



Service Desk Analyst (SDA)

Professional Standard

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SDI® Service Desk Manager Standard v8.0

SDI® Service Desk Analyst (SDA)

Contents	Page
About SDI	3
Acknowledgements	4
SDI Service Desk Analyst Professional Standard Introduction	5
Purpose	6
Qualification Objectives	6
Qualification Target Audience	7
Prerequisites for Taking the Exam	7
Qualification Structure & Weighting	7
SDA Professional Standard	
Professionalism	8
Analyst Skills	20
Processes, Practices and Procedures	42
Resources	72

SDI® Service Desk Institute

About SDI

The Service Desk Institute (SDI) produces internationally recognised standards for service desk and IT support professionals which set out clear definitions for the key service desk roles of both the Service Desk Analyst and Service Desk Manager.

These internationally recognised standards created by industry experts from around the world form the basis of SDI's Service Desk Manager (SDM) and Service Desk Analyst (SDA) training courses and exams, managed by Peoplecert.

SDI also produce the Global Best Practice Standard for Service Desk (Best Practice Standard), of which the SDA and SDM Professional Standards are aligned.

First introduced in 2000, the Global Best Practice Standard for Service Desk (Best Practice Standard) is the only globally recognized standard created specifically for service desks. Designed to improve the effectiveness of IT service and support, the Best Practice Standard provides a quality reference model that is recognized as the industry standard worldwide.

Based on existing international quality reference models such as the EFQM Excellence Model and ISO 9000 this standard provides clear, practical, and measurable best practice criteria for the service desk, much of which is not included in ITIL® or ISO/IEC 20000. Indeed, many organizations look to comply with SDI's Best Practice Standard in order to complement and prepare themselves for the broader scope presented by ISO/IEC 20000.

This globally recognized Best Practice Standard provides a means to assess a service desk's maturity in order to improve its effectiveness and demonstrate its value to the organization.

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SDI® Service Desk Analyst (SDA) Professional Standard

Introduction

This document contains the SDI Service Desk Analyst (SDA) Professional 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 Professional Standard is published in order to allow organizations to use them 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 organizations have developed the Standard, and that the Standard is recognized in the global market.

Industry – refers to the service and support industry, which focuses on the internal support of information technology, external support organizations, shared service environments and service providers.

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

SDI is committed to defining standards for support professional roles. In today's business environment, customers want educated and qualified professionals to support their business needs.

SDI qualifications provide:

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

Purpose

The Service Desk Analyst (SDA) exam is based on the Service Desk Analyst (SDA) Professional Standard.

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

- Establish an international benchmark that recognize and develops the breadth of knowledge required to successfully fulfil relevant roles
- Document the skills needed to deliver consistent, high quality service and support
- Provide a mechanism, aligned to international industry standards, for the development of people working in the IT service and support industry
- Provide leadership to the IT service and support industry by providing professional qualifications in IT service and support

The SDI Service Desk Analyst (SDA) Professional Standard qualification is an open qualification that is independent of any other training curriculum. SDI is the administrator, facilitator and arbitrator of the Service Desk Manager (SDA) Professional Standard. The exams are independently administered and proctored by PeopleCert.

Qualification Objectives

The SDI Service Desk Analyst (SDA) Professional Standard defines the skills required by service desk analysts. The Service Desk Analyst (SDA) Professional Standard qualification recognizes an individual's knowledge of customer service and support competencies and certifies that they have the skills required to work within the IT service and support industry. Individuals passing an SDI exam can be expected to:

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

Name of the Qualification:

SDI Service Desk Analyst (SDA)

Qualification Target Audience

The Service Desk Analyst (SDA) qualification course is for front-line IT service and support analysts with some experience working in a service desk environment. This course will help analysts who are looking to grow in their role and gain a recognized qualification in their profession, develop practical skills while earning a certificate that endorses their commitment and knowledge.

Individuals interested in achieving the Service Desk Analyst (SDA) qualification will come from all industry sectors across a range of large, medium and small sized service desks. They will have a desire for their knowledge of the important topics covered in the Service Desk Analyst (SDA) Professional Standard to be recognized in order to pursue employment and advancement opportunities in the IT service and support industry.

Prerequisites for Taking the Exam

Prerequisites for passing the exam will include a working knowledge and understanding of the demands placed on a service desk, the standard process requirements for many support operations and the technology available to service desk staff. Individuals should not attempt to take the exam unless they:

- Have a working knowledge of the IT service and support industry
- Have a working knowledge of the Service Desk Analyst (SDA) Professional Standard
- Have a desire to work within an IT service and support role
- Have attended the Service Desk Analyst (SDA) qualification course delivered by a PeopleCert accredited training organization

Qualification Structure and Weighting

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

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
1.1 The Service Desk	1.1.1 Explain the purpose of the service desk	The purpose of the service desk is to serve as the entry point and on-going single point of contact (SPOC) for all IT support related interactions.
	1.1.2 Identify the activities of the service desk that demonstrate its value	<p>The activities of the service desk are:</p> <ul style="list-style-type: none"> • Deliver services that support business objectives and outcomes • Ensure customer interactions are managed efficiently and effectively • Provide a clear communication channel between customers and the IT organization • Manage customer expectations • Identify and initiate service improvement initiatives • Set the standard of behavior for customer engagement • Adhere to the organization's policies and processes and develop effective procedures • Adhere to, promote and support the organization's information security policies • Manage feedback relating to IT service and support delivery issues • Contribute to knowledge creation and maintenance • Promote a culture of continual improvement

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.1.3 Explain the role of service desk leadership & management	<p>The role of service desk leadership and management is to:</p> <ul style="list-style-type: none"> • Promote the value of the service desk to the organization • Lead inspire and manage the team effectively • Set and communicate service desk goals and targets that align with the organization's business objectives • Recruit and develop individuals in line with organizational requirements • Ensure that service desk activities are integrated with all relevant practices and processes • Ensure that service quality is managed through effective governance • Understand the quality and cost effectiveness of service provision • Encourage a culture of continual improvement • Represent the service desk at strategic and operational levels
1.2 The Service Desk Analyst	1.2.1 Explain the role of the Service Desk Analyst	<p>The role of the Service Desk Analyst is:</p> <ul style="list-style-type: none"> • Professionally represent the IT organization to the customer • Act as the voice of the customer to the IT organization • Consistently deliver a quality customer experience

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.2.2 Identify the responsibilities of the Service Desk Analyst	<p>The responsibilities of the Service Desk Analyst are to:</p> <ul style="list-style-type: none"> • Manage the customer experience and expectations throughout the life cycle of service desk interactions • Provide appropriate levels of support in line with service desk policies and procedures • Document customer interactions accurately and consistently • Maintain and share knowledge of supported products and services • Ensure service consistency by following policies, processes, and procedures • Communicate effectively with all stakeholders • Promote products and services that are available • Maintain an understanding of the whole organization and customers of the service desk
1.3 Best Practice	1.3.1 Identify sources of service desk and IT methodologies and best practice	<p>Sources of service desk and IT methodologies and best practice include but are not limited to:</p> <ul style="list-style-type: none"> • SDI Global Best Practice Standard for Service Desk • ITIL® Framework • ISO/IEC 20001 – IT Service Management • ISO 9001 – Quality Management Systems • ISO/IEC 27001 – Information Security Management Systems • DevOps • SIAM • Agile • Lean

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.3.2 Maintain knowledge of IT standards, frameworks, and methodologies	<p>Methods for maintaining knowledge of industry best practice include:</p> <ul style="list-style-type: none"> • Attend courses, seminars, and industry events • Subscribe to industry related publications • Join and participate in industry related groups
1.4 Policies and Governance	1.4.1 Understand the purpose of organizational policies	<p>The purpose of organizational policies includes:</p> <ul style="list-style-type: none"> • Setting clear expectations and boundaries employees must work within • Delivering service and support within corporate and legal parameters • Protecting the organization from litigation • Providing a safe working environment • Protecting data • Avoiding damage to business reputation
	1.4.2 Identify some examples of areas covered by organizational policies	<p>Some examples of areas covered by organizational policies include but are not restricted to:</p> <ul style="list-style-type: none"> • Health and safety • Environmental protection • Diversity and inclusion • Acceptable behavior • Information security and data protection • Acceptable use of IT equipment

