



# Service Desk Manager (SDM)

## Professional Standard

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SDI® Service Desk Manager Standard v8.0

# SDI® Service Desk Manager (SDM)

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# 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.

## Acknowledgements

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# SDI® Service Desk Manager (SDM) Professional Standard

## Introduction

This document contains the SDI Service Desk Manager (SDM) 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 Manager (SDM) exam is based on the Service Desk Manager (SDM) 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 Manager (SDM) 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 (SDM) Professional Standard. The exams are independently administered and proctored by PeopleCert.

## Qualification Objectives

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

- Develop and deliver service desk strategies to that fully underpin the organization's business strategy and objectives
- Demonstrate the key leadership and management competencies needed to be a successful Service Desk Manager
- Interface the service desk with other departments within IT, other processes and other standards to maximise the efficiency and effectiveness of IT
- Create, support and deliver service desk processes and services to deliver exceptional customer and value

## Name of the Qualification

SDI Service Desk Manager (SDM)

## Qualification Target Audience

The Service Desk Manager (SDM) Professional Standard qualification course is for existing and aspiring service desk managers and supervisors who wish to develop their understanding of service desk management practices and 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
- 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 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 practical knowledge of the Service Desk Manager (SDM) Professional Standard
- Have a strong desire to progress in the IT service and support industry

## Qualification Structure and Weighting

Concept	SDM Weighting %
Policy and Strategy	15%
Leadership and Management	15%
People Management	20%
Resources	15%
Practices, Processes and Procedures	20%
Management Information and Performance Results	15%
<b>Total:</b>	<b>100%</b>



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

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.1.3 Identify the requirements for a successful service desk	The requirements for a successful service desk include: <ul style="list-style-type: none"> <li>• Leadership</li> <li>• Consistency</li> <li>• Commitment to quality</li> <li>• Strategy</li> <li>• People management</li> <li>• Resources</li> <li>• Strategic Value</li> <li>• Policy, Processes and Procedures</li> <li>• Employee engagement</li> <li>• Customer experience</li> <li>• Performance results</li> </ul>
	1.1.4 Define what is meant by the leadership requirement	Direction and goals are set, and all staff are inspired to achieve them
	1.1.5 Define what is meant by the consistency requirement	Support services that meet the organization's business needs are delivered consistently
	1.1.6 Define what is meant by the commitment to quality requirement	Quality standards and improvement programs are in place
	1.1.7 Define what is meant by the strategy requirement	Strategic, tactical and operational plans are in place to ensure the service desk achieves its objectives
	1.1.8 Define what is meant by the people management requirement	Roles and responsibilities are clearly defined, staff are recruited and developed in line with organizational requirements

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.1.9 Define what is meant by the resources requirement	The service desk has access to the resources and tools necessary for the staff to achieve objectives
	1.1.10 Define what is meant by the strategic value requirement	It is acknowledged by stakeholders as contributing to organizational success
	1.1.11 Define what is meant by policy, processes and procedures requirement	Relevant policy, processes and procedures are in place and are regularly documented and reviewed
	1.1.12 Define what is meant by the employee engagement requirement	Staff are committed to the organization's purpose and are motivated to contribute to its success
	1.1.13 Define what is meant by the customer experience requirement	A customer experience management program is in place
	1.1.14 Define what is meant by the performance results requirement	Regular performance metrics are produced and measured against targets
1.2 Service Desk Best Practices	1.2.1 Explain the concepts of good practice and best practice	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. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.2.2 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"> <li>• SDI Global Best Practice Standard for Service Desk</li> <li>• ITIL® Framework</li> <li>• ISO/IEC 20001 – IT Service Management</li> <li>• ISO 9001 – Quality Management Systems</li> <li>• ISO/IEC 27001 – Information Security Management Systems</li> <li>• ISO 14000 – Environmental Management</li> <li>• ISO 22301 - Business Continuity Management</li> <li>• DevOps</li> <li>• SIAM</li> <li>• Agile</li> <li>• Lean</li> </ul>
	1.2.3 Explain the benefits of following best practice	<p>The benefits of following best practice include:</p> <ul style="list-style-type: none"> <li>• Greater consistency</li> <li>• Improved governance and accountability</li> <li>• Reduced business risk</li> <li>• Areas for improvement are identified</li> <li>• Improved efficiency</li> <li>• Costs are managed effectively</li> <li>• Improved employee morale</li> <li>• Improved customer experience</li> <li>• Commitment to quality is demonstrated</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
1.3 Global Service Desk Perspective	1.3.1 Recognize the additional challenges of managing a global service desk	<p>A global service desk perspective requires an awareness of:</p> <ul style="list-style-type: none"> <li>• Different time-zones</li> <li>• Language support</li> <li>• Cultural differences</li> <li>• Differences in working practices</li> <li>• Services alignment</li> <li>• Costs</li> <li>• Public holidays</li> <li>• Legal requirements and local governance</li> </ul>
1.4 Service Ethics	1.4.1 Explain the purpose of a code of conduct	<p>The purpose of a code of conduct is to:</p> <ul style="list-style-type: none"> <li>• Document expected behaviors to ensure that staff understand what the organization expects of them</li> <li>• Document the organization's standards of moral and ethical behavior</li> <li>• Serve as a source of clarity for employees where there are vague or questionable areas of behavior</li> <li>• Merge and align behavior with the organization's values</li> <li>• Reduce the risk of conflict</li> <li>• Define the benchmark for professional behavior</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.4.2 Recognize the benefits of working within a code of conduct	A code of conduct: <ul style="list-style-type: none"> <li>• Encourages professional behaviour</li> <li>• Instils values in order to improve the customer experience</li> <li>• Facilitates identification of potential risks to the organization by responding to areas of behavior that need addressing</li> </ul>
	1.4.3 Recognize the benefits of honoring commitments made to customers, team members, and the organization	Honoring commitments made to customers, team members, and the organization improves: <ul style="list-style-type: none"> <li>• The customer experience</li> <li>• Trust</li> <li>• Credibility</li> <li>• Employee morale</li> <li>• Accountability</li> </ul>
1.5 Corporate Social Responsibility	1.5.1 Explain how the service desk can actively demonstrate its commitment to the organization's corporate social responsibility policy	Areas where the service desk can actively demonstrate its commitment to a corporate social responsibility policy include: <ul style="list-style-type: none"> <li>• Complying with relevant environmental and recycling policies and legislation</li> <li>• Ensuring health and safety guidelines are followed</li> <li>• Participating in community and charitable projects</li> <li>• Safeguard mental health and emotional wellbeing</li> <li>• Follow the organization's flexible working practices</li> <li>• Incorporate diversity and inclusion</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
1.6 Strategic Development	1.6.1 Requirements for an effective service desk strategy	<p>In order to develop an effective service desk strategy, you need:</p> <ul style="list-style-type: none"> <li>• Well-defined service desk goals and objectives that support business and IT goals</li> <li>• Close relationships with a network of people within the organization, in the support industry, and in wider communities</li> <li>• Input from your team to generate ideas</li> <li>• An understanding of the current and future state</li> <li>• Awareness of corporate and IT strategic plans</li> <li>• Knowledge of industry best practice</li> </ul>
	1.6.2 Demonstrate commercial awareness	<p>Service desk managers need an understanding of:</p> <ul style="list-style-type: none"> <li>• Service deliverables and expectations</li> <li>• Contractual obligations</li> <li>• Governance and compliance</li> <li>• Financial management</li> <li>• Funding models</li> <li>• Marketplace</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.6.3 Describe the processes and techniques required to obtain senior board approval	Processes and techniques required to obtain senior board approval include: <ul style="list-style-type: none"> <li>• Perform a risk analysis</li> <li>• Develop a business case for the proposed option</li> <li>• Develop a resources and time plan for action</li> <li>• Canvass and develop ideas and options in advance with key stakeholders</li> <li>• Present the issues, options, recommendations for action and costs, and the benefits to the appropriate senior audience</li> </ul>
1.7 Vision, Mission and Critical Success Factors	1.7.1 Describe the purpose of a service desk vision statement	The purpose of a service desk vision statement is to provide a longer-term view of what the service desk wants to become, aligned to the organization's long-term objectives
	1.7.2 Explain the objectives of a service desk vision statement	The objectives of a service desk vision statement include to: <ul style="list-style-type: none"> <li>• Promote the image of the service desk</li> <li>• Ensure that all staff understand the vision and that they consistently work towards achieving it</li> <li>• Encourage staff to develop skills that support the vision</li> </ul>
	1.7.3 Describe the purpose of a service desk mission statement	The purpose of a service desk mission statement is to communicate its reason for being and how it serves its stakeholders



