes to the infrastructure and IT services
- Create and maintain a change schedule
- Ensure changes to IT services and infrastructure are tested, planned, scheduled, coordinated and communicated
- Identify what resources are required and when, the cost, the risk and the impact
- Minimize business risk

4.5.2 Explain the service desk's responsibilities in the IT 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 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
- Halt changes that might negatively impact service delivery
- Communicate planned system downtime and interruptions to customers

4.5.3 Explain the benefits of IT change management to the service desk

(RoK not exclusive)

The benefits of the IT change management process include:

- Improves the stability and availability of services and systems by reducing the number of failed changes
- Protects the business environment by minimizing disruption
- Prevents unauthorized changes from being made
- Increases the visibility and communication of change

4.6 Release and Deployment Management

4.6.1 Describe the responsibilities and primary objectives of the release and deployment management process

(RoK not exclusive)

Release and deployment management is the process responsible for:

- The successful roll-out of new or changed services, hardware, software, related documentation or process, that might affect the delivery of underpinning IT services to the business and its customers safely and with minimum risk
- Early life support

The primary objectives of release and deployment management are to:

- Ensure that the hardware, software or service being changed is traceable and secure, and that only correct, authorized and tested versions are installed
- Agree the exact content and plan for the release, through liaison with change management
- Ensure that the service desk is involved in the roll-out plan so that it can provide appropriate support for new releases

4.6.2 Explain the service desk's responsibilities in the release and deployment management process

(RoK not exclusive)

The service desk's responsibilities in the release and deployment management process are to:

- Work with development teams to ensure that the service can be properly supported at and beyond launch
- Support the launch process with flexible levels of support as needed
- Provide suitable formats and templates to ensure that information is provided in an appropriate form for service desk support
- Participate in customer communication and expectation management during roll-outs

4.6.3 Explain the primary benefits of the release and deployment management process

(RoK not exclusive)

The primary benefits of release and deployment management are:

- Increased success rate in the release of applications and improved quality of service delivered to the business
- Minimized disruption of service to the business
- Minimized regression-testing requirements
- Robust system implementation reduces the support burden on the service desk
- An audit trail of released service is maintained

4.7 Service Asset and Configuration Management (SACM)

4.7.1 Describe the responsibilities and primary objectives of the service asset and configuration management process (SACM)

(RoK not exclusive)

The responsibilities of the SACM process are to ensure that:

- The assets required to deliver services are properly controlled
- Accurate and reliable information about those assets is available when and where it is needed to enable people to make decisions at the right time

The primary objectives of the SACM process are to:

- Account for, manage and protect the integrity of configuration items throughout the service life-cycle
- Work with change management to ensure that only authorized components are used and only authorized changes are made
- Minimize the number of quality and compliance issues caused by incorrect or inaccurate configuration of services and assets
- Maintain accurate configuration information on the historical, planned and current state of the services and infrastructure

4.7.2. Explain the service desk's responsibilities in the service asset and configuration management process (SACM)

(RoK not exclusive)

The service desk's responsibilities in the SACM process are to:

- Use the information contained in the configuration management system to aid fast and accurate incident logging
- Update configuration information to support accurate incident diagnosis
- Notify the person responsible for the SACM process of any discrepancies based on information received during incident logging so that a permanent change can be made

4.7.3 Explain the primary benefits of the service asset and configuration management process

(RoK not exclusive)

The primary benefits of the service asset and configuration management process are that:

- Services, assets, resources and processes are properly managed and maintained (what, where, who, how many and how much)
- Relationships and dependencies between physical assets, components, software and services within an organization are maintained to produce an intelligent, integrated inventory

4.8 Knowledge Management

4.8.1 Describe the responsibility and primary objectives 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 objectives of knowledge management are to:

- Improve efficiency by reducing the need to rediscover knowledge
- Generate value from its intellectual and knowledge-based assets

Generally intellectual and knowledge-based assets fall into one of three categories: explicit, tacit and intuitive.

- Explicit - includes assets, such as business plans, policies, processes, procedures, solutions and customer advice, research material or anything that can be documented, archived or codified
- Tacit - the know-how contained in people's heads
- Intuitive- predicts the probability of the success of several relevant knowledge resolution solutions

4.8.2 Explain the service desk's responsibilities in the knowledge management process

(RoK not exclusive)

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

- Use all information and resolution data available to effect a high first contact resolution rate for customers
- Provide feedback about the relative value of knowledge items and other available information
- Provide templates for the optimum format and level of information needed for first time fixes
- Lead by example and encourage wider use of knowledge management

4.8.3 Describe what constitutes a knowledge base

(RoK not exclusive)

A knowledge base comprises a set of tools and databases that are used to manage, update and present the knowledge and information that an IT service provider needs in order to manage the full life-cycle of IT services.

4.8.4 Identify the characteristics required of an effective knowledge management system

(RoK not exclusive)

To be effective a knowledge management system must be:

- Contemporary
- Concise
- Accessible
- Trustworthy
- Integrated with other tools and systems
- Owned and managed

4.8.5 Explain the benefits of a knowledge base

(RoK not exclusive)

The benefits of a knowledge base include:

- It enables service desk staff and customers to work more effectively and efficiently
- Training time for new staff is reduced
- Helps to provide a more professional view to the business giving customers confidence in the capability of the desk
- Problems are solved once and solutions are used many times
- Allows for incremental solution building
- Sharing knowledge develops a rapport and establishes credibility between the various support teams
- More effective support processes are facilitated
- Reduced costs for the organization
- Ensures that knowledge is consistent and complete
- Reduced number of escalated incidents

4.8.6 List the steps required to develop and maintain a knowledge base

(RoK not exclusive)

The steps required to develop and maintain a knowledge base include:

- Define templates and layouts for knowledge articles in order to optimize the speed with which an article can be reviewed during a call
- Capture tacit knowledge
- Review and evaluate information and solutions to improve accuracy and ensure conformity to standards
- Store information in a structured, centralized repository
- Ensure content is controlled, approved and searchable
- Make the content available to customers when and where they need it

4.9 Information Security and Access Management

4.9.1 Describe the responsibility and primary objectives of the information security and the access management processes

(RoK not exclusive)

Information security management is the process responsible for ensuring the confidentiality, integrity and availability of an organization's assets, information, data and IT services. It forms part of the organization's overarching business security which includes areas, such as access to data, buildings and telephone calls for the entire organization.

Access management is the process responsible for the operational actions in the policies defined in information security management.