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
1.5 Personal Accountability	1.5.1 Explain personal accountability	<p>Personal accountability means to:</p> <ul style="list-style-type: none"> • Take ownership of customer interactions • Be open, fair, and honest • Be an effective team member • Admit to mistakes and errors openly and honestly • Be on time • Adhere to the organization's behavioral guidelines and demonstrate organizational values
	1.5.2 Explain why following best practice and documented processes and procedures benefits customers and the service desk	<p>Following best practice and documented processes and procedures:</p> <ul style="list-style-type: none"> • Improves the quality of the service • Delivers a consistent customer experience • Contributes to improved efficiencies and productivity • Establishes credibility for analysts and the service desk
	1.5.3 Identify the importance of making and honoring commitments	<p>To make and honor commitments:</p> <ul style="list-style-type: none"> • Establishes credibility for individuals, the team, and the organization • Improves employee morale • Builds trust and customer confidence

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.5.4 Describe how to protect and enhance the image of the service desk	<p>To protect and enhance the image of the organization:</p> <ul style="list-style-type: none"> • Keep customers advised of the steps being taken to resolve their issue • Give customers accurate information without blaming other organizations or departments • Focus the customer on the resolution of the issue • Demonstrate professionalism and promote positive results to increase customer confidence in the service desk • Be aware of personal conduct outside of the service desk and the work environment that could affect the organization's image • Engage with customers and colleagues to build and maintain relationships
1.6 Service Attitude	1.6.1 Explain the terms: attributes, skills and knowledge	<p>Attribute:</p> <ul style="list-style-type: none"> • A quality, trait or characteristic <p>Skill:</p> <ul style="list-style-type: none"> • The ability to do something well <p>Knowledge:</p> <ul style="list-style-type: none"> • The awareness or possession of information

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.6.2 List the characteristics of a good service attitude	<p>The characteristics of a good service attitude:</p> <ul style="list-style-type: none"> • Take ownership of issues and efficiently monitor them through to resolution • Be accountable and responsible for your actions • Convey a sincere willingness to help • Maintain a positive attitude • Treat all customers with respect and courtesy • Focus attention on the customer • Focus on your organization's business needs while providing customers with the best possible service
	1.6.3 Recognize the impact of a good service attitude	<p>The impact of a good service attitude:</p> <ul style="list-style-type: none"> • Sets expectations for a positive customer experience • Creates a positive perception of the service desk • Helps to gain the customer's confidence and trust • Builds rapport that encourages customers to return • A good service attitude is contagious • Enhances the customer experience

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.6.4 Describe the skills required to deliver excellent customer service	<p>The skills required to provide excellent customer service include:</p> <ul style="list-style-type: none"> • Listening to the customer • Conveying empathy • Realizing that customer needs and expectations may differ • Applying processes and procedures appropriately • Encouraging excellent customer service in others • Honoring commitments made
1.7 Teamwork	1.7.1 Recognize the basic concepts of teamwork	<p>The basic concepts of teamwork include:</p> <ul style="list-style-type: none"> • Working together to accomplish common goals • Knowledge and resources are shared to the benefit of the team • Actively listening to other team members • Staff expressing appreciation and acknowledgement of the contribution of others • Working with and building relationships with other teams • Recognizing and effectively utilizing the different strengths and skills of individuals within a team

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.7.2 Describe the responsibilities of people working in a team environment	<p>The responsibilities of people working in a team environment are to:</p> <ul style="list-style-type: none"> • Engage, contribute, and collaborate in team activities • Respect other team members • Be open-minded to other team members' ideas • Be punctual • Share knowledge • Take personal accountability for actions • Raise concerns and challenges respectfully and constructively
	1.7.3 List the benefits of teamwork	<p>The benefits of teamwork include:</p> <ul style="list-style-type: none"> • Team members buy in to team decisions • Improved morale, motivation, and job satisfaction • Increased flexibility of team members • Delivering a consistent quality of service • Building a knowledgeable team with the skills required to support a wide range of products • Improving the capabilities of the team

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.7.4 List the characteristics of an effective team	<p>Successful teams:</p> <ul style="list-style-type: none"> • Achieve goals and meet targets, objectives, and customer expectations • Demonstrate trust • Contribute to and share knowledge • Receive effective support and direction from management and leadership • Support internal skills development • Recognize team and individual achievements • Communicate effectively inside and outside the team • Maintain processes and procedures to ensure service quality • Are encouraged to participate in decision making • Are valued by stakeholders
	1.7.5 List the features found in a supportive workplace	<p>Examples of features found in a supportive workplace include:</p> <ul style="list-style-type: none"> • Rapport among team members • Empowerment from management • Willingness to help each other • Continual service improvement practices are embedded <p>Team members:</p> <ul style="list-style-type: none"> • Are responsible and reliable • Learn from one another • Share knowledge

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
1.8 Business Relationships	1.8.1 List behaviors for establishing and maintaining effective relationships	<p>To establish effective relationships with others in your organization:</p> <ul style="list-style-type: none"> • Treat everyone with respect and courtesy • Focus on positive outcomes • Understand the roles and responsibilities of other teams • Explain the role and responsibilities of your team to stakeholders • Share information and knowledge
	1.8.2 List behaviors for establishing effective relationships with customers	<p>To establish effective relationships with customers:</p> <ul style="list-style-type: none"> • Understand their needs and manage their expectations • Build rapport • Be consistent • Have an understanding of their business • Maintain a positive attitude • Take ownership • Be confident • Use an appropriate communication method
1.9 Cultural Awareness	1.9.1 Demonstrate sensitivity and respect for other cultures	<p>To be sensitive to and respect other cultures:</p> <ul style="list-style-type: none"> • Accept and respect the value of different approaches • Acknowledge and understand the impact of unconscious bias • Avoid imposing your own values and beliefs • Recognize the value of cultural diversity

1. Professionalism		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.9.2 Practice techniques for communicating cross-culturally	To communicate effectively across cultures: <ul style="list-style-type: none"> • Identify appropriate channels of communication • Use appropriate and clear language • Check your understanding more often than usual • Seek assistance if you have difficulty communicating

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.1 Communication	2.1.1 Describe ways people communicate	<p>Methods of communication include:</p> <ul style="list-style-type: none"> • Speaking and listening • Reading and writing • Observing body language
	2.1.2 Identify the difference between formal and informal communications	<p>Formal communication:</p> <ul style="list-style-type: none"> • The customer's title and family name are used • The terminology and language used are business orientated • There is little or no social discussion <p>Informal communication:</p> <ul style="list-style-type: none"> • The customer's first name is used • Titles are not used • Social discussion occurs

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.1.3 Recognize barriers to effective communication	<p>Common examples of barriers to effective communication include:</p> <ul style="list-style-type: none"> • Pace and rate of speech that is too fast • Previous experience with the service desk or customer • Mismatch of expectations • Mismatch of technical expertise • Unconscious bias • Language, dialect, and accent • Asking the wrong questions • Using inappropriate terminology • Background noise • Stress • Poor technology • Inappropriate choice of channel • Inappropriate timing
2.2 Verbal and Non-Verbal Communication Skills	2.2.1 Explain the principles of good verbal skills	<p>Principles of good verbal skills include:</p> <ul style="list-style-type: none"> • Speaking clearly and concisely • Adapting to the customer's communication style to aid understanding • Minimizing ambiguity • Being professional and use humor appropriately • Avoiding the use of slang • Avoiding verbal tics • Expressing appropriate empathy