1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.7.4 Explain the objectives of a service desk mission statement	The objectives of a service desk mission statement are: <ul style="list-style-type: none"> <li>• Identify the main purpose and role of the service desk</li> <li>• Align support goals with the organization's goals</li> <li>• Inspire commitment and buy-in to the service desk</li> </ul>
	1.7.5 Describe the purpose of critical success factors	The purpose of critical success factors is to define the strategic elements necessary for an organization, project, or process to achieve its mission
	1.7.6 Explain the objectives of critical success factors	The objectives of critical success factors include to: <ul style="list-style-type: none"> <li>• Identify which results, if successful, would deliver on the service desk's mission</li> <li>• Enable the service desk to track and measure progress towards strategic goals</li> <li>• Provide a common reference point on what is important</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
1.8 Implementing Strategic Vision	1.8.1 Identify techniques for establishing effective relationships with other teams and groups in the IT organization	<p>Techniques for establishing effective relationships with other parts of the IT organization include:</p> <ul style="list-style-type: none"> <li>• Communicate the goals, projects, and objectives of the service desk</li> <li>• Focus on how to achieve the objectives</li> <li>• Identify steps necessary to deliver commitments</li> <li>• Focus on actions needed to meet the requirements for success</li> <li>• Create a business case for significant projects along with their critical success factors</li> <li>• Understand the roles and responsibilities that each team has in meeting IT service and business objectives</li> <li>• Educate yourself and your team on the roles and responsibilities of the other teams</li> <li>• Educate other teams on the roles and responsibilities of your team</li> <li>• Treat your colleagues in the IT organization as customers</li> <li>• Treat your service desk colleagues as you would like to be treated</li> <li>• Involve stakeholders and feedback the value of their contribution</li> <li>• Recognize the achievements of others</li> <li>• Schedule regular meetings between key service desk staff and key members of other teams</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.8.2 Identify how to use formal and informal networks to accomplish objectives	<p>To use formal and informal networks to accomplish objectives:</p> <ul style="list-style-type: none"> <li>• Ensure that actions, which are 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</li> <li>• Identify the key stakeholders and obtain their buy-in to your recommendations</li> <li>• Understand the power of informal leaders and obtain their buy-in to your recommendations</li> <li>• Provide reports to demonstrate stakeholder contributions</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.8.3 Describe how to build effective working relationships	<p>To build effective working relationships and establish your credibility:</p> <ul style="list-style-type: none"> <li>• Honor your commitments</li> <li>• Do not commit to unrealistic targets to gain favor</li> <li>• Ensure that your commitments are clearly understood</li> <li>• Continually strive to improve your team</li> <li>• Encourage mutual respect within and between teams</li> <li>• Let others know that you respect their opinions</li> <li>• Have open communications with team members</li> <li>• Recognize different agendas</li> <li>• Actively listen to others</li> <li>• Demonstrate empathy - make certain that you understand others' concerns and issues</li> <li>• Be accountable for your actions</li> <li>• Take ownership</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.8.4 Identify the responsibilities of the Service Desk and Support Manager when contributing to IT and business objectives	<p>When contributing to IT and business objectives, the responsibilities of the Service Desk and Support Manager include:</p> <ul style="list-style-type: none"> <li>• Advising senior management about issues, their status and any concerns about service desk matters</li> <li>• Providing suggestions on how to improve IT services</li> <li>• Ensuring that the service desk is represented on all design, transition and service improvement initiatives</li> <li>• Gathering information, analyze, and communicate results: <ul style="list-style-type: none"> <li>• To/from IT staff</li> <li>• To/from customers</li> </ul> </li> </ul> <p>Participating in the organization's initiatives and cross-functional teams</p> <p>Identifying initiatives that contribute to the success of the organization</p>
	1.8.5 Explain the value of conducting assessments	<p>Conducting an assessment is a necessary step in managing change and for continual improvement. It identifies the issues and opportunities to be used as the as the basis for change and development</p> <p>Key types of assessment methods are:</p> <ul style="list-style-type: none"> <li>• SWOT - Strengths, weaknesses, opportunities, threats</li> <li>• CSA - Current State Analysis</li> <li>• Gap analysis - identify areas that do not meet current or future expectations</li> <li>• Benchmarking</li> </ul> <p>Outputs from assessments would include:</p> <ul style="list-style-type: none"> <li>• Business case/cost benefit analysis</li> <li>• Changes programs and projects</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
1.9 Sourcing Models	1.9.1 Describe the various sourcing options available for delivering consistent quality service	<p>The various sourcing options available for delivering consistent quality service are:</p> <ul style="list-style-type: none"> <li>Internally resourced - a service delivered entirely by an internally retained IT organization</li> </ul> <p>Insourced:</p> <ul style="list-style-type: none"> <li>Re-establishing an internally resourced service following previous outsourcing</li> <li>Increasing the scope of the internally resourced service desk</li> </ul> <p>Outsourced:</p> <ul style="list-style-type: none"> <li>A service delivered entirely by an externally contracted organization - e.g. Managed Services Provider (MSP)</li> </ul> <p>Co-sourced:</p> <ul style="list-style-type: none"> <li>A joint venture between multiple service providers</li> </ul> <p>Multi-sourced:</p> <ul style="list-style-type: none"> <li>A combination of in-house IT and 3rd party suppliers</li> </ul> <p>SIAM (Service Integration and Management):</p> <ul style="list-style-type: none"> <li>An approach for managing and integrating multi-sourced and co-sourced services</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.9.2 Identify the various structure models the service desk uses for delivering service	<p>The various structure models the service desk uses for delivering service are:</p> <ul style="list-style-type: none"> <li>• Local</li> <li>• Centralized</li> <li>• Virtual</li> <li>• Follow-the-sun</li> <li>• Specialized (by channel or technology)</li> <li>• Working remotely</li> <li>• Blended - a mix of structure models</li> <li>• Single or multi-tiered</li> </ul>
	1.9.3 Describe the outsourcing models used in a service desk environment	<p>The outsourcing models used in a service desk environment include:</p> <p>Off-site:</p> <ul style="list-style-type: none"> <li>• 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 offshore location in close geographical proximity (nearshoring) or more geographically distant (far shoring)</li> </ul> <p>On-site:</p> <ul style="list-style-type: none"> <li>• When an organization contracts with another organization to provide support services on its own premises that it might otherwise have employed its own staff to provide</li> </ul>

	<p>1.9.4 List the issues to consider when insourcing and outsourcing</p>	<p>Issues to consider when insourcing and outsourcing include:</p> <ul style="list-style-type: none"> <li>• Stability of the service provider</li> <li>• Sustainability of the services provided</li> <li>• Capability to deliver required services</li> <li>• The transition process</li> <li>• Transfer of intellectual property and ownership</li> <li>• Knowledge transfer</li> <li>• Management of customer expectations and experience</li> <li>• Establish clear and measurable objectives</li> <li>• Financial considerations - the costs and benefits expected</li> <li>• Cost of implementation</li> <li>• Cost of ongoing management</li> <li>• Cost of integration</li> <li>• Productivity improvements</li> <li>• The service supply chain</li> <li>• Contractual requirements and obligations</li> <li>• Availability of relevant in-house commercial skills</li> <li>• Risk assessment and ownership of third-party relationship risk management</li> <li>• The cost of monitoring and managing the risks</li> <li>• Responsibility for the review and ongoing monitoring of individual relationships</li> <li>• Impact on internal resources</li> <li>• Impact on business as usual</li> <li>• Impact on staff morale</li> <li>• Legal requirements</li> </ul>
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1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
		<ul style="list-style-type: none"> <li>• Geographical location of data and its security</li> <li>• Sourcing fatigue caused by continued change</li> <li>• Diversity, inclusion and social responsibility policies</li> <li>• Exit strategy</li> <li>• Transfer of employees upon termination</li> </ul>
	1.9.5 Explain the benefits of outsourcing	<p>The benefits of outsourcing include:</p> <ul style="list-style-type: none"> <li>• Focuses management resources on core competencies and the quality of the services provided</li> <li>• Processes and procedures are defined and documented for inclusion in the contract</li> <li>• Eliminates day-to-day supervision costs of the outsourced team</li> <li>• Reduces capital expenditure and moves costs to operating expenses</li> <li>• Drives efficiencies</li> <li>• Optimizes resources</li> <li>• Facilitates improved staffing flexibility</li> <li>• Potentially delivers improved quality of customer service and engagement</li> <li>• Allows existing staff to focus on other initiatives</li> <li>• Enables new opportunities for existing staff</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.9.6 Explain the benefits of insourcing	<p>The benefits of insourcing include:</p> <ul style="list-style-type: none"> <li>• Operational business control</li> <li>• Transparency of operations and costs</li> <li>• Expands the remit of the service desk</li> <li>• Focus from committed and dedicated in-house staff for delivery</li> <li>• Potential for reduced levels of management</li> <li>• Potential for less contractual obligation when managing customer needs</li> <li>• Potential agility around supply chain, operations and development</li> <li>• Able to work outside the scope of contracted outsourced services</li> <li>• Closer alignment with the strategy, vision and mission of the organization</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.9.7 Explain the risks associated with insourcing and outsourcing that need to be considered	<p>The risks associated with outsourcing include:</p> <ul style="list-style-type: none"> <li>• Resources might be inadequate to oversee the outsourcing relationship, contractual compliance and change management</li> <li>• Reduction in the direct control of day-to-day operations, including out-sourced staff</li> <li>• Infrastructure efficiency might be impacted if costs are fixed</li> <li>• Profit/cost center expectations might impact service delivery staff</li> <li>• Informal contacts and sources of information might be lost</li> <li>• Without sufficient integration, contractual agreements might inhibit previously available flexibility</li> <li>• The organizations involved might use different, multiple service management and knowledge management systems without sufficient integration</li> <li>• Potential for higher cost and poorer service if the service supply chain is not adequately defined</li> <li>• Service consistency might suffer</li> <li>• Business vision and service desk mission and vision are difficult to align</li> <li>• Customer service and engagement might be affected due to communication issues or lack of advertising and promotion</li> <li>• The perception that inferior service quality is negatively impacting the customer experience and satisfaction</li> </ul>

	<p>1.9.8          Explain the service level management (SLM) considerations when outsourcing</p>	<p>The service level management considerations required to successfully negotiate a contract with an outsourcer include:</p> <ul style="list-style-type: none"> <li>• Define the business objectives to be achieved by the services provided</li> <li>• Describe the service deliverables in detail</li> <li>• Define the expected performance standards</li> <li>• Define an ongoing reporting mechanism to measure and monitor expected performance</li> <li>• Evaluate the value received from the relationship</li> <li>• Provide a mechanism for review and change to the service levels over the course of the contract</li> <li>• Retain the right to terminate the contract where performance standards fall consistently below an acceptable level</li> <li>• Regularly measure and monitor risk</li> <li>• Define and agree underpinning contracts (UCs) with external suppliers</li> <li>• Explicitly state the accountabilities, roles and responsibilities of both the service provider and the customer</li> <li>• Define and document related policies, processes and procedures</li> <li>• Define the interfaces between outsourcers, the customer and other partners</li> <li>• Define performance levels that support those in the SLA, for example, response times, resolve times, status updates</li> <li>• 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</li> <li>• Business continuity plans</li> <li>• Positive and negative service credits</li> </ul>
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1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.9.9 Describe multi-sourcing	Multi-sourcing means to identify the proper balance of outsourcing and other sourcing options to ensure financial and operational effectiveness covering: <ul style="list-style-type: none"> <li>• Facilities</li> <li>• Outsourced staff</li> <li>• Permanent staff</li> <li>• Contract staff</li> <li>• Temporary staff</li> </ul>
	1.9.10 Identify the benefits of multi-sourcing	The benefits of multi-sourcing include: <ul style="list-style-type: none"> <li>• Maintains operational control while enabling the utilization of effective external options</li> <li>• Provides an optimum mix of resources (outsourced, contract, temporary) that balances customer service and engagement quality with corporate Return on Investment (ROI)</li> <li>• Offers greater flexibility and control for the buying organization</li> </ul>
1.10 Financial Management	1.10.1 Describe the objectives of financial management	The objectives of financial management include: <ul style="list-style-type: none"> <li>• Identifying costs of services and service assets</li> <li>• Understanding the value of services</li> <li>• Developing pricing strategies for IT services</li> <li>• Producing cost vs benefit (ROI) analysis and reports</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.10.2 Describe the activities involved in financial management	<p>The activities involved in financial management are:</p> <p>Accounting</p> <ul style="list-style-type: none"> <li>• A set of processes that enables the organization to record the way its money is spent</li> </ul> <p>Budgeting</p> <ul style="list-style-type: none"> <li>• Predicting costs and controlling expenditure</li> </ul> <p>Charging (billing)</p> <ul style="list-style-type: none"> <li>• A set of processes required to bill customers for services supplied</li> </ul>
	1.10.3 Understanding cost types used in financial management	<p>The different types of cost used in financial management include:</p> <p>Capital versus operating costs</p> <ul style="list-style-type: none"> <li>• Capital costs as assets associated with long term use</li> <li>• Operating costs are day-to-day expenses that result from running services</li> </ul> <p>Fixed versus variable costs</p> <ul style="list-style-type: none"> <li>• Fixed costs are costs that do not vary - e.g. rent and taxes</li> <li>• Variable costs are costs that depend on usage or resources - e.g. office supplies, energy usage and licenses</li> </ul> <p>Direct versus indirect costs</p> <ul style="list-style-type: none"> <li>• Direct costs are costs related to a specific service - e.g. equipment or people dedicated to a specific service</li> <li>• Indirect costs are costs that cannot be easily or fairly attributed to the cost of a specific service - e.g. equipment or people shared between multiple services or locations</li> </ul>