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The primary objectives of information security and access management include to:

- Reduce and minimize business risk
- Ensure IT service continuity for the business
- Meet security requirements as defined in the SLA
- Meet requirements for security drawn from underpinning contracts, legislation, and imposed security policies
- Maintain regulatory and compliance evidence
- Provide basic data security to the organization
- Ensure IT operates adequate and cost effective security controls

4.9.2 Explain the service desk's responsibilities in the information security and access management process

(RoK not exclusive)

The service desk's responsibilities in the information security and access management process are to:

- Confirm identification of customers
- Provide fast resolution to access incidents as appropriate
- Follow relevant IT security policies
- Ensure that good and consistent advice on the proper use of security and IT policies is given
- Quickly escalate any issues where security might be compromised

4.9.3 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
- Vishing
- Social engineering
- Malicious software
- Bogus callers
- Identity fraud
- Manipulation
- Scam mail
- Fraudulent gathering of information

4.9.4 Explain the benefits of the information security and access management process

(RoK not exclusive)

The benefits of the information security and access management process include:

- A clear and unambiguous security policy is available for everyone to follow
- Personal and organizational data is protected
- The risk of physical security breaches is minimized
- The business has an appreciation of the resources and costs required to ensure the security of information, thus enabling a better understanding of the risks and vulnerabilities

4.10 IT Service Continuity Management

4.10.1 Describe the responsibility and objectives of the IT service continuity management process

(RoK not exclusive)

The IT service continuity management (ITSCM) process is responsible for managing risks that could seriously impact IT services. ITSCM ensures that the IT service provider can deliver the required minimum agreed service levels by reducing the risk to an acceptable level and by planning for the recovery of IT services. It also supports business continuity management.

The primary objectives of IT service continuity management are to:

- Maintain critical customer services with minimal disruptions
- Eliminate single points of failure for delivering services
- Provide both short and long-term continuity options
- Plan for and maintain infrastructure resources that are critical to the survival of the business

4.10.2 Explain the service desk's responsibilities in the IT service continuity management process

(RoK not exclusive)

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

- Participate in the development of a business continuity plan
- Develop a service desk continuity plan in order to provide post emergency support for critical services and develop a long term plan for restoring all services to business as usual
- Nominate a process owner to be responsible and accountable for the plan
- Collaborate with other service continuity plan owners to ensure that the service desk plan integrates with the wider plan
- Provide support to regularly test, review and amend the plan to ensure that it continues to be fit for purpose
- Identify the critical service desk activities and software/ hardware applications, including SMS, and ACD telephony/email services
- Encourage IT teams to contribute resolutions to the service desk in order to reduce single-point-of-failure issues
- Provide an up-to-date service desk staff contact list
- Provide details of a secondary service desk facility or home-working arrangements and any special transport measures
- Provide details of where to find to hard copy key service desk and support processes and procedures

4.10.3 Explain the benefits of the IT service continuity management process

(RoK not exclusive)

The benefits of IT service continuity management include:

- Improved risk management
- Decrease in potential lost revenue
- Potential lower insurance premiums
- Regulatory requirements are met (for some industries)
- Effective recovery of business services and systems following a major outage or disaster

4.11 Service Catalog Management

4.11.1 Describe the responsibilities of the service catalog management process

(RoK not exclusive)

The responsibilities of the service catalog management process are to:

- Manage the information contained within the service catalog
- Ensure the service catalog is accurate
- Ensure that the service catalog is made available to those approved to access it
- Ensure that the service catalog supports the evolving needs of other service management processes

4.11.2 Explain the service desk's responsibilities in the service catalog management process

(RoK not exclusive)

The service desk's responsibilities in the service catalog management process are to communicate:

- What the service provider can do for the customer
- How to interact with the service provider
- How to place service requests
- The cost of the service
- How to gain access to service information
- How supporting services underpin business capability
- The impact of service failures
- Inaccuracies to the service catalog manager

4.11.3 Explain the benefits of the service catalog management process

(RoK not exclusive)

The benefits of the service catalog management process are:

- The service desk is able to use the service catalog as a marketing and communication tool
- A common understanding of IT services is ensured
- Improved relationships between the customer and service provider
- Improved service provider focus on customer outcomes by correlating internal service provider activities to business processes and outcomes
- Improved knowledge, alignment and focus on the 'business value' of each service throughout the service provider's organization and its activities

4.11.4 Describe the key structural elements of the 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, For example:

- Customer-facing - contains details of all live IT services delivered to customers together with their relationships to the business units and the business processes that rely on them. Multiple customer facing views might be used to address the requirements of different areas of the business.
- Supporting services - contains details of all supporting IT services, together with their relationships to the customer-facing services they underpin, and the components, configuration items and other supporting services that are necessary to support the provision of each service.

4.12 Service Level Management

4.12.1 Describe the responsibility and objectives of the service level management process

(RoK not exclusive)

Service level management (SLM) is a process for optimizing and providing cost effective delivery and support of IT services aligned to business requirements.

The primary objectives of SLM are to:

- Ensure that IT service management processes, service level agreements, operational level agreements and underpinning contracts are appropriate for the agreed service level targets
- Negotiate service level agreements (SLAs) and operational level agreements (OLAs)
- Link with supplier management to ensure that underpinning contracts support the agreed service level targets defined in the SLA
- Define, document, agree, monitor, measure, report and review the level of IT services provided
- Hold regular customer reviews

4.12.2 Explain the service desk's responsibilities in the service level management process

(RoK not exclusive)

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

- Deliver services in accordance with agreed service level agreements (SLAs)
- Encourage and support other IT teams to observe and follow the requirements of service level agreements (SLAs) and operational level agreements (OLAs) and the service deliverables agreed in underpinning contracts
- Review performance and identify areas of improvement
- Participate in the service reporting process

4.12.3 List the principal components of the service level management process

(RoK not exclusive)

The principal components of the service level management process are:

- Service level requirements (SLR)
- Service catalog (SC)
- Service improvement program (SIP)
- Service level agreements (SLAs)
- Operational level agreements (OLAs)
- Underpinning contracts (UCs)
- Service level contract (SLC)
- Service level reviews and reporting

4.12.4 List the principal activities of service level management (SLM)

(RoK not exclusive)

The principal activities of the service level management process are to:

- Design service level agreement (SLA) frameworks
- Establish, document and agree service level requirements
- Scope, review and revise operational level agreements (OLAs) and underpinning contracts (UCs)
- Negotiate, agree and document service level agreements (SLAs)
- Monitor services against service level agreements (SLAs)
- Measure and improve customer satisfaction
- Produce service reports
- Conduct service reviews and instigate improvements
- Develop contacts and relationships
- Handle complaints and compliments

4.12.5 Define a service level agreement (SLA)

(RoK not exclusive)

A service level agreement (SLA) documents the service targets agreed between the customer and the service provider in order to ensure that they both understand their responsibilities. A service level agreement is not a legally binding contract but might form part of a service deliverables schedule attached to an underpinning contract.

4.12.6 List the typical content of a service level agreement

(RoK not exclusive)

Typical content of a service level agreement include:

- The types and quality of services provided
- The level of services; for example, 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 process for dealing with conflict between the customer and the service provider
- The period between agreed formal SLA reviews

4.12.7 Define an operational level agreement (OLA)

(RoK not exclusive)

An operational level agreement (OLA) is a documented agreement between internal service providers that define the responsibilities, roles and the expectations of each team necessary to meet a service level agreement (SLA).