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.2.2 Explain the principles of good non-verbal communication skills	Principles of good non-verbal communication skills include: <ul style="list-style-type: none"> • Understanding the impact of body language - e.g. Eye contact, facial expressions, gestures, posture and body orientation, space, and distance • Understanding the impact of tone of voice and silence • Understanding the impact of symbols and emojis
2.3 Listening Skills	2.3.1 Describe the principles of active listening	The principles of active listening include: <ul style="list-style-type: none"> • Being emotionally and physically prepared to listen to and focus on the speaker • Minimizing distractions • Avoiding the temptation to interrupt • Pausing before replying • Taking notes and making reference to them • Using verbal attends • Understanding the real feelings or intentions behind what is said • Paraphrasing for clarification • Repeating for verification
	2.3.2 Describe paraphrasing and its importance	Paraphrasing means to re-state what the customer said in your own words. Paraphrasing is important because it: <ul style="list-style-type: none"> • Shows the customer that they are being listened to and understood • Gives the customer the opportunity to agree or disagree with the analyst's understanding

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.3.3 Explain the benefits of active listening	<p>The benefits of active listening include:</p> <ul style="list-style-type: none"> • Improved ability of the analyst to identify and address a customer's emotional state • More effective analysis of customer needs • Improved customer experience • Establishing credibility for the analyst and the service desk • Optimized call time • Reduced stress for analysts and customers • Reduced resolution time • Increased accuracy
	2.3.4 Recognize barriers to listening and understanding	<p>Barriers to listening and understanding include:</p> <ul style="list-style-type: none"> • Speed of thinking • Outside distractions • Personal listening habits • Rationalizing • Omission • Transformation of detail - e.g. Changing the order of events

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.4 Written Communications Skills	2.4.1 Recognize why using correct grammar and spelling is important in written communications and documentation	<p>Using correct grammar and spelling is important because it:</p> <ul style="list-style-type: none"> • Reflects well on the organization and the analyst • Allows data to be reused by knowledge management without extensive editing • Demonstrates professionalism • Reduces confusion, misunderstanding and misinterpretation • Provides clarity for issues being passed to other support teams • Improves understanding for the reader
	2.4.2 Identify the elements required for writing professional business communications and documentation	<p>To write effective business communications and documentation:</p> <ul style="list-style-type: none"> • Use business style language • Write clearly and concisely • Use grammar correctly • Use punctuation correctly • Take the time to proof-read your communication • Pay careful attention to the email distribution list • Avoid using email for any difficult, sensitive, or confrontational issues • Be mindful of the appropriate use of acronyms, capitalization, emojis, and symbols • Avoid using slang • Keep references about other people or organizations appropriate

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.5 Questioning Skills	2.5.1 Explain the difference between open and closed questioning	<p>The difference between open and closed questions:</p> <p>Open questions:</p> <ul style="list-style-type: none"> • Invite description and elaboration • Are intended to draw more information from customers <p>Closed questions:</p> <ul style="list-style-type: none"> • Seek 'yes', 'no', or short responses • Focus the customer and limit the response • Are intended to obtain specific information • Confirm the facts
	2.5.2 Explain the structured questioning technique	<p>Structured questioning means to:</p> <ul style="list-style-type: none"> • Use prescriptive questions in a certain order to ensure accurate arrival at a specific outcome • Follow a sequenced string of questions with decision points, to rapidly identify the issue the customer is experiencing

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.6 Problem Solving	2.6.1 Explain the skills required for effective problem solving	<p>The skills required for effective problem solving include:</p> <ul style="list-style-type: none"> • Creative thinking • Inductive reasoning • Deductive reasoning • Critical thinking • Effective communication to understand the issue and verify the facts • Effective identification and use of knowledge • Appropriate use of procedures - e.g. escalation • Effective decision making
	2.6.2 List the steps in a typical problem-solving technique	<p>The following steps are used in problem-solving:</p> <ul style="list-style-type: none"> • Understand what is happening to identify the problem • Gather and document relevant information • Identify the possible causes • Test the most probable or simplest cause • Develop a plan and implement a solution • Observe and evaluate the results of the plan • Document in detail how the problem was analyzed and solved
2.7 Rapport Techniques	2.7.1 Describe emotional intelligence	<p>Emotional intelligence is the ability to recognize one's own feelings and the feelings of others and to use this skill to guide thinking and behaviors in order to make good judgements, take appropriate actions and achieve effective outcomes.</p>

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.7.2 Identify the components of emotional intelligence	<p>The components of emotional intelligence include:</p> <p>Self-awareness:</p> <ul style="list-style-type: none"> Recognizing personal feelings and how they affect behavior <p>Self-management:</p> <ul style="list-style-type: none"> Managing personal emotions to consciously choose the most appropriate behavior to achieve a positive outcome <p>Motivation:</p> <ul style="list-style-type: none"> An internal desire to achieve a positive outcome <p>Empathy:</p> <ul style="list-style-type: none"> Recognizing, acknowledging, and adapting to the emotions of others to influence their behavior
	2.7.3 Summarize the benefits of emotional intelligence	<p>The benefits of good emotional intelligence include:</p> <ul style="list-style-type: none"> Analysts feel able to manage and influence the customer interaction Reassures customers that their feelings are recognized and understood Develops rapport with customers Reduces the potential for conflict Increases the likelihood of eliciting the right information from customers

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.7.4 Recognize common customer emotions or actions that an analyst needs to manage	<p>Common emotions or actions that an analyst might have to manage include:</p> <ul style="list-style-type: none"> • Frustration • Anger • Defensiveness • Judgmental attitude about IT and the service desk • Irritation • Impatience • Fear • Embarrassment • Arrogance
	2.7.5 Describe methods for acknowledging the customer's emotions	<p>To acknowledge a customer's emotions:</p> <ul style="list-style-type: none"> • Actively listen • Remain calm and in control • Advise them that this type of issue is familiar • Allow them to completely share their issue • Apologize for the inconvenience • Offer options and give them control where appropriate • Let them know that others have experienced this type of issue

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.7.6 Explain techniques for dealing with negative reactions from customers	Techniques for dealing with negative reactions from customers include: <ul style="list-style-type: none"> • Maintaining a consistent and professional approach • Understanding why the reaction is negative • Adapting the communication style appropriately • Avoiding the use of emotional or judgmental language • Aiming to reduce emotional levels
2.8 Conflict and Negotiation Skills	2.8.1 Describe the signs that conflict is developing	Signs that conflict is developing include: <ul style="list-style-type: none"> • A change in the customer's tone of voice, rate of speech, volume, or communication style • The customer becoming withdrawn and gives little or no feedback • The use of words showing emotion
	2.8.2 Identify appropriate actions to reduce and eliminate conflict	Actions to reduce and eliminate conflict include: <ul style="list-style-type: none"> • Actively listening • Letting the customer vent their emotion appropriately • Finding an appropriate point at which to respond • Displaying appropriate empathy • Finding a resolution or explaining the next step • Remaining positive • Setting and managing the customer's expectations

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.8.3 Describe negotiation	Negotiation is a process by which compromise, or agreement is reached while avoiding argument or dispute.
	2.8.4 Describe the elements of negotiation	<p>The elements of negotiation include:</p> <ul style="list-style-type: none"> • Understanding the supported services and needs of the customer • Active listening • Maintaining emotional control • Communicating effectively • Establishing trust • Identifying options and seeking mutual agreement • Setting objective criteria to measure results
2.9 Interaction Management Skills	2.9.1 Explain the benefits of professionally managing interactions	<p>The key benefits of professionally managing interactions include:</p> <ul style="list-style-type: none"> • Issues are resolved efficiently • Interaction time is optimized • Service desk credibility is established and maintained • Customers are kept informed and engaged • The confidence of the analyst improves • Customer confidence in the analyst improves • Customer expectations are managed • A repeatable service is created • The level of customer satisfaction increases

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.9.2 Explain the benefits of using a standard greeting	<p>The benefits of using a standard greeting include:</p> <ul style="list-style-type: none"> • Customers immediately knowing that they have contacted the correct area • Demonstrating a willingness to help the customer • Enhancing the image of the service desk • Establishing an atmosphere of trust and respect • Setting the customer's expectations for the call • Putting the analyst in control of the call • Consistency across the service desk
	2.9.3 Describe actions for managing and redirecting issues related to unsupported items	<p>To manage and redirect issues related to unsupported items:</p> <ul style="list-style-type: none"> • Maintain a positive service attitude • Be polite and helpful • Explain which services are offered and/or supported • Provide alternatives for resolving the issue within the constraints of business guidelines • Know where to route the issue