1. Policy and Strategy		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	1.10.4 Describe Return on Investment (ROI)	<p>Return on investment and its calculation is typically defined by each individual organization. Commonly, return on investment can be summarized as:</p> <ul style="list-style-type: none"> <li>• A method to justify investments</li> <li>• A financial calculation used to establish the time it will take to recover the costs of the investment (payback period)</li> <li>• A measure of the value of the investment</li> <li>• An assessment of cost and benefits</li> </ul>

2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.1 Leadership and Management	2.1.1 Explain the difference between leadership and management skills	While management focuses on planning, organizing, staffing, directing and controlling; leadership focuses on direction setting, building relationships, inspiring, and motivating the team to achieve its goals.
	2.1.2 Characteristics of an effective manager	The characteristics of effective management include: <ul style="list-style-type: none"> <li>• The mission is successfully implemented</li> <li>• Tactical and strategic views are evident, and planning takes place</li> <li>• Work is performed correctly</li> <li>• People are encouraged to take on additional responsibility</li> <li>• Effective procedures are developed and implemented</li> <li>• The service desk and the organization's business are effectively promoted</li> </ul>



	<p>2.1.3 Characteristics of an effective leader</p>	<p>Good leaders:</p> <ul style="list-style-type: none"> <li>• Recognize the difference between leadership and management</li> <li>• Define and communicate the vision and strategic direction to staff</li> <li>• Create an environment in which staff feel confident to make decisions and take ownership</li> <li>• Lead by example</li> <li>• Delegate effectively</li> <li>• Display trust</li> <li>• Share information appropriately</li> <li>• Maintain a positive perspective</li> <li>• Inspire service desk staff to undertake activities to achieve success</li> <li>• Motivate and mentor</li> <li>• Encourage participation</li> <li>• Discourage one person from dominating the team</li> <li>• Provide effective incentives</li> <li>• Encourage creativity and initiative in others</li> <li>• Practice and encourage fairness</li> <li>• Make decisions, even when they might be unpopular</li> <li>• Execute plans successfully</li> <li>• Demand more from themselves than from others</li> <li>• Practice and encourage continual personal development</li> <li>• Assess and work with differing needs and abilities of their staff</li> <li>• Demonstrate effective, clear and concise communication skills</li> </ul>
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**2. Leadership and Management**

Topic	Competency	Range of knowledge and understanding (not exhaustive)
<p>2.2 The role of the Service Desk Manager</p>	<p>2.2.1 Demonstrate the skills required to be an effective Service Desk Manager</p>	<p>The skills required to be an effective Service Desk Manager include:</p> <ul style="list-style-type: none"> <li>• People-management and team building</li> <li>• Strategic planning (direction-setting)</li> <li>• Tactical planning (short term activities)</li> <li>• Operational planning (business as usual)</li> <li>• The ability to lead and inspire</li> <li>• The ability to research, evaluate and apply relevant industry knowledge</li> <li>• Communication</li> <li>• Negotiating and influencing</li> <li>• Marketing</li> <li>• Critical thinking and problem solving to drive continual improvement</li> <li>• Coaching and mentoring</li> <li>• Prioritization</li> <li>• Conflict management</li> </ul>

2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.2.2 Describe the responsibilities of a Service Desk Manager	<p>The Service Desk Manager's responsibilities include:</p> <ul style="list-style-type: none"> <li>• Defining and implementing service desk strategy that supports the organization's business strategy</li> <li>• Promoting the service desk</li> <li>• Staff wellbeing, development, and training</li> <li>• Service reporting and operational performance reviews</li> <li>• Ensuring that processes and procedures used by the service desk are documented, regularly reviewed, and followed</li> <li>• Representing the service desk at a strategic level</li> <li>• Managing relationships</li> <li>• Understanding and influencing costs associated with running a service desk</li> <li>• Achieving delivery targets for customer service and support performance</li> </ul>

2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.3 Promoting the Service Desk	2.3.1 Identify the objectives of promoting the service desk	<p>The objectives of promoting the service desk include to:</p> <ul style="list-style-type: none"> <li>• Raise awareness of the service desk's contribution (value) in meeting business goals to customers and the organization</li> <li>• Improve the service desk's strategic position and business influence</li> <li>• Communicate the mission</li> <li>• Communicate the available IT services</li> <li>• Manage customer expectations</li> <li>• Increase the visibility of the service desk</li> <li>• Manage the customer experience</li> <li>• Increase customer loyalty</li> <li>• Clarify customer responsibilities and benefits</li> <li>• Improve the perception of the service desk's credibility and professionalism</li> <li>• Improve morale</li> </ul>

	<p>2.3.2 Give examples of channels available for promoting the service desk</p>	<p>Examples of channels available for promoting the service desk include:</p> <ul style="list-style-type: none"> <li>• IT services scorecard/dashboard that identify the service desk's performance</li> <li>• 'Lunch and Learn' sessions</li> <li>• Shadowing</li> <li>• Spending time in different areas of the business</li> <li>• Social media</li> <li>• Social collaboration tools</li> <li>• Communication groups - e.g. Yammer / SharePoint</li> <li>• Meet with customers one-on-one and ask them what they need</li> <li>• Set up a kiosk at organization/customer meetings in key areas like the cafeteria</li> <li>• Distribute flyers containing service desk information and FAQs</li> <li>• Promote the service desk via your organization's and/or service desk's intranet</li> <li>• Hold an 'Open House' - let your customers meet the people who solve their incidents and service requests</li> <li>• Organize 'Road Shows' - go to your customers</li> <li>• Schedule times for service desk staff to walk the floor in key customer areas</li> <li>• Induction sessions for new starters</li> <li>• Demonstrate to business areas how to use new services</li> <li>• Enter for industry awards</li> <li>• Video the desk in action and use in promotion programs</li> </ul>
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2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.3.3 Identify key activities to be undertaken when planning a promotion program	<p>The key activities to be undertaken when planning a successful promotion program include:</p> <ul style="list-style-type: none"> <li>• Clearly define the objectives and messages to be communicated</li> <li>• Identify the target audience and communicate using the appropriate channel</li> <li>• Consider budget and resource requirements</li> <li>• Consider whether there are multiple, specific, targeted communications or one communication for all audiences</li> <li>• Obtain feedback to verify that the message was delivered and understood</li> <li>• Understand the communications requirements within the organization</li> <li>• Plan appropriately for regularly scheduled and ongoing communication</li> </ul>
	2.3.4 Explain how to manage stakeholder expectations	<p>To manage stakeholder expectations:</p> <ul style="list-style-type: none"> <li>• Evaluate current levels of performance and soliciting feedback</li> <li>• Contribute to, use and promote the service catalogue</li> <li>• Define service levels that balance resources and capability with business requirements</li> <li>• Offer multiple channels to provide information about the service desk</li> <li>• Survey customers frequently to understand and respond to their needs</li> <li>• Link service desk KPIs with the organization's business objectives and KPIs</li> </ul>

2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.4 Organizational Knowledge	2.4.1 Explain strategic awareness of the organization	<p>Strategic awareness means to:</p> <ul style="list-style-type: none"> <li>• Be able to articulate the strategic goals, objectives and key business processes of the organization being supported</li> <li>• Know how and where to acquire knowledge of the organization's strategic plans</li> <li>• Interpret the intention of the strategic plans of the organization and apply them to the service desk</li> <li>• Know how IT services contribute to meeting the organization's goals</li> </ul>
	2.4.2 Recognize opportunities for greater participation in strategic decisions	<p>Opportunities for greater participation in strategic decisions include:</p> <ul style="list-style-type: none"> <li>• Take a proactive approach to developing and supporting strategic initiatives</li> <li>• Participate in management decision making</li> <li>• Demonstrate business vision, insight, and judgement</li> <li>• Support opportunities for growth</li> </ul>
2.5 Organizational Change Management	2.5.1 Describe the purpose of organizational change management	<p>The purpose of organizational change management is to adapt to changes in the organization's structure and direction in a coordinated and project-based manner. It comprises practices, processes, and procedures designed to manage change effectively, with minimized risk and interruption to customers and services</p>

## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.5.2 Identify different types of changes	Changes could include: <ul style="list-style-type: none"> <li>• Introduction or withdrawal of services</li> <li>• Mergers and acquisitions</li> <li>• Changes to structure and roles</li> <li>• Increased volumes of work</li> <li>• Cost cutting and operational rationalization</li> <li>• Changes to working practices</li> <li>• Implementation of new innovations and initiatives</li> </ul>
	2.5.3 Identify the benefits of using an organizational change management process	The benefits of using an organizational change management process include: <ul style="list-style-type: none"> <li>• Improves the organization's performance</li> <li>• Manages risk</li> <li>• Involves stakeholders in developing plans and gains their buy-in to new plans</li> <li>• Reduces the adverse impact of changes</li> <li>• Assists with planning and optimizing resources</li> </ul>



## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.5.4 Identify key elements of organizational change management	Key elements of organizational change management include: <ul style="list-style-type: none"><li>• Awareness and issue clarification</li><li>• Business case development and planning</li><li>• Operational planning</li><li>• Structured communications - e.g. using RACI (Responsible, Accountable, Consulted, Informed)</li><li>• Project management and governance</li><li>• Implementation and review</li><li>• Ensuring employee fairness and consistency</li><li>• Complying with legal, financial and human resource requirements</li><li>• Protecting and promoting industrial relations</li></ul>

2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.6 Project Management	2.6.1 List the elements required for successful project management	<p>The elements required for successful project management include:</p> <ul style="list-style-type: none"> <li>• Identifying the appropriate approach or methodology</li> <li>• Developing a business case as required</li> <li>• Identifying stakeholders</li> <li>• Defining project objectives</li> <li>• Establishing and documenting success criteria</li> <li>• Managing risks</li> <li>• Managing costs</li> <li>• Defining, controlling and managing stages</li> <li>• Managing resources</li> <li>• Defining roles and responsibilities</li> <li>• Managing communications</li> <li>• Ensuring deliverables are achieved</li> <li>• Conducting reviews</li> </ul>
	2.6.2 Describe a business case	A business case is a justification for a proposed project or undertaking on the basis of its expected commercial benefit

2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.6.3 List the components required to produce a thorough business case	<p>The components required to produce a thorough business case include:</p> <ul style="list-style-type: none"> <li>• Identify tangible (quantifiable) benefits, such as cost savings and/or productivity improvements over a specified time period</li> <li>• Identify intangible benefits, such as operational quality, time savings for customers</li> <li>• Develop options and recommendations, with associated benefits</li> <li>• Identify the risks associated with doing or not doing the options/recommendations</li> <li>• State the assumptions associated with the options/recommendations</li> <li>• Identify incremental revenue</li> <li>• Produce an ROI report written in business language</li> <li>• Proof-read to confirm accuracy before presenting</li> </ul>
2.7 Teamwork	2.7.1 Describe the objective and the components of teamwork	The objective of teamwork is to work together to achieve common goals
		<p>The components of teamwork include:</p> <ul style="list-style-type: none"> <li>• Work together to share ideas</li> <li>• Actively listen to each other</li> <li>• Share the workload fairly</li> </ul>

## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.7.2 Identify the characteristics of an effective team player	<p>An effective team player:</p> <ul style="list-style-type: none"> <li>• Participates in team activities</li> <li>• Displays courtesy and respect for others</li> <li>• Collaborates with team members</li> <li>• Is open-minded to the ideas of others</li> <li>• Shares knowledge</li> <li>• Contributes to and solicits ideas of others</li> <li>• Maintains a positive attitude</li> <li>• Has effective communication skills</li> <li>• Is enthusiastic</li> <li>• Is flexible</li> <li>• Is dependable</li> <li>• Trusts others</li> <li>• Offers encouragement</li> <li>• Follows through on tasks</li> <li>• Shares the workload fairly</li> <li>• Resolves conflicts</li> </ul>

## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>2.7.3 List the characteristics of an effective team</p>	<p>An effective team:</p> <ul style="list-style-type: none"> <li>• Has clear goals/objectives that support the strategies of the business and IT</li> <li>• Is empowered to make decisions</li> <li>• Displays a sense of participation</li> <li>• Has high productivity</li> <li>• Has good morale and motivation</li> <li>• Has multiple and varied skills</li> <li>• Has effective conflict resolution policies</li> <li>• Has a unified commitment</li> <li>• Meets agreed objectives and targets</li> </ul>
	<p>2.7.4 Explain the benefits of having an effective team</p>	<p>The benefits of having an effective team include:</p> <ul style="list-style-type: none"> <li>• An increased sense of belonging</li> <li>• A willingness to collaborate with and assist other team members</li> <li>• Improved productivity</li> <li>• Friendly and supportive work environment</li> <li>• Increased customer satisfaction</li> <li>• An environment of mutual trust and accountability</li> </ul>

## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.7.5 Describe a typical friendly and supportive workplace environment	In a typical friendly and supportive workplace there is: <ul style="list-style-type: none"><li data-bbox="826 434 1374 495">• Rapport demonstrated among the members of the team</li><li data-bbox="826 533 1238 593">• Evidence of empowerment from management</li><li data-bbox="826 631 1305 723">• A clear willingness within the team to collaborate with and assist other team members</li><li data-bbox="826 761 1374 790">• Responsible and trustworthy team members</li><li data-bbox="826 824 1254 853">• A diverse blend of team members</li><li data-bbox="826 887 1310 947">• Interest in each other's development is demonstrated</li></ul>

2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.8 Communication Skills	2.8.1 Identify the communication competencies required for a Service Desk Manager	<p>The communication competencies required for a Service Desk Manager include:</p> <ul style="list-style-type: none"> <li>• Communicating the service desk's goals, objectives and how they align with the IT and organization's objectives</li> <li>• Providing consistent and constructive feedback to their team(s)</li> <li>• Emphasizing the need for results, not just activity</li> <li>• Demonstrating confidence in their teams and matching words with actions</li> <li>• Demonstrating to their team(s) how progress is monitored, benchmarked, and corrected</li> <li>• Being able to 'push back' where appropriate and explain the reasoning</li> <li>• Selling successes and highlighting areas for improvement</li> <li>• Sharing the key management reports that show the ability of the service desk to meet goals and objectives</li> <li>• Including the service desk as a key component in the roll-out of new and upgraded systems</li> </ul>
	2.8.2 Identify appropriate channels of communication	<p>Appropriate channels of communication include:</p> <ul style="list-style-type: none"> <li>• Peer-group meetings</li> <li>• Target-group meetings</li> <li>• Mass meetings</li> <li>• E-mail</li> <li>• Telephone</li> <li>• Social networking</li> </ul>

2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.8.3 Define the purpose of a communication plan	The purpose of a communication plan is to coordinate all available channels of communication in order to improve the effectiveness of messages
	2.8.4 Creating an effective communication plan	To create an effective communication plan: <ul style="list-style-type: none"> <li>• Establish the timing and frequency of each message</li> <li>• Decide on the most effective channel to use for delivering the message</li> <li>• Adopt the simplest and most effective method to update the plan</li> <li>• Nominate an owner</li> </ul>
	2.8.5 Identify the purpose of conducting meetings	A meeting might be conducted for one or more of the following purposes: <ul style="list-style-type: none"> <li>• Planning</li> <li>• Distribute information, such as a briefing</li> <li>• Gather information - e.g. focus groups, workshops</li> <li>• Review team performance and areas identified for improvement</li> <li>• Disciplinary reasons</li> </ul>
	2.8.6 Describe methods used to conduct meetings	Meetings might be conducted using one or more of the following options: <ul style="list-style-type: none"> <li>• In person</li> <li>• Audio/telephone</li> <li>• Video</li> <li>• Digital - e.g. webcasts, hangouts, video chat</li> </ul>



## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>2.8.7 Identify the characteristics of a successful meeting</p>	<p>The characteristics of a successful meeting include:</p> <ul style="list-style-type: none"> <li>• Scheduling the meeting with adequate notice to ensure that participants have sufficient time to prepare</li> <li>• Appointing a chairperson</li> <li>• Publishing an agenda</li> <li>• Adhering to the agenda and times</li> <li>• Defining objectives</li> <li>• Identifying participants, location, and start/end times</li> <li>• Identifying the expectations of the participants</li> <li>• An environment where all participants can actively contribute</li> <li>• Documenting meeting accomplishments - e.g. open items, assigned action items and deadlines are documented and published in a timely manner</li> </ul>
	<p>2.8.8 Explain how to prepare written communications</p>	<p>When preparing a written communication:</p> <ul style="list-style-type: none"> <li>• Establish the purpose and audience</li> <li>• Recognize and understand the objectives of the audience</li> <li>• Collect, organize and analyze data</li> <li>• Write concisely</li> <li>• Use appropriate language</li> </ul>

## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>2.8.9 Identify requirements for preparing an effective presentation</p>	<p>The requirements for preparing an effective presentation include:</p> <ul style="list-style-type: none"> <li>• Identify the who, what, why, how, where and when and consider that some people prefer words, and others prefer graphics</li> <li>• Use visual aids - e.g. slides, flip charts, white boards</li> <li>• Provide supporting documentation if required</li> <li>• Consider using virtual tools</li> <li>• Identify the three key stages:               <ul style="list-style-type: none"> <li>○ Introduction</li> <li>○ Main body</li> <li>○ Summary</li> </ul> </li> <li>• Express key points clearly</li> <li>• Use terminology the audience will understand</li> <li>• Review and practice in advance</li> <li>• Recognize cultural differences</li> <li>• Identify what techniques are appropriate for the audience</li> <li>• Plan how to obtain feedback</li> <li>• Be aware of body language</li> </ul>

## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.8.10 Identify considerations for developing a presentation	<p>Considerations for developing a presentation include the:</p> <ul style="list-style-type: none"><li>• Message and style of the presentation</li><li>• Corporate style and branding</li><li>• Color of the font and the background</li><li>• Typestyle and size of the font</li><li>• Number of items and amount of text on each slide</li><li>• Available time</li><li>• Position of audio-visual equipment</li><li>• Welfare requirements of the audience</li></ul>

## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>2.8.11 Identify considerations when using online collaborative conferencing services</p>	<p>Considerations for using on-line collaborative conferencing services such as web conferencing, web seminars (webinars) and webcasts include:</p> <ul style="list-style-type: none"> <li>• Style and content</li> <li>• Digital features available</li> <li>• Slideshow presentation</li> <li>• Live or streaming feature</li> <li>• Use of whiteboards</li> <li>• Use of text chat</li> <li>• Polls and surveys</li> <li>• Web tours</li> <li>• Screen/desktop/application sharing</li> <li>• Document sharing</li> <li>• Recording</li> <li>• Body language</li> <li>• Absence of eye-to-eye contact</li> <li>• Timing and managing of breaks</li> <li>• How to check for agreement and obtain feedback</li> </ul>

## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	2.8.12 Identify techniques for engaging the audience	Techniques for engaging the audience include: <ul style="list-style-type: none"><li data-bbox="826 434 1302 526">• Ask questions designed to elicit verbal responses and participation from the audience</li><li data-bbox="826 564 1350 622">• Give the audience a tangible vision of your ideas</li><li data-bbox="826 660 1318 696">• Use real life experiences and anecdotes</li><li data-bbox="826 725 1174 761">• Do not rely solely on slides</li><li data-bbox="826 790 1331 853">• Use graphics and colors in presentations rather than text lists and bullet</li></ul>