4.12.8 Define an underpinning contract (UC)

(RoK not exclusive)

An underpinning contract (UCs) is a legally defined and binding contractual agreement made with external suppliers who provide elements of the IT support service. The negotiation of underpinning contracts (UCs) would typically be carried out in conjunction with supplier management.

4.12.9 Explain the benefits of implementing a service level management process

(RoK not exclusive)

The benefits of implementing a service level management process include:

- The customer knows and agrees the priorities and costs (quantity/quality balance)
- The expectations of the customer and service provider are set so that conflicts are minimized, trust is built and satisfaction is improved
- Increased customer loyalty
- The relationship between the customer and IT service provider is improved
- IT success metrics are defined and measured
- Allows for proactive planning
- Customers buy-in to the plan
- IT is able to prioritize and plan resources to meet specific customer needs

4.13 Quality Assurance Programs

4.13.1 Describe the purpose and objectives of a quality assurance (QA) program

(RoK not exclusive)

The purpose of a quality assurance program is to develop and maintain appropriate improvements in the quality of services provided.

The objectives are to:

- Document ongoing IT service quality program
- Agree the quality initiatives used as part of IT service delivery with customers
- Continually improve the quality and cost effectiveness of IT services
- Address IT service performance that is not meeting expectations
- Produce options and recommendations for improvement and to implement and review them

4.13.2 Identify common quality assurance practices

(RoK not exclusive)

Common quality assurance practices include:

- Customer feedback
- Benchmarking
- Incident monitoring
- Call monitoring
- Interaction monitoring
- Employee surveys
- E-mail/Chat monitoring
- KPI monitoring
- Round tables
- Focus groups
- Skill testing
- Knowledge usage monitoring
- Account management reviews
- Coaching
- Mentoring
- Regular mystery shopping
- One-to-ones

4.13.3 Identify the purpose of obtaining and recording customer feedback

(RoK not exclusive)

The purpose of obtaining and recording feedback is to understand the customer's perception of the IT organization's products and services and address any negative or positive issues identified in order to provide a consistent customer experience.

4.13.4 Identify the various opportunities for obtaining positive and negative feedback

(RoK not exclusive)

Various opportunities for obtaining customer feedback include:

- Customer complaints
- Customer surveys
- Compliments
- Suggestions
- Account management /service review meetings
- Round tables
- Focus groups
- Floor walking
- Social media
- Service desk participation in the organization's initiatives
- Road shows

4.13.5 Describe the procedure for responding to feedback

(RoK not exclusive)

The procedure for responding to feedback is:

- Record
- Assign ownership
- Identify action required
- Take appropriate action
- Respond within the agreed timeframe
- Trend and report

4.13.6 Describe the purpose and objectives of conducting customer satisfaction surveys

(RoK not exclusive)

The purpose of conducting customer satisfaction surveys is to discover customer perception of the products and services the IT organization and the service desk deliver in order to establish whether customer expectations are being met.

The objectives are to:

- Identify what customers feel is important
- Identify and prioritize areas for improvement
- Baseline and trend customer satisfaction
- Assist in developing new products and services based on customer needs
- Identify negative feedback as potential complaints and ensure they are recorded in the formal complaint log for investigation
- Validate the effect of service improvements

4.13.7 List the common types of customer satisfaction surveys conducted by the service desk

(RoK not exclusive)

The common types of customer satisfaction surveys conducted by the service desk are:

- Ongoing (event)
- Annual or periodic
- One-time or one-off

4.13.8 List common types of survey methodologies

(RoK not exclusive)

Common types of survey methodologies include:

- Weighted
- Net Promoter Score (NPS)
- Qualitative
- Quantitative

4.13.9 Describe an ongoing or event survey

(RoK not exclusive)

Ongoing or event surveys:

- Are conducted as soon as possible after a call is closed
- Are typically short and can be completed quickly
- Measure the quality of a single call or incident
- Are used to trend customer satisfaction between annual surveys
- Measure the impact of changes in processes, products, or services
- Have delivery options
- Random
- Percentage selection
- Every call - might risk over surveying the customer base

4.13.10 Describe an annual or periodic survey

(RoK not exclusive)

Annual or periodic surveys:

- Are planned and scheduled on a periodic basis (at least annually)
- Are typically longer than event based
- Are used to evaluate overall satisfaction levels with the products and services provided by the service desk and the IT organization
- Identify changes to products, services, and processes that customers feel would improve their relationship with the service desk and the IT organization and better meet their needs
- Are based on customer perception of the service desk and the IT organization over the previous period

4.13.11 Describe a one-time or one-off survey

(RoK not exclusive)

One-time or one-off surveys:

- Are not scheduled
- Are conducted for specific reasons
- Are appropriate for evaluating satisfaction levels with current product and service offerings or for identifying changes that customers feel are important

4.13.12 Describe the role of benchmarking in a service desk environment

(RoK not exclusive)

The role of benchmarking in a service desk environment:

- Provides an understanding of the relative differences and similarities between participating service desks in order to acquire a comparative evaluation of service desk performance
- Used to provide meaningful and readily implemented improvement recommendations

4.13.13 Recognize the issues to be considered when benchmarking

(RoK not exclusive)

Issues to be considered when benchmarking include:

- The use of collaborative approaches and reliable metrics that enable consistent data collection and true peer group comparisons.
- That there are two types of benchmarking
- Industry benchmarking (dissimilar demographics)
- Peer group benchmarking (similar demographics)
- How questions are interpreted or answered by other participants of the exercise
- The differing goals and objectives of participating organizations
- The differing skill sets based on business needs
- The different technology/tools used by the participating organizations
- Benchmarking might be considered a panacea
- Relevant data must be accurately captured and viewed in context

4.13.14 Describe the benefits of benchmarking

(RoK not exclusive)

The benefits of benchmarking include:

- An awareness of service desk best practices is developed
- Alternative service offerings are identified and understood
- Areas requiring service improvement are identified
- Improvements and value are demonstrated

4.13.15 Describe interaction monitoring

(RoK not exclusive)

Interaction monitoring means to monitor all communications with the service desk from all communications channels used.