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.9.4 Explain the behaviors and situations to avoid when interacting with customers	The behaviors and situations to avoid when interacting with customers include: <ul style="list-style-type: none"> • Asking for information that has already been provided • Not focusing on the customer • Background noise • Extended wait times • Multiple transfers • Being drawn into an argument
	2.9.5 Explain how to manage an abusive customer	When dealing with an abusive customer: <ul style="list-style-type: none"> • Maintain your professionalism • Politely advise that you will terminate or transfer the call if the abuse persists • Inform your manager of the abuse • Refer to the organization's procedures that reference this type of situation
	2.9.6 Explain how to manage an angry customer	When dealing with an angry customer: <ul style="list-style-type: none"> • Do not interrupt them • Let them vent • Show empathy if appropriate • Recognize that their anger is not personal • Be respectful • Offer assistance • Remain positive

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.9.7 Explain how to manage an inconvenienced customer	When dealing with an inconvenienced customer: <ul style="list-style-type: none"> • Listen and do not make excuses • Apologize for any poor service if appropriate • Take ownership and honor your commitments • Take action to resolve the issue
	2.9.8 Explain how to manage an overtalkative customer	When dealing with an over talkative customer: <ul style="list-style-type: none"> • Wait a reasonable time for them to finish, then use a contrived interrupt • Acknowledge them and the information provided • Take control of the conversation • Use their name to gain their attention • Ask closed questions to gain the required information
	2.9.9 Explain how to manage an emotionally distressed customer	When dealing with an emotionally distressed customer: <ul style="list-style-type: none"> • Use their name • Empathize with them • Encourage them to focus on the issue not the emotion

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.9.10 Explain how to manage a customer that is reluctant to end an interaction	To manage a customer that is reluctant to end an interaction: <ul style="list-style-type: none"> • Recognize that they are prolonging contact • Reassure them • Use their name • Ask closed questions • Clearly summarize how the issue occurred and include the steps taken by both the analyst and the customer to reduce future impact • Thank them for their time
	2.9.11 Describe how to professionally disengage from a support interaction	To professionally disengage from a support interaction: <ul style="list-style-type: none"> • Use the customer's name • Ask closed questions to lead the customer to closure • Set the customer's expectation for any follow-up • Ask if the customer has any other questions • Thank the customer for calling • Say goodbye and mean it • Allow the customer to end the interaction
2.10 Resilience	2.10.1 Describe the importance of emotional resilience	Emotional resilience is used to describe the ability of a person to adapt to stressful situations or a crisis. Resilient people tend to be able to take things in their stride and adapt to adversity without any long-term impact to them. People that are less resilient have a more difficult time with stress and crisis, sometimes resulting in lasting difficulties.

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.10.2 List some common causes of stress	<p>Some common causes of stress:</p> <p>Positive:</p> <ul style="list-style-type: none"> • Promotion at work • Learning a new skill • Starting a new job • Personal life situations • Change <p>Negative:</p> <ul style="list-style-type: none"> • Too much work for available resources • Not enough time or ineffective use of time • Lack of skills, knowledge, or appropriate training • Ineffective management • Money • No self-confidence • Insufficient rest
	2.10.3 Describe some of the signs of positive stress	<p>Some common signs of positive stress include:</p> <ul style="list-style-type: none"> • Smiling faces • Friendly chat • Enthusiasm • Helpful attitude • Energetic

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.10.4 Describe some of the signs of negative stress	<p>Some common signs of negative stress include:</p> <ul style="list-style-type: none"> • Increased respiration and perspiration • Redness of face • Anxious behavior • Changes in appearance • Vulnerability to illness • Inability to concentrate • Over reaction • Mood swings • Short tempered or irritable • Extremely negative or sarcastic and cynical attitude
	2.10.5 Describe the responsibility we have to manage stress for ourselves and our colleagues	<p>To manage stress for ourselves and our colleagues we have a responsibility to:</p> <ul style="list-style-type: none"> • Recognize situations that might cause stress • Offer support to colleagues who show signs of stress • Take proactive and positive actions to reduce stress for ourselves and colleagues • Alert management about anyone showing signs of stress • Raise concerns about your own stress levels

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.10.6 List actions that reduce stress	<p>Some actions that may help to reduce stress include:</p> <ul style="list-style-type: none"> • Recognizing signs of stress in yourself and others • Prioritizing goals and set realistic expectations • Managing your time effectively • Talking about how you are feeling and your concerns • Using breathing techniques • Maintaining a healthy work-life balance • Visiting a Doctor if symptoms continue or affect your well-being • Taking annual leave • Participating in physical exercise
2.11 Time Management	2.11.1 Explain what multitasking means in a support environment	<p>Multi-tasking in a support environment includes having the ability to:</p> <ul style="list-style-type: none"> • Switch tasks frequently • Handle frequent changes • Prioritize multiple tasks throughout the day with minimal supervision • The ability to handle multiple issues, potentially at different stages of their life cycle • Organize work effectively

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.11.2 List techniques to improve time management	<p>Techniques to improve time management include:</p> <ul style="list-style-type: none"> Identifying and action the most important items first in accordance with defined priorities Prioritizing everyday tasks to ensure that you are spending your time on the right tasks Continually reviewing and revising routine tasks to improve efficiency Accurately estimating and planning how long non-routine tasks take Avoiding the 'read and defer' cycle Using a time management tool Documenting all personal and business tasks in detail Using hierarchical escalation when there is a priority conflict that does not fall within a known procedure
	2.11.3 Describe the benefits of effective time management	<p>The benefits of effective time management include:</p> <ul style="list-style-type: none"> Creating and maintaining trust between colleagues and customers Reduced risk of stress Improved consistency and quality of work Reduced risk of distraction

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.12 Positive Approach and Attitude	2.12.1 Recognize the differences between assertive, aggressive, and passive behavior	<p>People who exhibit passive behavior:</p> <ul style="list-style-type: none"> Do not express their needs, opinions, or feelings Apologize when it is not their fault Do not respect their own rights Believe they do not have a right to ask for what they want Avoid conflict, even when it affects their comfort <p>People who exhibit aggressive behavior:</p> <ul style="list-style-type: none"> Only respect their own needs, opinions, or feelings Do not apologize, even when it is their fault Do not respect the rights of others Believe that others do not have the right to ask for what they want Avoid discomfort, even at the risk of conflict <p>People who exhibit assertive behavior:</p> <ul style="list-style-type: none"> Respect their own and other people's needs, opinions, and feelings Apologize when at fault, but also allow others to take responsibility for their own actions Respect their own rights and the rights of others Feel comfortable asking for what they need or want Deal with conflict in a mature way

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.12.2 Explain why demonstrating confidence is important	Demonstrating confidence: <ul style="list-style-type: none"> • Establishes credibility • Puts the customer at ease and lets them know they are in safe hands • Encourages customer loyalty • Enhances the reputation of the service desk • Increases customer satisfaction • Puts the analyst in control of the interaction • Improves the customer experience
	2.12.3 Recognize how confidence is demonstrated	To demonstrate confidence: <ul style="list-style-type: none"> • Speak with assurance and without hesitation • Speak using a positive tone of voice • Use positive language • Smile and exhibit good posture • Use available resources • Admit what you do not know • Take ownership of the issue

2. Analyst Skills		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.13 Professional Development	2.13.1 Identify methods for enhancing personal professional development	<p>Methods for enhancing professional development include:</p> <ul style="list-style-type: none"> • Understanding personal strengths and weaknesses • Seeking feedback relating to performance from leadership and peers • Attending courses, seminars, and industry events • Networking with peers at courses, seminars, and industry events • Subscribing to industry related publications • Contributing to and sharing knowledge via blogs, white papers, and online social groups • Joining and participating in industry related groups