## 2. Leadership and Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.9 Listening Skills	2.9.1 Describe the behaviors that demonstrate effective listening skills	<p>The behaviors that demonstrate effective listening skills are:</p> <p>Face to face:</p> <ul style="list-style-type: none"> <li>• Stop what you are doing and turn your body towards the person</li> <li>• Use appropriate eye contact</li> <li>• Adopt a suitable position</li> <li>• Paraphrase and question where appropriate to verify understanding</li> <li>• Take notes to summarize information received and given but do not write constantly</li> </ul> <p>On the phone:</p> <ul style="list-style-type: none"> <li>• Make appropriate verbal responses</li> <li>• Ask questions and paraphrase to verify understanding</li> <li>• Avoid inappropriate interruptions</li> <li>• Focus on the person talking</li> <li>• Take notes to summarize information received and given but do not write constantly</li> </ul>

2. Leadership and Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
2.10 Information Gathering Methods	2.10.1 Identify the differences between the three information gathering methods	<p>The three information gathering methods are:</p> <p>One-way:</p> <ul style="list-style-type: none"> <li>• Customers provide information without being prompted</li> <li>• Out-of-hours requests</li> <li>• Voicemail, e-mail, letters</li> </ul> <p>Structured:</p> <ul style="list-style-type: none"> <li>• Common, ordered and repetitive types of service requests and incidents</li> <li>• Pre-defined format and sequence - e.g. web portal forms</li> </ul> <p>Unstructured:</p> <ul style="list-style-type: none"> <li>• Free-form questions are asked</li> </ul>
2.11 Negotiation Skills	2.11.1 Describe the requirements for successful negotiation	<p>The requirements for successful negotiation include:</p> <ul style="list-style-type: none"> <li>• Seek a win-win solution</li> <li>• Establish the underlying need</li> <li>• Separate the person from the problem</li> <li>• Acknowledge the benefit of the other person's idea, from their perspective</li> <li>• Discuss each other's perceptions</li> <li>• Solicit participation from all stakeholders</li> <li>• Set objective criteria to measure results</li> <li>• Recognize that different personality types, emotions and motivations of participants exist and know how to address them</li> </ul>

## 2. Leadership and Management

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



3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.1 Recruitment	3.1.1 Identify requirements for effective service desk recruitment	<p>The requirements for effective service desk recruitment include:</p> <ul style="list-style-type: none"> <li>• Identify the competencies necessary for the position</li> <li>• Ensure job descriptions and role profiles are up to date and properly reflect the activities the candidate will be required to perform</li> <li>• Perform a skills gap analysis</li> <li>• Identify the appropriate salary for the position</li> <li>• Follow the organization's recruitment processes and procedures</li> </ul>
	3.1.2 Identify the elements included in a recruitment process	<p>Examples of the elements included in a recruitment process are:</p> <ul style="list-style-type: none"> <li>• Application review</li> <li>• Short list for interview based on objective criteria</li> <li>• A structured and defined interviewing processes</li> <li>• Model team members are involved in the interview and selection process</li> <li>• Telephone interviews are performed</li> <li>• References are verified</li> <li>• Relevant techniques for evaluating skills are employed</li> </ul>

	<p>3.1.3 Identify qualities and skills to look for in staff</p>	<p>Qualities and skills to look for when recruiting staff include:</p> <p>Attributes (qualities):</p> <ul style="list-style-type: none"> <li>• Accepts change and adapts easily</li> <li>• Learns quickly</li> <li>• Multi-tasks</li> <li>• Good temperament (patient, empathetic)</li> <li>• Problem-solver</li> <li>• Customer service ethos</li> <li>• Accepts personal accountability</li> <li>• Self-motivated</li> <li>• Team player</li> <li>• Follows policies, procedures and guidelines</li> <li>• Continually improves</li> <li>• Calm under pressure</li> </ul> <p>Skills (abilities):</p> <ul style="list-style-type: none"> <li>• Communication</li> <li>• Listening</li> <li>• Writing</li> <li>• Verbal</li> <li>• Non-verbal</li> <li>• Questioning</li> <li>• Knowledge</li> <li>• Technical</li> <li>• Business</li> <li>• ITSM (useful)</li> <li>• Customer service</li> <li>• Troubleshooting</li> </ul>
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3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
		<ul style="list-style-type: none"> <li>• Problem solving</li> <li>• Time management</li> <li>• Personal organizational skills</li> </ul>
3.2 Staff Induction and Training	3.2.1 Describe the features of a structured induction planning process	<p>The features of a structured induction planning process for IT and service desk staff include:</p> <ul style="list-style-type: none"> <li>• A task list of key pre-induction activities, such as set up logins, plan the staffing rota</li> <li>• A standard agenda of key points to cover <ul style="list-style-type: none"> <li>○ The organization's goals</li> <li>○ The organization's structure</li> <li>○ Key contacts</li> <li>○ Human resources and employment issues</li> <li>○ IT goals</li> <li>○ IT services</li> <li>○ Service level agreements</li> <li>○ IT security</li> <li>○ The organization's policies, processes and procedures</li> <li>○ Customers</li> <li>○ IT contacts</li> <li>○ Technical data</li> </ul> </li> <li>• Defining milestones and scheduling regular process reviews</li> <li>• Agreeing the key individuals to be involved in the process</li> <li>• Reviewing the mechanism of the process and the ownership of the content</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.2.2 Describe the benefits of a structured approach to induction	<p>The primary benefits of a structured approach to induction include:</p> <ul style="list-style-type: none"> <li>• Reduced time to get new staff working effectively</li> <li>• Reduced risk of basic errors and misunderstandings</li> <li>• Reduced risk of adopting bad habits</li> <li>• A focus on coordinated activities improves communications across departments</li> </ul>
	3.2.3 Describe the features of a structured approach to training	<p>The features of a structured approach to training include:</p> <ul style="list-style-type: none"> <li>• A structured training plan for all service desk staff is in place</li> <li>• A skills matrix of soft and technical skills is in place for all staff</li> <li>• A training budget is in place with a set allocation for staff training days</li> <li>• A training plan linked to the job role and KPIs, plus career goals</li> <li>• The training plan is reviewed by staff and manager at least annually</li> <li>• Feedback from reviews and appraisals is used to develop practical training programs</li> <li>• Feedback from reviews and appraisals is held in human resource records and reviewed annually</li> <li>• A review mechanism of the training process is in place and ownership of the content is identified</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.2.4 Describe the benefits of a structured approach to training	<p>The primary benefits of a structured approach to training are:</p> <ul style="list-style-type: none"> <li>• Up-to-date knowledge and skills</li> <li>• Improved staff productivity and consistency</li> <li>• Reduced risk of errors and failures</li> <li>• Reduced cost of failures</li> <li>• More effective use of training budget</li> <li>• Improved morale</li> <li>• Improved job satisfaction</li> </ul>
3.3 Retention	3.3.1 Demonstrate the behaviors for creating a positive working environment	<p>Behaviors for creating a positive working environment include:</p> <ul style="list-style-type: none"> <li>• Treat everyone with respect</li> <li>• Recognize team and individual accomplishments</li> <li>• Communicate team goals and successes</li> <li>• Communicate and celebrate success</li> <li>• Offer a competitive benefits package</li> <li>• Involve employees in decision making</li> <li>• Seek feedback</li> <li>• Create learning opportunities</li> <li>• Create a sense of belonging</li> <li>• Share information</li> <li>• Consider offering flexible work schedules</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.3.2 Demonstrate the behaviors for achieving long-term working relationships with members of your staff	<p>Behaviors for achieving long-term working relationships with members of your staff include:</p> <ul style="list-style-type: none"> <li>• Treat team members with respect</li> <li>• Treat all staff fairly</li> <li>• Review the team's structure for opportunities to make best use of the skills of team members</li> <li>• Provide opportunities for staff to use a variety of skills</li> <li>• Delegate authority for decision making where appropriate</li> <li>• Be consistent</li> <li>• Be supportive in order to facilitate optimum performance</li> <li>• Evaluate and develop the performance of team members</li> <li>• Build a skills matrix of staff with their target and actual skills levels in order to develop a training plan</li> <li>• Provide career and personal development opportunities</li> <li>• Encourage feedback and new ideas from staff</li> </ul>

### 3. People Management

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>3.3.3 Describe how to constructively address individual performance issues</p>	<p>To constructively address individual performance issues:</p> <ul style="list-style-type: none"> <li>• Ensure the organization’s policies are followed</li> <li>• Handle issues in a timely manner</li> <li>• Be specific and not general in your discussions</li> <li>• Discuss the causes of the issue before the solution</li> <li>• Keep the focus of the discussion on the specific issue/behavior</li> <li>• Explain to the individual the importance of change to them and to the team</li> <li>• Discuss the potential growth opportunities implicit in change</li> <li>• Focus on changing the behavior rather than changing the person</li> <li>• Communicate the desired outcome of the change in behavior</li> <li>• Document follow-up actions</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.3.4 Employ methods for gathering the information required to measure employee satisfaction information	<p>Methods for gathering employee satisfaction information for analysis include:</p> <ul style="list-style-type: none"> <li>• Structured feedback mechanisms (internal surveys, appraisal process)</li> <li>• Regular 'one-to-ones' with staff and managers</li> <li>• Feedback from team discussions</li> <li>• Informal and social interaction</li> <li>• Observing changes in team and individual performance</li> <li>• Keeping staff morale as a regular item at management meetings</li> <li>• Regular reviews of absenteeism data</li> <li>• Exit interviews</li> </ul>
3.4 Management	3.4.1 Identify the major activities of a manager	<p>The major activities of a manager are to:</p> <ul style="list-style-type: none"> <li>• Plan</li> <li>• Organize resources</li> <li>• Direct, control and co-ordinate activities</li> </ul>
	3.4.2 Explain the different types of planning	<p>The different types of planning include:</p> <p>Strategic planning</p> <ul style="list-style-type: none"> <li>• The long-term vision of what an organization needs to achieve in order to meet its objectives</li> </ul> <p>Tactical planning</p> <ul style="list-style-type: none"> <li>• The detailed plan for achieving the objectives set by the strategic plan</li> </ul> <p>Operational planning</p> <ul style="list-style-type: none"> <li>• The day-to-day work routine that focuses on operational tasks and long-term projects</li> </ul>