4.13.16 Give examples of methods used for interaction monitoring

(RoK not exclusive)

Examples of methods for monitoring interactions include:

- Regular reviews of incident and service request logs
- Regular reviews of audit trails from every communication channel used

4.13.17 List the benefits of incident and service request monitoring

(RoK not exclusive)

The benefits of incident and service request monitoring include:

- A seamless end-to-end incident and service request management procedure is developed
- Quality and service assurance for customers and the service desk is maintained
- The service desk is able to proactively address situations
- Incidents and service requests can be reviewed with analysts to develop self-improvement
- Opportunities for ongoing improvement are identified
- Training needs are identified

4.13.18 Give examples of methods used for incident and service request monitoring

(RoK not exclusive)

Methods used for monitoring incidents and service requests include:

- Review documentation for completeness and accuracy
- Conduct an on-line review with the analyst after the incident or service request is closed
- Follow-up calls
- Customer satisfaction surveys
- Incident/service request tracking
- Service level tracking
- Automatic escalation within the IT service management system

4.13.19 List the benefits of call monitoring

(RoK not exclusive)

The benefits of call monitoring include:

- Ensures that the call handling procedure is followed
- Provides feedback to staff about job performance
- Identifies the strengths and weaknesses of individuals and the service desk
- Provides coaching opportunities
- Verifies consistency in call management
- Identifies areas where procedures are not meeting expectations or are not being followed
- Identifies opportunities for improvement
- Improves the quality of service
- Identifies training opportunities

4.13.20 Identify methods for call monitoring

(RoK not exclusive)

Methods for monitoring calls include:

- Live service observations - reviewer sits with an analyst and listens in on a call
- Remote service observations - reviewer listens to calls live, but the analyst is not aware that the call is being evaluated
- Call recording and evaluation
- Follow-up calls
- Conducting customer satisfaction surveys

4.14 Structure Models for Service Delivery

4.14.1 Identify the various structure models the service desk uses for delivering service

(RoK not exclusive)

The various structure models the service desk uses for delivering service are:

- Local
- Centralized
- Virtual
 - Follow-the-sun
 - Specialized (by channel or technology)
 - Working remotely
 - Blended - a mix of structure models
 - Single or multi-tiered

4.14.2 Identify the variables used to establish which support delivery structure model(s) is most appropriate

(RoK not exclusive)

The variables used to establish which support delivery structure model(s) is most appropriate include:

- Cost
- Range and complexity of the services offered
- Sourcing strategy
- Stipulations in service level agreements (SLAs) or support contracts
- Location of the customer
- Time zones of the customer and the service desk
- Business requirements for hours of operation
- Effectiveness of remote support tools
- Effectiveness of knowledge management
- Cultural factors

4.15 Service Desk Critical Success Factors (CSFs) Key Performance Indicators (KPIs) and Metrics

4.15.1 Explain the difference between critical success factors, key performance indicators and metrics

(RoK not exclusive)

Critical success factors define the strategic elements necessary for an organization, project or process to achieve its mission.

Key performance indicators are commonly used to help an organization control and evaluate its progress toward achieving its critical success factors and goals.

Metrics are standards of measurement by which improvements in efficiency, performance, progress, or the quality of a plan, process, or product can be assessed.

4.15.2 Identify some of the service desk's critical success factors

(RoK not exclusive)

The service desk's critical success factors should underpin the organization's stated outcomes. Examples include:

- Correctly skilled analysts to meet demand
- Effective and integrated service management processes
- Having the appropriate level of resources in place to keep the organization productive and enable us to meet support needs quickly and effectively
- Able to operate within budget

4.15.3 Identify some of the service desk's key performance indicators

(RoK not exclusive)

Examples of service desk key performance indicators (KPIs) include:

- First contact resolution
- First level resolution
- Abandon rate
- Cost per incident
- Cost per service request
- Incidents resolved within SLA
- Correctly assigned escalations
- Open interactions
- Staff turnover
- Customer satisfaction
- Employee satisfaction
- Knowledge usage

4.15.4 Describe some uses for service desk metrics

(RoK not exclusive)

Some of the uses of service desk metrics include:

- Identify required resources for staffing and scheduling
- Measure analyst performance
- Measure service desk performance
- Assess the level of customer satisfaction
- Establish operational effectiveness
- Evidence strategic value
- Support business cases
- Demonstrate that business outcomes are achieved
- Identify areas for inclusion in the continual improvement plan
- Support management decision making

4.15.5 Identify some of the common service management metrics measured by the service desk

(RoK not exclusive)

Examples of common service management metrics measured by the service desk include:

- Number of interactions
- Number and percentage of interactions by channel
- Percentage of first contact resolution
- Incident resolution time
- Average time to respond
- Percentage of abandoned calls and interactions not responded to
- Average time to resolve by priority
- Average time to resolve by category
- Percentage of open incidents by age
- Percentage of reopened incidents
- Percentage of hierarchic escalations (management)
- Percentage of functional escalations (re-assignment)
- Percentage of interactions resolved within the service level agreement (SLA)
- Comparison of service level agreement goals to actual results
- Percentage of remote support interactions
- Percentage of interactions using self-help
- Total cost of ownership
- Average cost per interaction by type
- Average cost per interaction by channel

4.15.6 Identify some of the common customer satisfaction metrics measured by the service desk

(RoK not exclusive)

Examples of common customer satisfaction metrics measured by the service desk include:

- Number and percentage of complaints/negative comments received and outstanding per month
- Number of compliments
- Number of suggestions received each month
- Overall score of event (ongoing) satisfaction surveys returned each month
- Overall score of periodic (annual) satisfaction surveys

4.15.7 Identify some of the common people satisfaction metrics measured by the service desk

(RoK not exclusive)

Examples of common employee satisfaction metrics measured by the service desk include:

- Overall score of the people satisfaction surveys returned
- Staff turnover
- Employee unplanned absence days

4.16 Resource Management

4.16.1 Describe the objective of resource management

(RoK not exclusive)

The objective of resource management is to establish the resource requirements necessary to meet business demands in order to achieve goals

4.16.2 Explain the benefits of resource planning models

(RoK not exclusive)

The benefits of resource planning models is that they:

- Quantify the staffing and scheduling based on accepted operational management models
- Quantify the staffing required to meet the SLA and business needs
- Provide a consistent approach

4.16.3 Summarize the steps involved in resource scheduling

(RoK not exclusive)

The steps involved in resource scheduling include:

- Forecast call volume using historical and current data and information about future requirements
- Establish staffing requirements based on projected volume and service levels
- Develop a schedule
- Evaluate and monitor performance in comparison to projections
- Adjust plans and expectations as necessary

Concept 5 - Tools and Technologies

5.1 Service Desk Infrastructure

5.1.1 Identify technologies used by the service desk

(RoK not exclusive)

Technologies used by the service desk include:

- IT service management systems supporting key processes
 - Telecommunication systems
 - Automated call distribution (ACD)
 - Computer telephony integration (CTI)
 - Interactive voice response (IVR)
 - VoIP
- Work-force optimization systems
- Reporting systems
- Knowledge management system
- Self-service
- Self-healing
- Electronic communications
- Voice biometrics
- Speech analytics
- Process analytics
- Wireless devices
- Network discovery/monitoring tools
- Internet/intranet technology
 - Remote support
 - Social media tools
 - Collaboration tools
 - Video conferencing tools

5.2 Service Management Systems

5.2.1 Describe the purpose of using IT service management systems in a service desk environment

(RoK not exclusive)

The purpose of using IT service management systems is to provide consistent and integrated service operations and service delivery.