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.1 Practices, Processes and Procedures	3.1.1 Explain what is meant by a practice, a process, and a procedure	<p>Practice:</p> <ul style="list-style-type: none"> A set of organizational resources designed for accomplishing an objective <p>Process:</p> <ul style="list-style-type: none"> A series of steps, actions and decisions involved in the way work is completed in order to achieve a consistent and sustainable outcome. <p>Procedure:</p> <ul style="list-style-type: none"> A procedure is the detailed description of the way each step, action or decision in the process is to be carried out
	3.1.2 Explain practice, process, and procedure management	<p>Practice, process, and procedure management:</p> <ul style="list-style-type: none"> Designs, implements, and maintains practices, processes and procedures that are sustainable, measurable and repeatable Plans and monitors the performance of practices, processes, and procedures Ensures that the appropriate components are available to execute practices, processes, and procedures effectively - e.g. information and technology, partners and suppliers, organizations and people

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.1.3 Explain the importance of documenting practices, processes, and procedures	<p>It is important to document practices, processes, and procedures in order to:</p> <ul style="list-style-type: none"> • Encourage the understanding and adherence to practices, processes, and procedures for consistency and sustainability • Assist with auditing • Assist with dispute resolution • Clearly define roles and responsibilities • Allow others to perform tasks when key people are not available • Assist the service desk with adapting to changes • Enable knowledge sharing • Assist with continual improvement initiatives
	3.1.4 Explain the importance of following processes and procedures	<p>It is important to follow documented processes and procedures in order to:</p> <ul style="list-style-type: none"> • Ensure consistent service delivery • Improve efficiency, effectiveness, and productivity • Enable new staff to become effective more quickly • Promote common understanding • Build the analyst's confidence in their ability to professionally manage interactions
3.2 Incident Management	3.2.1 Explain the purpose of incident management	<p>The purpose of incident management is to minimize the negative impact of incidents by restoring normal service operation as quickly as possible</p> <p>Source ITIL®</p>

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.2.2 Describe an incident	An incident is an unplanned interruption to a service or a reduction in the quality of a service. Source ITIL®
	3.2.3 Explain the objectives of incident management	The primary objectives of incident management are to: <ul style="list-style-type: none"> • Restore normal service operations as quickly as possible • Minimize the adverse impact on business operations • Ensure the best possible levels of service quality • Ensure the best possible levels of availability are maintained

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>3.2.4 List the principal activities that the Service Desk Analyst performs in incident management</p>	<p>The principal activities of incident management that Service Desk Analysts perform are:</p> <ul style="list-style-type: none"> • Identification • Record and document incidents • Categorization • Prioritization (impact and urgency) • Initial diagnosis • Incident matching • Investigation and diagnosis • Functional and hierarchic escalation • Collaborate with appropriate teams, sharing pertinent information and knowledge • Communicate status updates to customers • Resolution and recovery • Own and monitor incidents throughout their lifecycle • Close incidents appropriately • Notify problem management of potential problems • Track and report

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.2.5 Explain the benefits of effective incident management	<p>The benefits of the incident management include:</p> <ul style="list-style-type: none"> • Reduce the impact of incidents on the business • Improve staff utilization • Improve resolution times (reduces lost productivity) • Provide consistency to the categorization and prioritization of incidents • Provide a system wide view of incidents encountered • Manage an incident from beginning to end (its lifecycle) • Help to identify points of failure • Facilitate proactive communication • Help to prevent future incidents • Facilitate continual improvement • Assist in the provision of accurate management information • Assist in the identification of incident trends and workflows • Provides a source of data for proactive and reactive problem solving
	3.2.6 Identify common measures of success for incident management	<p>Common measures of success for incident management include:</p> <ul style="list-style-type: none"> • Increase in the percentage of incidents resolved at first contact • Increase in the percentage of incidents resolved within Service Level Agreements • Reduction in the average time to resolve incidents not resolved on first contact

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.3 Service Request Management	3.3.1 Explain the purpose of service request management	The purpose of service request management is to support the agreed quality of service by handling all pre-defined, user-initiated service requests in an effective and user-friendly manner
	3.3.2 Describe a service request	A service request is a formal request from a customer for information, advice, or a standard change or for access to an IT service, or to provide standard IT services for a new customer
	3.3.3 Explain the objectives of service request management	<p>The objectives of service request management are to:</p> <ul style="list-style-type: none"> • Provide a channel for customers to request and receive services • Offer standard services for which a pre-defined approval and qualification process exists • Provide information to customers about the availability of services and the procedure for obtaining them • Source and deliver the components of requested standard services - e.g. licenses and software media • Assist with general information, suggestions, complaints, or comments
	3.3.4 Identify common measures of success for service request management	<p>Common measures of success for service request management include:</p> <ul style="list-style-type: none"> • Increase in the percentage of service requests fulfilled at first contact • Increase in the percentage of service requests fulfilled within Service Level Agreements • Reduction in the average time to fulfill service requests not fulfilled on first contact

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.4 Incident and Service Request Recording	3.4.1 Identify the primary reasons for recording incidents and requests	<p>The primary reasons for recording incidents and requests are to:</p> <ul style="list-style-type: none"> • Create a unique reference number • Create an audit trail • Provide information for trend analysis • Provide information on categories and frequencies • Provide data to perform a root cause analysis • Provide data for other team members • Provide reusable content for the knowledge base • Help the service desk to create an information checklist or FAQ • Document the workload of the service desk • Influence on-going service and process improvement

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>3.4.2 List the procedure for, and information required, to raise an incident or service request</p>	<p>The procedure for, and information required to raise an incident or service request:</p> <ul style="list-style-type: none"> • Confirm and capture the customer’s name • Confirm the customer’s eligibility for or entitlement to service • Confirm and capture the customer’s contact information - e.g. phone number and e-mail address • Capture the service or component affected • Identify and capture the appropriate category • Identify and capture the priority of the incident based on impact and urgency • Confirm the description of the incident’s symptoms with the customer and record the facts and details • Identify and record any special requirements • Identify and record related incidents, problems or known errors • Escalate the incident or service request to the relevant support team or third party if necessary, inform the customer and update the record • Record the steps taken and any attempted and successful resolutions • Resolve the incident or service request, or set the customer’s expectations regarding the plan of action and next contact • Record the steps to be taken after the interaction, any commitments made and the next contact date • Provide the customer with a unique reference number

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>3.4.3 Explain how to determine the priority of an incident or service request</p>	<p>The priority of an incident or service request is determined by:</p> <ul style="list-style-type: none"> • The IT service affected and the business impact it is having on the organization • The urgency of the incident or service request (the speed with which the incident needs to be resolved or the service request fulfilled) • The number of people affected • The service desk’s ability to provide a workaround
	<p>3.4.4 List the steps required to resolve an incident or service request</p>	<p>To resolve an incident or service request:</p> <ul style="list-style-type: none"> • Ensure the customer is satisfied with the resolution provided • Summarize the resolution activity • Ask if the customer has any other questions • Thank the customer for contacting the service desk • Provide the customer with written confirmation that the incident is resolved, or service request is fulfilled and include details of the resolution if appropriate • Update the record with appropriate information • Resolve the incident or service request • Provide a customer satisfaction survey in accordance with the feedback procedure

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.5 Escalation	3.5.1 Explain the two types of escalation	<p>There are two types of escalation; functional and hierarchic:</p> <p>Functional escalation:</p> <ul style="list-style-type: none"> • Transferring an incident, service request, problem or change to a team with the required level of expertise to assist in the resolution <p>Hierarchic escalation:</p> <ul style="list-style-type: none"> • Informing or involving more senior levels of staff or management to assist in the resolution
	3.5.2 Identify some circumstances in which escalation is appropriate	<p>Functional escalation is appropriate when:</p> <ul style="list-style-type: none"> • The service desk is not equipped to resolve the issue • The support model indicates that this issue should be dealt with by another party • The time required to work on the issue is prohibitive to service desk support <p>Hierarchic escalation is appropriate when:</p> <ul style="list-style-type: none"> • Customers ask to speak to a supervisor or manager • An issue occurs that affects business revenue or reputation • No existing workaround is available, and the issue has a critical impact on the business • There is a breach of contractual obligations