3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.4.3 List the elements required for developing successful plans	<p>The elements required for developing successful plans include:</p> <ul style="list-style-type: none"> <li>• Define the mission objectives</li> <li>• Develop short, medium, and long-term objectives designed to help meet strategic goals</li> <li>• Assess and manage risks</li> <li>• Set goals and objectives</li> <li>• Set budgets</li> <li>• Review and develop new processes and service improvement plans</li> </ul>
	3.4.4 Demonstrate how to successfully organize resources	<p>To successfully organize resources:</p> <ul style="list-style-type: none"> <li>• Define the appropriate structure</li> <li>• Identify resource requirements</li> <li>• Align resources to projects, processes, and activities</li> <li>• Identify required skills</li> <li>• Ensure that resources are in the right place, with the correct skills and attitude, at the right time</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.4.5 Describe how to direct, control and coordinate activities	<p>To direct, control and co-ordinate activities:</p> <ul style="list-style-type: none"> <li>• Set the direction, influence the team, and individuals</li> <li>• Delegate and empower where appropriate</li> <li>• Prioritize tasks appropriately</li> <li>• Provide guidance when required</li> <li>• Obtain feedback, analyze and recommend: <ul style="list-style-type: none"> <li>○ Processes</li> <li>○ Procedures</li> <li>○ Systems</li> <li>○ Resources</li> </ul> </li> <li>• Monitor, review and report against agreed measures</li> </ul>
3.5 Leadership	3.5.1 Explain the benefits of motivation	<p>The benefits of motivation include:</p> <ul style="list-style-type: none"> <li>• Innovation is encouraged</li> <li>• People are inspired to achieve new visions</li> <li>• Inspires delivery of consistent, high-quality service</li> <li>• Commitment to the aspirations of the service desk</li> <li>• Improves staff development and direction</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.5.2 Describe methods to improve service desk performance	<p>Methods for improving service desk performance include:</p> <ul style="list-style-type: none"> <li>• Review and analyze past successes to identify strengths, weaknesses, opportunities, and threats (SWOT) in order to identify areas for growth</li> <li>• Implement continual improvement programs</li> <li>• Develop programs that reward initiative</li> <li>• Test staff on their usage and understanding of the activities, policies, processes, and procedures required to fulfill their role</li> <li>• Set challenging S.M.A.R.T goals (Specific, Measurable, Achievable, Realistic, Timely)</li> <li>• Benchmark with best practices and/or other service desks</li> </ul>
	3.5.3 Describe how to recognize and reward staff	<p>To recognize and reward staff:</p> <ul style="list-style-type: none"> <li>• Highlight individual and team contributions individually and publicly</li> <li>• Recognize and publicize in a manner meaningful to the recipient</li> <li>• Reinforce and recognize desired behaviors in a timely manner</li> <li>• Consistent and fair recognition and reward programs</li> <li>• Work creatively within the organization's guidelines</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.5.4 Describe ways to provide direction and focus during challenging circumstances, such as major incidents or periods of uncertainty	<p>Examples of ways to provide direction and focus during ambiguous or chaotic circumstances include:</p> <ul style="list-style-type: none"> <li>• Create a communication hub so that people can get accurate information quickly</li> <li>• Empathize with team members</li> <li>• Use your presence to help provide clarity, guidance, and direction</li> <li>• Create an environment in which team members can experience a sense of continuity and control in their work lives</li> </ul>
3.6 Mentoring	3.6.1 Describe mentoring	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
	3.6.2 Explain the benefits of mentoring	<p>The benefits of mentoring:</p> <ul style="list-style-type: none"> <li>• People learn more quickly</li> <li>• Strengthens self-development</li> <li>• Provides help for the immediate challenges of the mentee</li> <li>• Develops inter-personal skills</li> <li>• Helps people cope with their role</li> <li>• Offers a safe environment for discussion and advice</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.6.3 Describe the benefits of peer mentoring (buddying)	<p>The benefits of peer mentoring include:</p> <ul style="list-style-type: none"> <li>• Builds a sense of community</li> <li>• Reduces time for new members to reach competency</li> <li>• Increases trust and respect among team members</li> <li>• Supports colleagues in their professional development and growth</li> <li>• Facilitates mutual learning</li> <li>• Provides functional cross-training</li> <li>• Maintains a good balance of skills</li> <li>• Simplifies integration into a team</li> <li>• Improves performance, leads to increased productivity by focusing on skills and competencies at a personal level</li> </ul>
3.7 Coaching	3.7.1 Describe coaching	<p>Coaching is a process of learning and developing competent performance in the workplace - usually in the form of regular structured sessions between a suitable coach and a 'coachee' in order to explore current competency levels, issues, attainments, ideas and possibilities. It is performance and task related and aims to:</p> <ul style="list-style-type: none"> <li>• Establish specific, short-term objectives and outcomes</li> <li>• Develop potential or change behavior</li> <li>• Help establish individual performance goals</li> <li>• Help define the current position in relation to goals</li> <li>• Identify the opportunities to achieve the goals</li> <li>• Establish the will to undertake the required actions to achieve the goals</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.7.2 Explain the benefits of coaching	<p>The benefits of coaching include:</p> <ul style="list-style-type: none"> <li>• Improved professionalism and morale</li> <li>• Improved customer service and engagement quality</li> <li>• Helps the team to grow and excel</li> <li>• Improved performance leading to increased productivity by focusing on skills and core competencies at or above the standard required by the organization</li> </ul>
	3.7.3 Describe how to prepare to coach an analyst	<p>To prepare to coach an analyst:</p> <ul style="list-style-type: none"> <li>• Assess the employee's abilities, competencies, and commitment level</li> <li>• Identify the goals and issues</li> <li>• Define the coaching plan</li> </ul>
	3.7.4 Describe the coaching process	<p>The coaching process:</p> <ul style="list-style-type: none"> <li>• Create an environment of trust</li> <li>• Define and communicate the reason for the coaching session</li> <li>• Begin a dialogue on ways to improve or excel</li> <li>• Listen with empathy</li> <li>• Encourage participation in the process by asking open questions</li> <li>• Test understanding</li> <li>• Use the analysts' suggestions whenever possible</li> <li>• Agree on an action plan: who will do what and when</li> <li>• Schedule a follow-up meeting within an appropriate timeframe</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.7.5 Display the characteristics of an effective coach	<p>An effective coach takes the time to listen to the coachee and understand their:</p> <ul style="list-style-type: none"> <li>• Career goals</li> <li>• Strengths and weaknesses</li> <li>• Career development opportunities</li> <li>• Opinion of own competency and ability</li> </ul> <p>An effective coach also:</p> <ul style="list-style-type: none"> <li>• Recognizes the difference between coach, trainer, and manager</li> <li>• Allows the coachee to arrive at conclusions the coach already knows</li> <li>• Creates an action plan with each individual</li> <li>• Follows up to discuss progress and help fulfill the coachee's potential</li> </ul>
3.8 Professional Development	3.8.1 Identify methods for assessing the development needs of the service desk and service desk staff	<p>Methods for assessing development needs of service desk staff include:</p> <ul style="list-style-type: none"> <li>• Skills gap analysis</li> <li>• Role profiling</li> <li>• One-to-ones</li> <li>• Individual assessment (appraisal)</li> <li>• SWOT analysis</li> <li>• Informal feedback from other individuals or teams</li> <li>• 360 degree or peer assessment</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>3.8.2 Identify examples of common methods used for professionally developing staff</p>	<p>Examples of common methods used to professionally develop staff include:</p> <ul style="list-style-type: none"> <li>• On-the-job, computer-based training and instructor-led training</li> <li>• Virtual training</li> <li>• Provide staff with access to formal and informal training resources</li> <li>• Coaching</li> <li>• Mentoring</li> <li>• Secondment to other teams/departments</li> <li>• Continual improvement program</li> <li>• The achievement of relevant industry qualifications</li> <li>• Attending relevant conferences, seminars, virtual conferences, and webinars</li> </ul>
	<p>3.8.3 Describe how to maintain and enhance personal development</p>	<p>To maintain and enhance personal development:</p> <ul style="list-style-type: none"> <li>• Create a personal network of advisers with whom you can share problems and concerns</li> <li>• Concentrate on common goals during times of disagreement</li> <li>• Take on projects that are outside your comfort zone</li> <li>• Study management/motivation books, e-books, industry publications and podcasts</li> <li>• Join and participate in professional organizations</li> <li>• Attending relevant conferences, seminars, virtual conferences, and webinars</li> </ul>



3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
3.9 Resilience	3.9.1 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
	3.9.2 List some common causes of stress	<p>Some common causes of stress</p> <p>Positive:</p> <ul style="list-style-type: none"> <li>• Promotion at work</li> <li>• Learning a new skill</li> <li>• Starting a new job</li> <li>• Personal life situations</li> <li>• Change</li> </ul> <p>Negative:</p> <ul style="list-style-type: none"> <li>• Too much work for available resources</li> <li>• Not enough time or ineffective use of time</li> <li>• Lack of skills, knowledge or appropriate training</li> <li>• Ineffective management</li> <li>• Money</li> <li>• No self-confidence</li> <li>• Insufficient rest</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.9.3 Describe some of the signs of positive stress	Some common signs of positive stress include: <ul style="list-style-type: none"> <li>• Smiling faces</li> <li>• Friendly chat</li> <li>• Enthusiasm</li> <li>• Helpful attitude</li> <li>• Energetic</li> </ul>
	3.9.4 Describe some of the signs of negative stress	Some common signs of negative stress include: <ul style="list-style-type: none"> <li>• Increased respiration and perspiration</li> <li>• Redness of face</li> <li>• Anxious behavior</li> <li>• Changes in appearance</li> <li>• Vulnerability to illness</li> <li>• Inability to concentrate</li> <li>• Over reaction</li> <li>• Mood swings</li> <li>• Short tempered or irritable</li> <li>• Extremely negative or sarcastic and cynical attitude</li> </ul>