5.2.2 Explain the primary objectives for using IT service management tools

(RoK not exclusive)

The primary objectives for using IT service management tools in a service desk environment are to:

- Record, track and manage incidents, problems and changes separately
- Link incidents, problems and changes together and link to configuration items
- Provide process reporting/metrics from a single tool
- Have the capability to add on/activate modules as processes are implemented
- Integrate with system monitoring tools and alert systems
- Provide SLA management and service reporting
- Provide asset and configuration management functionality to store and maintain configuration item records
- Provide and/or integrate with knowledge tools

5.2.3 Identify the benefits for using IT service management tools

(RoK not exclusive)

The benefits of using IT service management tools include:

- The delivery of integrated processes is supported
- An accountable and traceable supporting tool-set is provided
- Consistent service management performance metrics and reports are delivered
- They support continual service improvement

5.3 Telephony

5.3.1 Describe the purpose of an automatic call distributor (ACD) in a service desk environment

(RoK not exclusive)

The purpose of an automatic call distributor (ACD) is to provide a consistent and manageable telephone response operation.

5.3.2 Explain the primary objectives for implementing an ACD system

(RoK not exclusive)

The primary objectives for implementing an ACD system are to:

- Manage the distribution of calls
- Manage analyst performance and work load
- Automate rapid telephone responses
- Provide callers with options and information when on hold

5.3.3 Identify the benefits of implementing an ACD system

(RoK not exclusive)

The benefits of an ACD include facilities, such as:

- Skills-based routing
- First-available analyst, longest available analyst
- Advanced service desk metrics and reporting
- Call queuing

5.4 Computer Telephony Integration (CTI)

5.4.1 Describe the purpose of computer telephony integration (CTI) in a service desk environment

(RoK not exclusive)

The purpose of computer telephony integration in a service desk environment is to integrate telephony equipment with other technologies to facilitate the efficient processing of customer contacts.

5.4.2 Explain the primary objectives of CTI in a service desk environment

(RoK not exclusive)

The primary objectives of CTI in a service desk environment are to:

- Identify callers to analysts, for example, the screen is populated the caller's contact details
- Display customer specific data to support staff automatically
- View customer/management statistics and reporting data across multiple platforms
- Apply business rules for delivering personalized service; for example, routing to a specific individual or team

5.4.3 Explain common challenges encountered when implementing CTI

(RoK not exclusive)

Common challenges encountered when implementing CTI include:

- The potential complexity and cost
- The screen population facility might delay the time it takes the service desk to answer calls causing average speed to answer (ASA) to increase
- Accurate databases are required to support screen population and call routing

5.4.4 Identify the benefits of CTI in a service desk environment

(RoK not exclusive)

The benefits of CTI in a service desk environment include:

- Improved efficiency
- Can automate fast responses and resolutions
- Analysts have rapid and dynamic access to customer details without asking customers
- Delivers a professional customer service experience

5.5 Support Delivery Tools and Methodologies

5.5.1 Identify the most common tools and methodologies for delivering service

(RoK not exclusive)

The most common tools and methodologies used by the service desk for delivering service are:

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

5.6 Telephone Support

5.6.1 Describe the purpose of telephone support delivery in the service desk environment

(RoK not exclusive)

The purpose of telephone support is to:

- Provide first-line support, although it might also provide second-line support
- Build relationships with customers through direct interaction

5.6.2 Identify the benefits of telephone support as a service delivery method

(RoK not exclusive)

The benefits of delivering support by telephone include:

- Rapid access to service desk staff
- Interactive two-way communication

5.7 On-site (Desk-side) Support

5.7.1 Describe the purpose of on-site (desk-side) support in a service desk environment

(RoK not exclusive)

On-site (desk-side) support is typically used when the incident or service request cannot be resolved remotely. Its purpose is to provide a support professional to visit a customer's physical location to respond to an incident or service request.

5.7.2 Identify the benefits of using desk-side support as a service delivery method

(RoK not exclusive)

The benefits of desk-side support delivery include:

- One-to-one and face-to-face communication with customers establishes better rapport
- Support analysts can view the environment from the customer's perspective
- A better understanding of the customer's situation/environment is achieved

5.8 Electronic Support Tools

5.8.1 Describe the principal purposes of using electronic support tools in a service desk environment

(RoK not exclusive)

The principal purposes of using electronic support tools, such as remote support, instant messaging, e-mail, - live chat and social media is :

- Restore the customer's technology to a functioning state
- Overcome communication barriers
- Enhance the customer and service desk relationship

5.8.2 Explain the primary objectives of using electronic support delivery tools in a service desk environment

(RoK not exclusive)

The primary objectives of using electronic support delivery tools in a service desk environment are to:

- Improve first contact resolution rate
- Reduce the number of escalated calls
- Reduce lost customer productivity by reducing time to resolution

5.8.3 Identify the benefits of using electronic support delivery tools in a service desk environment

(RoK not exclusive)

The primary benefits of using electronic support delivery tools in a service desk environment include:

- A reduced unit costs (cost per service request/incident)
- Increased numbers of incidents and service requests resolved per analyst
- Analysts see what customers see (remote support)
- Provides an opportunity for analysts to educate customers to be more self-sufficient
- Provides an element of governance
- The potential to restore services faster
- The potential to improve customer satisfaction

5.9 Self-service

5.9.1 Describe IT self-service

(RoK not exclusive)

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

5.9.2 Explain the purpose of IT self-service

(RoK not exclusive)

The purpose of IT self-service is to reduce the cost of support while extending support beyond the service desk's operating hours and to reduce the number of inbound interactions for simple incidents and service requests and to enhance the customer experience.

5.9.3 Explain the primary objectives of IT self-service

(RoK not exclusive)

The primary objectives of self-service are to provide customers with the ability to:

- Log and track the status of their incidents and service requests update their contact details
- Update information contained in incident or service request records
- Obtain notification about outages and upcoming scheduled changes and maintenance
- To obtain information to resolve simple issues themselves (self-help)

5.9.4 Explain the benefits of using IT self-service as a service delivery method

(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 log and check the status of their current incidents or service requests
- Support resources can focus on other issues

5.9.5 Explain the primary objectives of self-help

(RoK not exclusive)

The primary objectives of self-help are to provide customers with access to service without the assistance of an analyst, such as:

- Access to basic support tools, for example:
 - Simple incident resolution
 - Automated password resets
- Access to documentation, for example, self-help manuals policies and procedures, SLAs
- Access to training and on-line tutorials to improve customers' IT knowledge
- Access to on-line knowledge bases
- Access to on-line documentation, for example, processes, policies, procedures, SLAs, FAQs,
- Access to technical instructions, such as software usage and installations

5.9.6 Identify the benefits of using self-help as a service delivery method

(RoK not exclusive)