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.6 Status Updates	3.6.1 Explain why status updates are important	<p>Keeping customers informed about status changes is important because:</p> <ul style="list-style-type: none"> • They feel important and valued • It demonstrates progress • Customer satisfaction is improved • It reduces inbound interactions • It helps to manage expectations and provides an opportunity to exceed them • Promotes the service desk as a single point of contact
	3.6.2 List the information to provide in a status update	<p>When providing customers with a status update:</p> <ul style="list-style-type: none"> • Include the reference number • Include the current status • Include the service desk contact details • Include the next steps or scheduled tasks • Include the timeframe and the date and time of the next status update • Include the agreed next contact time if appropriate
3.7 Problem Management	3.7.1 Explain the purpose of problem management	The purpose of problem management is to reduce the likelihood and impact of incidents by identifying actual and potential causes of incidents, managing workarounds, and known errors
	3.7.2 Describe a problem	A problem is a cause or potential cause of one or more incidents. The cause is not usually known at the time a problem record is created and problem management is responsible for further investigation

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.7.3 Explain what is meant by reactive and proactive problem management	<p>Reactive problem management:</p> <ul style="list-style-type: none"> Is concerned with solving problems in response to one or more incidents <p>Proactive problem management:</p> <ul style="list-style-type: none"> Is concerned with identifying problems that might otherwise be missed. It analyzes incident records and data to identify trends or significant problems
	3.7.4 Explain the objectives of problem management	<p>The objectives of problem management are:</p> <ul style="list-style-type: none"> Identify and analyze errors in order to minimize their negative impact on the services being provided Prevent the recurrence of incidents Minimize the impact of incidents that cannot be prevented Determine the root cause of incidents and initiate actions to improve or correct the situation
	3.7.5 Explain the service desk's responsibilities in problem management	<p>Although the service desk is not usually responsible for problem management, its responsibilities include:</p> <ul style="list-style-type: none"> Highlighting recurring incidents with no long-term fix to the appropriate team Ensuring incident information is accurately captured and recorded in to assist the appropriate team in diagnosing the underlying cause Work with technical teams to diagnose problems when appropriate Use known error records and knowledge articles to assist with the fast resolution of recurring or routine incidents until they can be prevented

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.7.6 Identify the three phases of problem management	The three phases of problem management are: <ul style="list-style-type: none"> • Problem Identification • Problem Control • Error Control
	3.7.7 List the primary activities of problem management	The activities in problem management include: <ul style="list-style-type: none"> • Detect • Record • Categorize • Prioritize • Assess risk • Investigate and diagnose • Move problems to known error status • Resolve • Raise a request for change • Closure • Major problem review
	3.7.8 Identify common measures of success for problem management	Common measures of success for problem management include: <ul style="list-style-type: none"> • Reduction in the number of incidents through effective problem management • Increase in the percentage of incidents resolved at first contact using workarounds identified by problem management • Reduction in average time to resolve incidents using workarounds identified by problem management

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.8 Change Enablement	3.8.1 Explain the purpose of change enablement	The purpose of change enablement is to maximize the number of successful IT changes by ensuring that risks have been properly assessed, authorizing changes to proceed, and managing a change schedule
	3.8.2 Describe a change	A change is the addition, modification, or removal of anything that could have a direct or indirect effect on services
	3.8.3 List the types of change	<p>The types of change are:</p> <p>Standard change:</p> <ul style="list-style-type: none"> • Pre-authorized minor change logged and tracked using a service request or request for change <p>Normal change:</p> <ul style="list-style-type: none"> • Follows the defined procedure in the change enablement process which includes going before the change advisory board (CAB) <p>Emergency change:</p> <ul style="list-style-type: none"> • The change enablement process will normally have a fast track procedure for handling emergency changes
	3.8.4 Explain the objectives of change enablement	<p>The objectives of change enablement are to ensure that:</p> <ul style="list-style-type: none"> • Standardized methods and procedures are used for efficient and prompt handling of all changes • All changes to service assets and configuration items are recorded in the configuration management system • Unplanned downtime is minimized

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.8.5 Explain the service desk's responsibilities in change enablement	<p>The service desk's responsibilities in change enablement are to:</p> <ul style="list-style-type: none"> • Record changes if requested • Participate in the change advisory board (CAB) • Participate in the assessment of risk as requested • Be aware of what changes are scheduled in order to identify if they might be the cause of incidents or problems • Appropriately escalate incidents that might be caused by changes • Communicate planned system downtime and interruptions to customers • Halt changes that will negatively impact service delivery
	3.8.6 List activities in change enablement	<p>Change enablement activities include:</p> <ul style="list-style-type: none"> • Recording • Acceptance and filtering • Classification • Assessment and evaluation • Business impact assessment • Approval • Building, testing and implementation • Planning and scheduling of changes • Authorization • Remediation planning (roll-back/back-out plan) • Post implementation review

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.8.7 Identify common measures of success for change enablement	Common measures of success for change enablement include: <ul style="list-style-type: none"> • Increase in the percentage of successful changes • Reduction in the percentage of incidents caused by changes • Reduction in the number of unplanned changes
3.9 Service Level Management	3.9.1 Explain the purpose of a service level management	The purpose of service level management is to set clear business-based targets for service performance, so that the delivery of a service can be properly assessed, monitored, and managed against these targets
	3.9.2 Explain the objectives of service level management	The objectives of service level management are to: <ul style="list-style-type: none"> • Establish a shared view of the services and target service levels with customers • Ensure the organization meets the defined service levels through the collection, analysis, storage and reporting of the relevant metrics for the identified services • Perform service reviews to ensure the current set of services continues to meet the needs of the organization and its customers • Capture and report on service issues including performance against defined service levels
	3.9.3 Describe a service level agreement	A service level agreement is an agreement between an IT service provider and a customer. It describes the IT service, documents service level targets, and specifies the responsibilities of the IT service provider and the customer. A single agreement may cover multiple IT services or multiple customers. It is not a legally binding document. <i>Source ITIL®</i>

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.9.4 Identify the typical content of a service level agreement that is relevant to the service desk (SLA)	<p>The typical content of an SLA that is relevant to the service desk includes:</p> <ul style="list-style-type: none"> • A description of the service • The service delivery model used • The types and quality of services provided • The level of service delivered (e.g. response time and hours of operation) • Maintenance schedules for IT services • Charging/costs for IT services • The methods used for measuring and reporting compliance with the agreement • The procedure for dealing with conflict between the customer and the service provider
3.10 Service Catalogue Management	3.10.1 Explain the purpose of service catalogue management	The purpose of service catalogue management is to provide a single source of consistent information on all services and service offerings, and to ensure that it is available to the relevant audience
	3.10.2 Describe a service catalogue	The service catalogue is a single source of consistent 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 different and levels of details to suit the audience
	3.10.3 Explain the objectives of service catalogue management	<p>The objectives of service catalogue management are to:</p> <ul style="list-style-type: none"> • Provide consistent information about agreed services • Ensure that the catalogue is produced and maintained • Ensure that the catalogue contains accurate information about status, interfaces, and other dependencies for all operational services and for those being prepared for

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
		operation
	3.10.4 List the basic components of an entry in the service catalogue	<p>The basic components in a service catalogue entry include:</p> <ul style="list-style-type: none"> • Service name • Service owner • Description of the service • Service Level Agreements and service deliverables in place • Customers entitled to the service • How to get support • Hours the service is available • Hours the service is supported • How to get the service if you do not already have it • IT support team ownership of the various service components • First-line, second line and third-line support responsibilities • Escalation points • Sources and links to relevant supporting documentation