3. People Management		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	3.9.5 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"> <li>• Recognize situations and work to limit the impact of workplace stress</li> <li>• Maintain an awareness and understanding of the organization's health and wellbeing policies</li> <li>• Offer support to staff and colleagues who show signs of stress</li> <li>• Take proactive and positive actions to reduce stress for ourselves, staff, and colleagues</li> <li>• Ensure staff have access to health and wellbeing resources</li> <li>• Raise concerns about your own stress levels</li> </ul>
	3.9.6 List actions that reduce stress	<p>Some actions that may help to reduce stress include:</p> <ul style="list-style-type: none"> <li>• Recognize signs of stress in yourself and others</li> <li>• Prioritize goals and set realistic expectations</li> <li>• Manage your time effectively</li> <li>• Talk about how you are feeling and your concerns</li> <li>• Use breathing techniques</li> <li>• Maintain a healthy work-life balance</li> <li>• Visit a Doctor if symptoms continue or affect your well-being</li> <li>• Take annual leave</li> <li>• Participate in physical exercise</li> </ul>

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
4.1 Service and Support Delivery Methods	4.1.1 Identify methods used for delivering service and support	<p>Methods used for service and support delivering include:</p> <ul style="list-style-type: none"> <li>• Telephone</li> <li>• Face to face</li> <li>• Remote control</li> <li>• Email</li> <li>• Collaboration tools</li> <li>• Self-service</li> <li>• Live chat</li> <li>• Chatbots</li> <li>• Virtual agent</li> <li>• Social media</li> </ul>
	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 for using IT service management tools	<p>The primary objectives for using IT service management tools in a service desk environment are to:</p> <ul style="list-style-type: none"> <li>• Record, track and manage incidents, service requests, problems, and changes</li> <li>• Provide service performance reports and management information from a single tool</li> <li>• Integrate with other systems of support - e.g. event monitoring, asset management and knowledge management systems</li> </ul>
	4.1.4 Explain the benefits of telephone support as a service delivery method	<p>The benefits of delivering support by telephone include:</p> <ul style="list-style-type: none"> <li>• Rapid access to service desk staff</li> <li>• Interactive two-way communication</li> </ul>

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.1.5 Recognize common challenges of telephone support as a service delivery method	Common challenges of telephone support include: <ul style="list-style-type: none"> <li>• Only being able to deal with one request or incident at a time</li> <li>• Information needed not immediately available</li> </ul>
	4.1.6 Explain the benefits of using face to face support as a service delivery method	The benefits of desk-side support delivery include: <ul style="list-style-type: none"> <li>• One-to-one and face-to-face communication with customers establishes better rapport</li> <li>• Support analysts can view the environment from the customer's perspective</li> <li>• A better understanding of the customer's situation/environment is achieved</li> </ul>
	4.1.7 Recognize common challenges of face to face as a service delivery method	Common challenges of desk-side support include: <ul style="list-style-type: none"> <li>• Only being able to deal with one request or incident at a time</li> <li>• Not being cost effective</li> </ul>
	4.1.8 Explain the benefits of remote support	Using remote support tools has the following benefits: <ul style="list-style-type: none"> <li>• Customer's devices are visible to the analyst</li> <li>• It is time effective</li> <li>• Faster diagnosis and resolution of issues</li> <li>• Fewer issues are escalated, improving first contact resolution</li> <li>• Provides an opportunity to train customers to be self-sufficient</li> <li>• May offer a better customer experience, improving customer satisfaction</li> </ul>

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.1.9 Recognize common challenges of using remote support tools	Common challenges of remote support are: <ul style="list-style-type: none"> <li>• Security considerations</li> <li>• Silent time</li> <li>• Customers might feel excluded unless they are kept verbally informed of the steps being taken during the remote support session</li> </ul>
	4.1.10 Explain 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"> <li>• Provides a real-time written channel of communication</li> <li>• Negates the effect of misunderstanding due to language barriers</li> <li>• Nurtures relationships with remote colleagues and customers</li> <li>• Provides an alternative digital dialogue</li> </ul>
	4.1.11 Recognize common challenges of using live chat and collaboration tools	Common challenges of using live chat and collaboration tools include: <ul style="list-style-type: none"> <li>• Less personal</li> <li>• Silent time</li> <li>• Can lead to misunderstandings - e.g. lack of tone</li> </ul>
	4.1.12 Describe Automatic Call Distribution (ACD)	ACD routes calls based on predefined processes and algorithms

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.1.13 List common automatic call distribution (ACD) features	Common ACD features include: <ul style="list-style-type: none"> <li>• Call distribution</li> <li>• Skills based routing</li> <li>• Availability routing</li> <li>• Call queuing</li> <li>• Advanced reporting</li> </ul>
4.2 Workforce Management	4.2.1 Describe the objective of workforce management	The objective of workforce management is to establish the resource requirements necessary to meet business demands in order to achieve goals
	4.2.2 Explain the benefits of resource planning models	The benefits of workforce planning models is that they: <ul style="list-style-type: none"> <li>• Quantify the staffing and scheduling based on accepted operational management models</li> <li>• Quantify the staffing required to meet the SLA and business needs</li> <li>• Provide a consistent approach</li> </ul>
	4.2.3 Summarize the steps involved in resource scheduling	The steps involved in resource scheduling include: <ul style="list-style-type: none"> <li>• Forecast volumes using historical and current data and information about future requirements</li> <li>• Establish staffing requirements based on projected volume and service levels</li> <li>• Develop a schedule</li> <li>• Evaluate and monitor performance in comparison to projections</li> <li>• Adjust plans and expectations as necessary</li> </ul>
4.3 Self-service	4.3.1 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), while reducing the cost of service delivery and improving the customer experience

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.3.2 Explain the primary objectives of self-service	<p>The primary objectives of self-service are to provide customers with the ability to:</p> <ul style="list-style-type: none"> <li>• Log and track the status of their incidents and service requests</li> <li>• Update their contact details</li> <li>• Update information contained in incident or service request records</li> <li>• Receive notification about outages and upcoming scheduled changes and maintenance</li> <li>• To obtain information to self-resolve simple issues</li> </ul>
	4.3.3 List common examples of self-service	<p>Examples of self-service include:</p> <ul style="list-style-type: none"> <li>• Self-logging and tracking portal</li> <li>• Password resets</li> <li>• Knowledge bases</li> <li>• Application web-based help systems</li> <li>• FAQs</li> <li>• Application repositories</li> <li>• Fact sheets</li> <li>• On-line training/tutorials</li> </ul>



4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>4.3.4 Explain the benefits of using self-service as a service delivery method</p>	<p>The benefits of using self-service as a service delivery method include:</p> <ul style="list-style-type: none"> <li>• 24x7 availability, regardless of the service desk's operating hours</li> <li>• Relieves pressure on the service desk</li> <li>• Offers an alternative channel for obtaining support</li> <li>• Lowers the cost of support</li> <li>• Provides customers with easy access to the support organization</li> <li>• Provides customer updates</li> <li>• Allows customers to check the status of their current incidents or service requests</li> <li>• May allow customers to resolve simple issues without the assistance of an analyst - e.g. password resets, adding printers, mapping drives</li> <li>• Support resources can focus on other issues</li> </ul>
	<p>4.3.5 Identify common challenges of self-service</p>	<p>Common challenges of self-service include:</p> <ul style="list-style-type: none"> <li>• Inaccurate, irrelevant, or out of date information</li> <li>• Increased cost of maintenance</li> <li>• Perceived loss of personalized service</li> <li>• Might take longer to resolve issues</li> <li>• Creates the perception of 24/7 support</li> </ul>
4.4 Automation	4.4.1 Describe automation	Automation is technology by which a process or procedure is performed with minimal human interaction.

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.4.2 List common examples of automation	Common examples of automation include: <ul style="list-style-type: none"> <li>• Skills based routing</li> <li>• Self-healing</li> <li>• Machine learning</li> <li>• Automated testing and deployment</li> <li>• Event and alert monitoring and diagnostic tools</li> </ul>
	4.4.3 Identify the benefits of automation	Key benefits of automation include: <ul style="list-style-type: none"> <li>• Reduced cost of support</li> <li>• Reduced need for reactive support</li> <li>• Improved utilization of IT staff</li> <li>• Increased productivity</li> <li>• Automated system recovery or workarounds</li> <li>• Improved availability of services</li> <li>• Reduced resolution time for some incidents</li> <li>• Seamless service provision</li> </ul>
4.5 Artificial Intelligence (AI)	4.5.1 Describe AI	AI in Service Management can be split in to two different areas, which are: <p>Rules-based</p> <ul style="list-style-type: none"> <li>• Systems execute code and decisions based on a series of logical rules</li> </ul> <p>Neural networks</p> <ul style="list-style-type: none"> <li>• Systems identify patterns from feeds of vast amounts of data upon which decisions are based</li> </ul>

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	4.5.2 List common examples of rules-based AI	Common examples of rules-based AI include: <ul style="list-style-type: none"> <li>• Chat bots</li> <li>• Robotic Process Automation</li> </ul>
	4.5.3 List common examples of neural networks	Common examples of neural networks include: <ul style="list-style-type: none"> <li>• Voice recognition</li> <li>• Face recognition</li> <li>• Autonomous cars</li> </ul>
	4.5.4 Identify the benefits of AI	Key benefits of AI include: <ul style="list-style-type: none"> <li>• Supporting the optimization of working practices</li> <li>• Improved security e.g. threats detected faster</li> <li>• Eliminating errors</li> <li>• Increasing productivity</li> <li>• Improving value e.g. the customer experience and cost of service delivery</li> </ul>
	4.5.5 Identify the challenges of AI	Common examples of the challenge's organizations may encounter with AI adoption include: <ul style="list-style-type: none"> <li>• Reskilling staff</li> <li>• The availability and integrity of data</li> <li>• The consistency and predictability of results and outcomes</li> <li>• Integration with existing ITSM tools</li> </ul>

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
4.6 Cloud computing	4.6.1 Describe the meaning of cloud computing in a service desk environment	<p>Cloud computing is a generic term for internet-based access to technology enabled services. The four key cloud delivery models are:</p> <ul style="list-style-type: none"> <li>• Software-as-a-Service (SaaS) - offers ready built applications provided directly via an internet connection. This delivery method is used by many service desk tool providers</li> <li>• Infrastructure-as-a-Service (IaaS) - offers pay-as-you-go (consumption based) access to servers, disk space and networks</li> <li>• Platform-as-a-Service (PaaS) - provides a pre-built infrastructure (platform) facilitating applications to be deployed directly by subscribers</li> <li>• Business Process-as-a-Service (BPaaS) - usually offers a combination of other pay-as-you-go 'as-a-Service' offerings. A supplier organization will provide business services to multiple customers to provide extra capacity when needed - e.g. call center, HR or payroll processing</li> </ul>
	4.6.2 Explain the benefits of using cloud computing technology	<p>Key benefits of using cloud computing technology include:</p> <ul style="list-style-type: none"> <li>• Reduced / flexible costs - e.g. operating expenditure</li> <li>• Quick set up and deployment</li> <li>• Improved accessibility</li> <li>• Reduced maintenance overhead</li> <li>• Ease of scalability</li> </ul>
	4.6.3 Identify common challenges of using cloud computing technology in a service desk environment	<p>Common challenges of using cloud computing technology include:</p> <ul style="list-style-type: none"> <li>• Connectivity requirements</li> <li>• Security and data accessibility</li> <li>• Reduced overall control</li> </ul>