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

- Offers faster incident or service request resolution
- Enables customers to resolve simple incidents without the assistance of an analyst, for example, password resets, adding printers
- Enables independence and self-sufficiency
- Provides cost effective and consistent responses to repetitive service requests
- Has the potential to improve customer satisfaction and productivity
- Empowers customers and improves their experience

5.10 Self-healing

5.10.1 Describe the purpose of self-healing tools

(RoK not exclusive)

The purpose of self-healing tools is:

- Resolve incidents and problems dynamically and automatically without customers needing to report them
- Provide systems that can identify their own errors and correct them without human intervention
- Provide proactive monitoring and alerting of service outages

5.10.2 Explain the primary objectives of self-healing tools in a service desk environment

(RoK not exclusive)

The primary objectives of self-healing tools are to:

- Recognize when an event has occurred and initiate predetermined actions and responses
- Recognize system failure conditions and initiate corrective actions to restore a system to a functioning state
- Recognize corruption and restore the system from a backup
- Automatically reset applications
- Automatically run anti-virus applications
- Automatically update registry settings
- Automatically reset key files every time a customer executes an application

5.10.3 Identify the benefits of using self-healing as a service delivery method

(RoK not exclusive)

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

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

5.11 Cloud Computing

5.11.1 Explain the meaning of cloud computing

(RoK not exclusive)

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

The four 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) facilitating applications to be deployed directly by subscribers
- 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
- Business Process-as-a-Service (BPaaS) - usually offers a combination of other pay-as-you-go 'as-a-Service' offerings. A supplier organization will provide business services to multiple customers to provide extra capacity when needed; for example, call center, HR or payroll processing

5.12 Social Media and Social Collaboration

5.12.1 Describe social media

(RoK not exclusive)

Social media is the use of technology combined with social interaction to create on-line communities, share knowledge and connect people to information faster; for example forums, on-line communities, blogs, podcasts.

Social media:

- Comprises primarily internet and mobile tools using words, pictures, audio and video
- Transforms people from content consumers into content producers
- Enables organizations to build on-line communities in order to develop collaborative relationships with stakeholders

5.12.2 Describe social collaboration

(RoK not exclusive)

Social collaboration refers to tools and processes that help multiple people interact and share information to achieve any common goal, commonly using digital technologies.

- Participants share a mutual understanding and respect for each other
- The group includes representatives from each segment of the community who will be affected by its activities
- Participants believe they will benefit from their involvement and that the advantages of the collaboration will offset costs

5.12.3 Identify service desk productivity improvements associated with social media and social collaboration tools

(RoK not exclusive)

Productivity improvements associated with social media and collaboration tools include:

- Breaks down silos of knowledge in the IT community
- Collaboration, knowledge and sharing ideas leads to innovation
- Faster incident identification using real-time monitoring and customer call logging
- Improved IT/business collaboration, for example, virtual change advisory board (CAB)
- Immediate access to knowledge empowers the customer community
- Knowledge sharing reduces calls or requests to the service desk
- Faster dissemination of service updates and relevant news

5.12.4 Identify tactics for developing a social media and social collaboration policy for the service desk

(RoK not exclusive)

To assist in developing a social media and social collaboration policy:

- Represent the service desk in organizational social media and social collaboration policy development initiatives
- Consider the training requirements for service desk staff
- Consider the effect of the policy on current service desk processes and procedures
- Consider risk factors such as to brand and reputation
- Consider the effect of the policy on data security

5.12.5 Summarize the risk factors and security issues associated with social media and social collaboration

(RoK not exclusive)

The risks factors and security issues encountered when using social media tools include:

- Malicious code and virus distribution
- Spam, phishing, vishing and hacking
- Fraud
- Negative comments or feedback in the public domain
- Employee productivity
- Sharing of confidential information
- Use of sites that might be blocked by the organization's firewalls
- Confidence and skill of employees
- Not using the right tool for the customers/audience

Concept 6 - Human Resources and Team Development

6.1 Recruitment

6.1.1 Identify requirements for effective service desk recruitment

(RoK not exclusive)

The requirements for effective service desk recruitment include:

- Identify the competencies necessary for the position
- Ensure job descriptions and role profiles are up to date and properly reflect the activities the candidate will be required to perform
- Perform a skills gap analysis
- Identify the appropriate salary for the position
- Follow the organization's recruitment processes and procedures

6.1.2 Identify the elements included in a recruitment process

(RoK not exclusive)

Examples of the elements included in a recruitment process are:

- Application review
- Short list for interview based on objective criteria
- A structured and defined interviewing processes
- Model team members are involved in the interview and selection process
- Telephone interviews are performed
- References are verified
- Relevant techniques for evaluating skills are employed

6.1.3 Identify qualities and skills to look for in staff

(RoK not exclusive)

Qualities and skills to look for when recruiting staff include:

- Attributes (qualities):
 - Accepts change and adapts easily
 - Learns quickly
 - Multi-tasks
 - Good temperament (patient, empathetic)
 - Problem-solver
 - Customer service ethos
 - Accepts personal accountability
 - Self-motivated
 - Team player
 - Follows policies, procedures and guidelines
 - Continually improves
 - Calm under pressure
- Skills (abilities):
 - Communication
 - Listening
 - Writing
 - Verbal
 - Non-verbal
 - Questioning
 - Knowledge
 - Technical
 - Business
 - ITSM (useful)
 - Customer service
 - Troubleshooting
 - Problem solving
 - Time management
 - Personal organizational skills

6.2 Staff Induction and Training

6.2.1 Describe the features of a structured induction planning process

(RoK not exclusive)

The features of a structured induction planning process for IT and service desk staff include:

- A task list of key pre-induction activities, such as set up logins, plan the staffing rota
- A standard agenda of key points to cover, such as:
 - The organization's goals
 - The organization's structure
 - Key contacts
 - Human resources and employment issues
 - IT goals
 - IT services
 - Service level agreements
 - IT security
 - The organization's policies, processes and procedures
 - Customers
 - IT contacts
 - Technical data
- Defining milestones and scheduling regular process reviews
- Agreeing the key individuals to be involved in the process
- Reviewing the mechanism of the process and the ownership of the content

6.2.2 Describe the benefits of a structured approach to induction

(RoK not exclusive)

The primary benefits of a structured approach to induction include:

- Reduced time to get new staff working effectively
- Reduced risk of basic errors and misunderstandings
- Reduced risk of adopting bad habits
- A focus on coordinated activities improves communications across departments

6.2.3 Describe the features of a structured approach to training

(RoK not exclusive)

The features of a structured approach to training include:

- A structured training plan for all service desk staff is in place
- A skills matrix of soft and technical skills is in place for all staff
- A training budget is in place with a set allocation for staff training days
- A training plan linked to the job role and KPIs, plus career goals
- The training plan is reviewed by staff and manager at least annually
- Feedback from reviews and appraisals is used to develop practical training programs
- Feedback from reviews and appraisals is held in human resource records and reviewed annually
- A review mechanism of the induction process is in place and ownership of the content is identified