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.11 Service Delivery Model	3.11.1 List some of the different types of sourcing methodologies and models available for delivering IT services	<p>Different types of sourcing methodologies and models include:</p> <p>Internally retained</p> <ul style="list-style-type: none"> • A service delivered by an internally retained IT organization <p>Insourced</p> <ul style="list-style-type: none"> • Re-establishing an internally resourced service following previous outsourcing • Increasing the scope of the internally resourced service desk <p>Outsourced</p> <ul style="list-style-type: none"> • A service delivered entirely by an externally contracted organization e.g. Managed Services Provider (MSP) <p>Co-sourced</p> <ul style="list-style-type: none"> • A joint venture between multiple service providers <p>Multi-sourced</p> <ul style="list-style-type: none"> • Any combination of sourcing options and models • SIAM (Service Integration and Management) • An approach for managing and integrating multisource and co-sourced services
3.12 Knowledge Management	3.12.1 Explain the purpose knowledge management	The purpose of knowledge management is to maintain and improve the effective, efficient, and convenient use of information and knowledge across the organization
	3.12.2 Explain the objective of knowledge management	<p>The objective of knowledge management is:</p> <ul style="list-style-type: none"> • To ensure stakeholders get the right information, in the proper format, at the right level, at the correct time, according to their access level and other relevant policies

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.12.3 Explain why knowledge management is important to the service desk	Knowledge management is important to the service desk because it: <ul style="list-style-type: none"> • Provides a framework for collaboration • Provides customer facing knowledge • Provides the service desk and wider IT with knowledge • Reduces training time for new service desk staff • Increases productivity • Develops rapport and establish credibility between the various teams supporting the customers • Provides the customer with convenient, correct, consistent and current information • Increases opportunities for first contact and first level resolutions • Lowers the overall cost of support
	3.12.4 Describe why it is important to maintain knowledge	Maintaining knowledge ensures that the service desk and its customers has timely access to relevant, up-to-date and appropriate information
	3.12.5 Identify common measures of success for knowledge management	Common measures of success for knowledge management include: <ul style="list-style-type: none"> • Increase in the number of incidents and requests resolved at first contact using knowledge articles • Reduction in the number of incidents or service requests requiring functional escalation • Reduction in the number of inbound interactions for simple queries

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.13 Information Security Management	3.13.1 Explain the purpose of information security management	The purpose of information security management is to protect the information needed by the organization to conduct its business
	3.13.2 Explain the objective of information security management	Information security management is responsible for ensuring that all of an organization's information and data is protected such as: <ul style="list-style-type: none"> • Personal information and data • Corporate information and data • Financial information and data • Intellectual properties • Access to facilities
	3.13.3 Recognize the importance of information security policies	It is important to have information security policies in place to: <ul style="list-style-type: none"> • Prevent, detect, and correct security incidents • Protect the organization and customers from unauthorized access • Protect data integrity • Protect corporate assets • Ensure compliance with legal requirements • Address security with third parties (suppliers) • Ensure staff are aware of their responsibilities regarding security • Ensure that information security management is designed into services, practices, processes, and procedures

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.13.4 Explain the service desk's responsibilities in information security management	<p>The service desk's responsibilities in information security management include:</p> <ul style="list-style-type: none"> • Confirming the identity of customers • Password resets • Unlocking accounts • Requests for access • Advising on the correct use of IT in relation to the IT security policy • Informing the relevant person(s) of any security breaches
	3.13.5 Recognize potential security threats to the organization that might occur through the service desk	<p>Potential security threats to the organization include:</p> <ul style="list-style-type: none"> • Phishing/spoofing • Social engineering • Malicious software • Bogus callers • Identity fraud • Manipulation • Unauthorized access • Fraudulent gathering of information

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.13.6 Identify types of security policies	Security policies include: <ul style="list-style-type: none"> • Password reset requirements • Compliance with international/regional regulatory and legislative requirements • Access rights to information • Physical access to facilities • Internet access • E-mail policies • Anti-virus • Firewall • Remote access • Data leakage mitigation • Clear desk policy • Mobile device security
	3.13.7 Explain the importance of reporting security compromises	Reporting security compromises: <ul style="list-style-type: none"> • Protects the organization and the customer • Identifies the offender • Alerts customers to possible security threats • Helps in the resolution of security incidents • Protects the organization's reputation

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.13.8 Explain the importance of legal compliance	<p>Legal compliance:</p> <ul style="list-style-type: none"> Protects identity information Protects the organization's assets Protects the organization from legal liability Includes notifying management about legal questions
	3.13.9 Explain the importance of software license management	<p>It is essential to maintain an inventory of all software licensed by the organization in order to:</p> <ul style="list-style-type: none"> Identify software that is over or under-licensed in order to manage costs by cancelling or reallocating unused licenses Avoid penalties for non-compliance of software licensing agreements
	3.13.10 Recognize the importance of confidentiality	<p>Confidentiality:</p> <ul style="list-style-type: none"> Protects the customer and organization from theft and/or information abuse Protects the customer's integrity Supports the organization's legal compliance requirements
3.14 Service Continuity Management	3.14.1 Explain the purpose and responsibility of the service continuity management	The purpose of service continuity management is to ensure that the availability and performance of a service is maintained at sufficient levels in case of a disaster. It is responsible for managing risks that could seriously impact service availability and performance.
	3.14.2 Explain the purpose of a service continuity plan	<p>The purpose of a service continuity plan is to:</p> <ul style="list-style-type: none"> Ensure that the service provider can always provide minimum agreed service levels Reduce risk to an acceptable level Plan for the recovery of services

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.14.3 List the key components of a service continuity plan	<p>The key components of a service continuity plan include:</p> <ul style="list-style-type: none"> • Identifying services that are most critical to the organization • How the service desk will maintain critical services to customers with minimal disruption to them • How to eliminate single points of failure • The provision for both short and long-term countermeasures to reduce the impact of disasters (these need to be tested on a regular basis) • What information and services customers need to have in place in order to access the services they require
3.15 Quality Assurance Program	3.15.1 Describe the purpose of a quality assurance (QA) program	The purpose of a quality assurance program is to develop and maintain appropriate improvements in the quality of services provided
	3.15.2 Explain the objectives of a quality assurance (QA) program	<p>The objectives of a quality assurance (QA) program is to:</p> <ul style="list-style-type: none"> • Document an 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

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.15.3 List common QA practices used by a service desk	<p>Common QA practices used by a service desk include:</p> <ul style="list-style-type: none"> • Interaction monitoring • Incident and service request monitoring • Key performance indicator monitoring • Knowledge monitoring • Customer satisfaction monitoring • Employee satisfaction monitoring
	3.15.4 Identify methods for monitoring calls and other interactions	<p>Methods for monitoring calls and other interactions include:</p> <ul style="list-style-type: none"> • Live service observations in which a reviewer sits with the analyst and listens in on the call or reviews the interaction • Remote service observations in which a reviewer monitors live interactions where the analyst is not aware that the interaction is being evaluated • Interaction recording and evaluation • Follow-up calls • Customer satisfaction surveys • Software designed to evaluate interactions in an automated environment • Voice analytic software
	3.15.5 Describe what is meant by incident and service request monitoring	<p>Incident and service request monitoring is a formal review of the incident and service request data recorded in the service management system in order to ascertain whether the relevant information has been collected and documented and acted on, and if appropriate, in accordance with the service level agreement (SLA) or service targets.</p>

3. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.15.6 Identify methods for monitoring incidents and service requests	Examples of methods for monitoring incidents and service requests include: <ul style="list-style-type: none"> • Regular reviews of the service management system logs • Regular reviews of the audit trails of all communication channels used
	3.15.7 List the benefits of interaction, incident, and service request monitoring	Incidents and service requests are monitored in order to: <ul style="list-style-type: none"> • Ensure that the documented incident or service request processes and procedures are followed • Validate the information provided to the customer • Provide feedback to analysts about job performance • Provide a coaching opportunity by identifying strengths and weaknesses of individuals • Identify areas where practices, processes or service delivery issues are not meeting expectations or where they are not being followed up • Identify areas where analysts might need training • Provide an opportunity to identify areas for improvement • Assist the service desk to be proactive • Improve service quality
3.16 Managing Customer Feedback	3.16.1 Describe the purpose managing customer feedback	The purpose of managing customer feedback is to determine customer perception of the products and services that service desk deliver, and to determine whether they are meeting customer expectations.

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.16.2 Explain the objectives of managing customer feedback	<p>The objectives are:</p> <ul style="list-style-type: none"> • Identify what customers value and feel is important • Identify areas for improvement • Benchmark and trend customer experience data • Assist in developing new products and services based on customer needs
	3.16.3 Identify some common sources of customer feedback	<p>Some common sources of customer feedback include:</p> <ul style="list-style-type: none"> • Comments on incidents and service requests • Customer initiated escalations • Customer satisfaction surveys • Compliments, complaints, and suggestions • Business relationship management (BRM) activities
	3.16.4 List the key components of managing customer feedback	<p>The key components of managing customer feedback include:</p> <ul style="list-style-type: none"> • Capturing customer feedback • Analyzing customer feedback • Linking feedback to continual improvement initiatives

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>3.16.5 Describe the three most common types of surveys and the importance of each type</p>	<p>On-going (event) surveys:</p> <ul style="list-style-type: none"> • Are completed as soon as possible after an interaction is closed; are typically short and can be completed quickly • Measure the quality of a single interaction, incident or service request • Are used to trend customer satisfaction between annual surveys and measure the impact of changes in practices, processes, procedures, products or services • Might use the net promoter score customer loyalty metric - e.g. "How likely is it that you would recommend our company / product / service to a friend or colleague?" <p>Periodic surveys:</p> <ul style="list-style-type: none"> • Are planned and scheduled on a periodic basis • Are used to evaluate overall satisfaction levels with the service desk's products, service offerings and staff • Identify changes to practices, processes, procedures, products or services that customers feel would improve their relationship with the service desk and meet their needs better • Are based on the customer's perception of the service desk over the last year or period <p>One-time or one-off surveys:</p> <ul style="list-style-type: none"> • Are not scheduled at regular intervals • Are scheduled for a specific reason • Are appropriate for evaluating satisfaction levels with current or new products and service offerings • Are appropriate for identifying changes that customers feel are important

3. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.17 Service Desk Metrics and Statistics	3.17.1 Explain the reason for compiling service desk metrics	Metrics are standard measurements by which efficiency, performance, progress, or the quality of a plan, practice, process, service, or product can be assessed. When combined they can demonstrate the creation of value for the customer through the service desk, and identify where potential improvements can be implemented
	3.17.2 Identify common service desk metrics	Common metrics include: <ul style="list-style-type: none"> • Average time to respond to inbound enquiries • Abandon rate • First contact resolution rate • First level resolution • Average resolution time by priority • Average resolution time by category • Customer satisfaction statistics • Service desk knowledge usage • Customer facing knowledge usage • Employee satisfaction statistics

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
4.1 Support Methods	4.1.1 Identify methods used for delivering service and support	<p>Methods used for service and support delivery include:</p> <ul style="list-style-type: none"> • Telephone • Face to face • Remote control • Email • Collaboration tools • Self-service • Live chat • Chatbots • Virtual agent • Social media
	4.1.2 Describe the purpose of using IT service management systems in a service desk environment	The purpose of using IT service management systems is to provide consistent and integrated service operations and service delivery
	4.1.3 Explain the primary objectives of using IT service management tools	<p>The primary objectives of using IT service management tools in a service desk environment are to:</p> <ul style="list-style-type: none"> • Record, track and manage incidents, problems, and changes • Provide service performance reports and management information from a single tool • Integrate with other systems of support - e.g. event monitoring and/or asset management systems

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.1.4 Explain the benefits of remote support	Using remote support tools has the following benefits: <ul style="list-style-type: none"> • Customer's devices are visible to the analyst • It is time effective • Faster diagnosis and resolution of issues • Fewer issues are escalated, improving first contact resolution • Provides an opportunity to train customers to be self-sufficient • May offer a better customer experience, improving customer satisfaction
	4.1.5 Recognize common disadvantages of using remote support tools	Common disadvantages of remote support are: <ul style="list-style-type: none"> • Security considerations • Insufficient bandwidth • Silent time • Over dependence by customers and analysts, reducing skills over time • Customers might feel excluded unless they are kept verbally informed of the steps being taken during the remote support session
	4.1.6 Recognize the benefits of using live chat and collaboration tools	The benefits of using live chat and collaboration tools include: <ul style="list-style-type: none"> • Provides a real-time written channel of communication • Negates the effect of misunderstanding due to language barriers • Nurtures relationships with remote colleagues and customers • Provides an alternative digital dialogue

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.1.7 Recognize common risks of using live chat and collaboration tools	Common risks of using live chat and collaboration tools include: <ul style="list-style-type: none"> • Less personal • Silent time • Can lead to misunderstandings - e.g. lack of tone
	4.1.8 Describe Automatic Call Distribution (ACD)	ACD routes calls based on predefined processes and algorithms
	4.1.9 List common automatic call distribution (ACD) features	Common ACD features include: <ul style="list-style-type: none"> • Call distribution • Skills based routing • Availability routing • Call queuing • Advanced reporting
4.2 Self-Service	4.2.1 Describe self-service	Self-service provides customers with the facilities needed to manage their service desk interactions and to find answers to common issues (self-help)

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.2.2 Identify the benefits of self-service	<p>The benefits of using self-service as a service delivery method include:</p> <ul style="list-style-type: none"> • 24x7 availability, 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 customers with easy access to the support organization • Provides customer updates • Allows customers to check the status of their current incidents or service requests • May allow customers to resolve simple issues without the assistance of an analyst - e.g. password resets, adding printers, mapping drives • Support resources can focus on other issues
	4.2.3 Identify risks of self-service	<p>Risks of self-service include:</p> <ul style="list-style-type: none"> • Inaccurate, irrelevant, or out of date information • Increased cost of maintenance • Perceived loss of personalized service • Might take longer to resolve issues • Creates the perception of 24/7 support

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.2.4 List common examples of self-service	<p>Examples of self-service include:</p> <ul style="list-style-type: none"> • Self-logging and tracking portal • Password resets • Knowledge bases • Application web-based help systems • FAQs • Application repositories • Fact sheets • On-line training/tutorials
4.3 Automation	4.3.1 Describe automation	Automation is technology by which a process or procedure is performed with minimal human interaction
	4.3.2 List common examples of automation	<p>Common examples of automation include:</p> <ul style="list-style-type: none"> • Skills based routing • Self-healing • Machine learning • Automated testing and deployment • Event and alert monitoring and diagnostic tools

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.3.3 Identify the benefits of automation	<p>Key benefits of automation include:</p> <ul style="list-style-type: none"> • Reduced cost of support • Reduced need for reactive support • Improved utilization of IT staff • Increased productivity • Automated system recovery or workarounds • Improved availability of services • Reduced resolution time for some incidents • Seamless service provision
4.4 Artificial Intelligence (AI)	4.4.1 Describe AI	AI, in the context of IT Service Management, is a focus on the research, understanding, and development of systems that can perform functions, tasks and activities that would typically be completed by humans
	4.4.2 List common examples of AI	<p>Common examples of AI include:</p> <ul style="list-style-type: none"> • Natural language processing • Speech recognition • Robotic process automation • Virtual agents
	4.4.3 Identify the benefits of AI	<p>Key benefits of AI include:</p> <ul style="list-style-type: none"> • Supporting the optimization of working practices • Enhancing automation opportunities • Eliminating errors • Increasing productivity • Improving value

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.4.4 Identify the challenges of AI	<p>Common examples of the challenge's organisations may encounter with AI adoption include:</p> <ul style="list-style-type: none"> • Reskilling staff • The availability and integrity of data • The consistency and predictability of results and outcomes • Integration with existing ITSM tools
4.5 Social Media	4.5.1 Describe what is meant by social media	<p>Social media refers to websites and applications that enable users to create and share content quickly, efficiently and in real-time.</p> <p>Social media:</p> <ul style="list-style-type: none"> • Comprises primarily internet and mobile app-based tools • Transforms people from content consumers into content producers • Enables organizations to build stronger relationships with customers and markets
	4.5.2 Explain how to use social media tools effectively	<p>To use social media tools effectively in business:</p> <ul style="list-style-type: none"> • Recognize the difference between traditional media and social media • Follow the organization's strategy for engaging with its market • Build communities in order to share knowledge • Be an ambassador for the organization's brand • Be transparent • Analyze content



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