6.2.4 Describe the benefits of a structured approach to training

(RoK not exclusive)

The primary benefits of a structured approach to training are:

- Up-to-date knowledge and skills
- Improved staff productivity and consistency
- Reduced risk of errors and failures
- Reduced cost of failures
- More effective use of training budget
- Improved morale
- Improved job satisfaction

6.3 Retention

6.3.1 Demonstrate the behaviors for creating a positive working environment

(RoK not exclusive)

Behaviors for creating a positive working environment include:

- Treat everyone with respect
- Recognize team and individual accomplishments
- Communicate team goals and successes
- Communicate and celebrate success
- Offer a competitive benefits package
- Involve employees in decision making
- Seek feedback
- Create learning opportunities
- Create a sense of belonging
- Share information
- Consider offering flexible work schedules

6.3.2 Demonstrate the behaviors for achieving long-term working relationships with members of your staff

(RoK not exclusive)

Behaviors for achieving long-term working relationships with members of your staff include:

- Treat team members with respect
- Treat all staff fairly
- Review the team's structure for opportunities to make best use of the skills of team members
- Provide opportunities for staff to use a variety of skills
- Delegate authority for decision making where appropriate
- Be consistent
- Be supportive in order to facilitate optimum performance
- Evaluate and develop the performance of team members
- Build a skills matrix of staff with their target and actual skills levels in order to develop a training plan
- Provide career and personal development opportunities
- Encourage feedback and new ideas from staff

6.3.3 Describe how to constructively address individual performance issues

(RoK not exclusive)

To constructively address individual performance issues:

- Ensure the organization's policies are followed
- Handle issues in a timely manner
- Be specific and not general in your discussions
- Discuss the causes of the issue before the solution
- Keep the focus of the discussion on the specific issue/behavior
- Explain to the individual the importance of change to them and to the team
- Discuss the potential growth opportunities implicit in change
- Focus on changing the behavior rather than changing the person
- Communicate the desired outcome of the change in behavior
- Document follow-up actions

6.3.4 Employ methods for gathering the information required to measure employee satisfaction information

(RoK not exclusive)

Methods for gathering employee satisfaction information for analysis include:

- Structured feedback mechanisms (internal surveys, appraisal process)
- Regular 'one-to-ones' with staff and managers
- Feedback from team discussions
- Informal and social interaction
- Observing changes in team and individual performance
- Keeping staff morale as a regular item at management meetings
- Regular reviews of absenteeism data
- Exit interviews

6.4 Management

6.4.1 Describe the characteristics of effective management

(RoK not exclusive)

The characteristics of effective management include:

- The mission is successfully implemented
- Tactical and strategic views are evident and planning takes place
- Work is performed correctly
- People are encouraged to take on additional responsibility
- Effective procedures are developed and implemented
- The service desk and the organization's business is effectively promoted

6.4.2 Identify the major activities of a manager

(RoK not exclusive)

The major activities of a manager are :

- Plan
- Organize resources
- Direct, control and co-ordinate activities

6.4.3 Explain the different types of planning methods

(RoK not exclusive)

The types of planning methods are:

- Strategic planning - long-term vision of what an organization needs to achieve in order to meet its objectives
- Tactical planning - the detailed plan for achieving the objectives set by the strategic plan
- Operational planning - the day-to-day work routine that focuses on operational tasks and long-term projects

6.4.4 List the elements required for developing successful plans

(RoK not exclusive)

The elements required for developing successful plans include:

- Define the mission objectives
- Develop short, medium and long term objectives designed to help meet strategic goals
- Assess and manage risks
- Set goals and objectives
- Set budgets
- Review and develop new processes and service improvement plans

6.4.5 Demonstrate how to successfully organize resources

(RoK not exclusive)

To successfully organize resources:

- Define the appropriate structure
- Identify resource requirements
- Align resources to projects, processes and activities
- Identify required skills
- Ensure that resources are in the right place, with the correct skills and attitude, at the right time

6.4.6 Describe how to direct, control and co-ordinate activities

(RoK not exclusive)

To direct, control and co-ordinate activities:

- Set the direction, influence the team, and individuals
- Delegate and empower where appropriate
- Prioritize tasks appropriately
- Provide guidance when required
- Obtain feedback, analyze and recommend:
 - Processes
 - Procedures
 - Systems
 - Resources
- Monitor, review and report against agreed measures

6.5 Leadership

6.5.1 Recognize the characteristics of good leaders

(RoK not exclusive)

Good leaders :

- Recognize the difference between leadership and management
- Define and communicate the vision and strategic direction to staff
- Create an environment in which staff feel confident to make decisions and take ownership
- Lead by example
- Delegate appropriately
- Display trust
- Share information appropriately
- Maintain a positive perspective
- Inspire service desk staff to undertake activities to achieve success
- Motivate and mentor
- Encourage participation
- Discourage one person from dominating the team
- Provide effective incentives
- Delegate effectively
- Encourage creativity and initiative in others
- Practice and encourage fairness
- Make decisions, even when they might be unpopular
- Execute plans successfully
- Demand more from themselves than from others
- Practice and encourage continual personal development
- Assess and work with differing needs and abilities of their staff
- Demonstrate effective, clear and concise communication skills

6.5.2 Explain the benefits of motivation

(RoK not exclusive)

The benefits of motivation include:

- Innovation is encouraged
- People are inspired to achieve new visions
- Inspires delivery of consistent, high-quality service
- Commitment to the aspirations of the service desk
- Improves staff development and direction

6.5.3 Describe methods to improve service desk performance

(RoK not exclusive)

Methods for improving service desk performance include:

- Review and analyze past successes to identify strengths, weaknesses, opportunities, and threats (SWOT) in order to identify areas for growth
- Implement continual improvement programs
- Develop programs that reward initiative
- Test staff on their usage and understanding of the activities, policies, processes and procedures required to fulfill their role
- Set challenging, achievable goals
- Benchmark with best practices and/or other service desks

6.5.4 Describe how to recognize and reward staff

(RoK not exclusive)

To recognize and reward staff:

- Highlight individual and team contributions individually and publicly
- Recognize and publicize in a manner meaningful to the recipient
- Reinforce and recognize desired behaviors in a timely manner
- Consistent and fair recognition and reward programs
- Work creatively within the organization's guidelines

6.5.5 Describe ways to provide direction and focus during challenging circumstances, such as major incidents or periods of uncertainty

(RoK not exclusive)

Examples of ways to provide direction and focus during ambiguous or chaotic circumstances include:

- Create a communication hub so that people can get accurate information quickly
- Empathize with team members
- Use your presence to help provide clarity and direction
- Create an environment in which team members can experience a sense of continuity and control in their work lives

6.6 Teamwork

6.6.1 Describe the objective and the components of teamwork

(RoK not exclusive)

The objective of teamwork is to work together to achieve common goals.

The components of teamwork include:

- Work together to share ideas
- Actively listen to each other
- Share the workload fairly

6.6.2 Identify the characteristics of an effective team player

(RoK not exclusive)

An effective team player:

- Participates in team activities
- Displays courtesy and respect for others
- Collaborates with team members
- Is open-minded to the ideas of others
- Shares knowledge
- Contributes to and solicits ideas of others
- Maintains a positive attitude
- Has effective communication skills
- Is enthusiastic
- Is flexible
- Is dependable
- Trusts others
- Offers encouragement
- Follows through on tasks
- Shares the workload fairly
- Resolves conflicts

6.6.3 List the characteristics of an effective team

(RoK not exclusive)

An effective team:

- Has clear goals/objectives that support the strategies of the business and IT
- Is empowered to make decisions
- Displays a sense of participation
- Has high productivity
- Has good morale and motivation
- Has multiple and varied skills
- Has effective conflict resolution policies
- Has a unified commitment
- Meets agreed objectives and targets

6.6.4 Explain the benefits of having an effective team

(RoK not exclusive)

The benefits of having an effective team include:

- An increased sense of belonging
- A willingness to collaborate with and assist other team members
- Improved productivity
- Friendly and supportive work environment
- Increased customer satisfaction
- An environment of mutual trust and accountability

6.6.5 Describe a typical friendly and supportive workplace environment

(RoK not exclusive)

In a typical friendly and supportive workplace there is:

- Rapport demonstrated among the members of the team
- Evidence of empowerment from management
- A clear willingness within the team to collaborate with and assist other team members
- Responsible and trustworthy team members
- A diverse blend of team members
- Interest in each other's development is demonstrated

6.7 Professional Development

6.7.1 Identify methods for assessing the development needs of the service desk and service desk staff

(RoK not exclusive)

Methods for assessing development needs of service desk staff include:

- Skills gap analysis
- Role profiling
- One-to-ones
- Individual assessment (appraisal)
- SWOT analysis
- Informal feedback from other individuals or teams
- 360 degree or peer assessment

6.7.2 Identify examples of common methods used for professionally developing staff

(RoK not exclusive)

Examples of common methods used to professionally develop staff include:

- On-the-job, computer-based training and instructor-led training
- Virtual training
- Provide staff with access to formal and informal training resources
- Coaching
- Mentoring
- Secondment to other teams/departments
- Continual improvement program
- The achievement of relevant industry qualifications
- Attending relevant conferences and seminars

6.7.3 Describe how to maintain and enhance personal development

(RoK not exclusive)

To maintain and enhance personal development:

- Create a personal network of advisers with whom you can share problems and concerns
- Concentrate on common goals during times of disagreement
- Take on projects that are outside your comfort zone
- Read management/motivation books and industry publications
- Join and participate in professional organizations
- Attending relevant conferences and seminars

6.8 Coaching

6.8.1 Describe coaching

(RoK not exclusive)

Coaching is a process of learning and developing competent performance in the workplace - usually in the form of regular structured sessions between a suitable coach and a 'coachee' in order to explore current competency levels, issues, attainments, ideas and possibilities. It is performance and task-related and aims to:

- Establish specific, short-term objectives and outcomes
- Develop potential or change behavior
- Help establish individual performance goals
- Help define the current position in relation to goals
- Identify the opportunities to achieve the goals
- Establish the will to undertake the required actions to achieve the goals

6.8.2 Explain the benefits of coaching

(RoK not exclusive)

The benefits of coaching include:

- Improved professionalism and morale
- Improved customer service and engagement quality
- Helps the team to grow and excel
- Improved performance leading to increased productivity by focusing on skills and core competencies at or above the standard required by the organization

6.8.3 Describe how to prepare to coach an analyst

(RoK not exclusive)

To prepare to coach an analyst:

- Assess the employee's abilities, competencies and commitment level
- Identify the goals and issues
- Define the coaching plan

6.8.4 Describe the coaching process

(RoK not exclusive)

The coaching process:

- Create an environment of trust
- Define and communicate the reason for the coaching session
- Begin a dialogue on ways to improve or excel
- Listen with empathy
- Encourage participation in the process by asking open questions
- Test understanding
- Use the analysts' suggestions whenever possible
- Agree on an action plan: who will do what and when
- Schedule a follow-up meeting within an appropriate timeframe

6.8.5 Display the characteristics of an effective coach

(RoK not exclusive)

An effective coach:

- Takes the time to listen and learn about the coachee:
 - Career goals
 - Strengths and weaknesses
 - Career timetable
 - Opinion of own competency and ability
- Recognizes the difference between coach, trainer and manager
- Resists forcing the competence required by imposing their values on the coachee
- Allows the coachee to arrive at conclusions the coach already knows
- Creates an action plan with each individual
- Follows up to discuss progress and help fulfill the coachee's potential

6.9 Mentoring

6.9.1 Describe mentoring

(RoK not exclusive)

Mentoring is a supportive learning experience in which an experienced person shares the benefits of their knowledge, experience and wisdom. They might act as a role model, guide, tutor, confidante, supporter or friend. Mentoring is a long term approach requiring mutual trust.

6.9.2 Explain the benefits of mentoring

(RoK not exclusive)

The benefits of mentoring:

- People learn more quickly
- Strengthens self-development
- Provides help for the immediate challenges of the mentee
- Develops inter-personal skills
- Helps people cope with their role
- Offers a safe environment for discussion and advice

6.9.3 Describe the benefits of peer mentoring (buddying)

(RoK not exclusive)

The benefits of peer mentoring include:

- Builds a sense of community
- Reduces time for new members to reach competency
- Increases trust and respect among team members
- Supports colleagues in their professional development and growth
- Facilitates mutual learning
- Provides functional cross-training
- Maintains a good balance of skills
- Simplifies integration into a team
- Improves performance, leads to increased productivity by focusing on skills and competencies at a personal level

6.10 Stress Management

6.10.1 Describe stress

(RoK not exclusive)

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

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

6.10.2 Identify some of the signs of the positive and negative stress

(RoK not exclusive)

Some of the signs of the positive and negative effects of stress are:

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

6.10.3 Identify some common causes of stress at work

(RoK not exclusive)

Some common causes of stress at work are:

- 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
- Lack of self-confidence
- Insufficient rest

6.10.4 Describe techniques for managing stress

(RoK not exclusive)

Some of the recognized ways to manage stress are:

- Prioritize and organize your work
- Identify sources of stress
- Identify the signs of stress in yourself and others
- Share your concerns
- Accept what you cannot change
- Ensure adequate breaks are taken
- Make time for fun and relaxation
- Maintain a healthy work-life balance
- Engage in diverse activities outside work

6.10.5 Recognize the positive effects of stress

(RoK not exclusive)

The positive effects of stress include:

- Motivation and energy
- Increased productivity
- Optimized performance levels
- Increased drive to get work done

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