4. Resources		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
4.7 Social Media	4.7.1 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> <ul style="list-style-type: none"> <li>• It comprises primarily internet and mobile app-based tools</li> <li>• It transforms people from content consumers into content producers</li> <li>• It enables organizations to build stronger relationships with customers and markets</li> </ul>
	4.7.2 Explain how to use social media tools effectively	<p>To use social media tools effectively in business:</p> <ul style="list-style-type: none"> <li>• Recognize the difference between traditional media and social media</li> <li>• Follow the organization's strategy for engaging with its market</li> <li>• Build communities in order to share knowledge</li> <li>• Be an ambassador for the organization's brand</li> <li>• Be transparent</li> <li>• Analyze content</li> </ul>
	4.7.3 Identify the challenges associated with social media tools	<p>The challenges associated with social media tools include:</p> <ul style="list-style-type: none"> <li>• Malicious code and virus distribution</li> <li>• Spam, phishing, vishing and hacking</li> <li>• Fraud</li> <li>• Negative comments or feedback in the public domain</li> <li>• Employee productivity</li> <li>• Sharing of confidential information</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
5.1 Information Technology Service Management (ITSM)	5.1.1 Describe IT service management (ITSM)	IT service management (ITSM) is a concept that enables an organization to maximize the co-creation of business value from the innovative use of information technology.
	5.1.2 Explain the objectives of IT service management (ITSM)	The objectives of ITSM include: <ul style="list-style-type: none"> <li>• To ensure value co-creation for the organization and its customers</li> <li>• To support digital transformation across the enterprise</li> <li>• To position IT as a strategic asset and capability</li> <li>• To break down silos and enable cross-functional working and capabilities</li> <li>• To ensure organizations can flourish in the face of significant and ongoing change</li> <li>• To ensure value is identified and achieved through the embracement of new technologies and ways of working</li> <li>• To balance the need for stability with the need for operational agility and flexibility</li> </ul>
	5.1.3 Explain the differences between practices, processes, and procedures	Practices: <ul style="list-style-type: none"> <li>• Sets of organizational resources designed for performing work or achieving objectives</li> </ul> Processes: <ul style="list-style-type: none"> <li>• Series of steps, actions and decisions involved in the way work is completed in order to achieve a consistent and sustainable outcome</li> </ul> Procedures: <ul style="list-style-type: none"> <li>• The detailed description of the way each step, action, and decision are to be carried out</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>5.1.4 Explain the importance of documenting practices, processes and procedures</p>	<p>It is important to document practices, processes and procedures in order to:</p> <ul style="list-style-type: none"> <li>• Encourage the understanding and adherence to practices, processes, and procedures for consistency and sustainability</li> <li>• Assist with auditing</li> <li>• Assist with dispute resolution</li> <li>• Clearly define roles and responsibilities</li> <li>• Allow others to perform tasks when key people are not available</li> <li>• Assist the service desk with adapting to changes</li> <li>• Enable knowledge sharing</li> <li>• Assist with continual improvement initiatives</li> </ul>
	<p>5.1.5 Explain the importance of following processes and procedures</p>	<p>It is important to follow documented processes and procedures in order to:</p> <ul style="list-style-type: none"> <li>• Ensure consistent service delivery</li> <li>• Improve efficiency, effectiveness, and productivity</li> <li>• Enable new staff to become effective more quickly</li> <li>• Promote common understanding</li> <li>• Build the analyst's confidence in their ability to professionally manage interactions</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.1.6 Describe ITIL®	<p>ITIL provides the guidance organizations need to address new service management challenges and utilize the potential of modern technology. It is designed to ensure a flexible, co-ordinated and integrated system for the effective governance and management of IT-enabled services.</p> <p>ITIL is a flexible and comprehensive framework, which guides organizations through the creation, delivery and support of IT services and covers:</p> <ul style="list-style-type: none"> <li>• The Four Dimensions of IT Service Management</li> </ul> <p>The Service Value System which incorporates:</p> <ul style="list-style-type: none"> <li>• Guiding Principles</li> <li>• Governance</li> <li>• Service Value Chain</li> <li>• Practices</li> <li>• Continual Improvement</li> </ul>
5.2 Incident Management	5.2.1 Describe the purpose of incident management	The purpose of incident management is to minimise the negative impact of incidents by restoring normal service operation as quickly as possible
	5.2.2 Describe an incident	An incident is an unplanned interruption to a service or reduction in the quality of the service.



5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.2.3 Explain the objectives of incident management	<p>Incident management is responsible for managing the lifecycle of all incidents <i>Source ITIL®</i></p> <p>The primary objectives of incident management are to:</p> <ul style="list-style-type: none"> <li>• Restore normal service operation as quickly as possible</li> <li>• Minimize the adverse impact on business operations</li> <li>• Ensure the best possible levels of service quality</li> <li>• Ensure the best possible levels of availability are maintained</li> </ul>
	5.2.4 Describe the options for the logging, management, and resolution of incidents	<p>Incidents may be diagnosed and resolved by many different groups, all groups need to understand the process and how they contribute to value, outcomes, costs and risks of services provided.</p> <p>Ways incidents may be resolved include:</p> <ul style="list-style-type: none"> <li>• Some incidents may be resolved by users via self help</li> <li>• Some incidents may be resolved by the service desk</li> <li>• More complex incidents may be escalated to an appropriate support team for resolution</li> <li>• Incidents may be escalated to suppliers or partners</li> <li>• The most complex incidents and all major incidents may require a temporary team to work together to identify the resolution</li> <li>• In extreme cases disaster recovery plans may need to be invoked to resolve an incident</li> </ul>

## 5. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>5.2.5 Identify the technologies which aid the service desk in incident management</p>	<p>Technologies which aid in incident resolution include:</p> <ul style="list-style-type: none"> <li>• Intelligent telephony systems</li> <li>• Workflow systems for routing and escalation</li> <li>• Workforce management and resource planning systems</li> <li>• Knowledge base(s)</li> <li>• Call recording and quality control</li> <li>• Remote access tools</li> <li>• Dashboard and monitoring tools</li> <li>• Configuration management solutions</li> </ul>
	<p>5.2.6 Identify common measures of success for incident management</p>	<p>Common measures of success for incident management include:</p> <ul style="list-style-type: none"> <li>• Increase in the percentage of incidents resolved at first contact</li> <li>• Increase in the percentage of incidents resolved within Service Level Agreements</li> <li>• Reduction in the average time to resolve incidents not resolved on first contact</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.2.7 Explain the service desk responsibilities in incident management	<p>The service desk responsibilities in incident management include:</p> <ul style="list-style-type: none"> <li>• Provide a single point of contact (SPOC)</li> <li>• Own incidents</li> <li>• Resolve incidents at first point of contact</li> <li>• Escalate incidents when required</li> <li>• Facilitate fast resolutions</li> <li>• Track, monitor and chase incident progress</li> <li>• Provide timely status updates</li> <li>• Provide service performance information</li> <li>• Provide data for problem management</li> </ul>
5.3 Service Request Management	5.3.1 Describe the purpose of service request management	The purpose of service request management is to support the agreed quality of a service by handling all pre-defined, user-initiated service requests in an effective and user-friendly manner
	5.3.2 Describe a service request.	A service request is a request from a user or user's authorized representative that initiates a service action which has been agreed as a normal part of service delivery

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Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.3.3 Explain the objectives of service request management	<p>The objectives of service request management are to:</p> <ul style="list-style-type: none"> <li>• Provide a channel for customers to request and receive services</li> <li>• Offer standard services for which a pre-defined approval and qualification process exists</li> <li>• Provide information to customers about the availability of services and the procedure for obtaining them</li> <li>• Source and deliver the components of requested standard services - e.g. licenses and software media</li> <li>• Assist with general information, suggestions, complaints, or comments</li> </ul>
	5.3.4 Explain the different types of service requests	<p>Service requests may include one or more of the following:</p> <ul style="list-style-type: none"> <li>• A request for a service delivery action (e.g. report generation, consumable replacements)</li> <li>• A request for information</li> <li>• A request for resource provision</li> <li>• A request for access to a resource or a service</li> <li>• Feedback, compliments, complaints, and suggestions</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.3.5 Describe the guidelines for successful service request management	<p>For service requests to be handled successfully, the following guidelines should be followed:</p> <ul style="list-style-type: none"> <li>• Fulfilment of requests should be standardized and automated as much as possible</li> <li>• Policies should be established for service requests that can be fulfilled with limited or no additional approval</li> <li>• User expectations with regards to fulfilment times should be clearly set and realistic</li> </ul>
	5.3.6 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"> <li>• Increase in the percentage of service requests fulfilled at first contact</li> <li>• Increase in the percentage of service requests fulfilled within Service Level Agreements</li> <li>• Reduction in the average time to fulfil requests that are not fulfilled on first contact</li> </ul>
	5.3.7 Explain the service desk responsibilities in service request management	<p>The service desk responsibilities in service request management include:</p> <ul style="list-style-type: none"> <li>• Provide a single point of contact (SPOC)</li> <li>• Own requests</li> <li>• Fulfil requests at first point of contact</li> <li>• Escalate requests when required</li> <li>• Track, monitor and chase request progress</li> <li>• Provide timely status updates</li> <li>• Provide service performance information</li> <li>• Ensure compliance to approval processes and procedures</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
5.4 Problem Management	5.4.1 Describe 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, and managing workarounds and known errors
	5.4.2 Describe a problem	A problem is a cause, or potential cause of one or more incidents
	5.4.3 Describe a known error	A known error is a problem that has been analyzed but has not yet been resolved
	5.4.4 Explain the objectives of problem management	<p>The objectives of problem management are:</p> <ul style="list-style-type: none"> <li>• Identify and analyze errors in order to minimize their negative impact on the services being provided</li> <li>• Prevent the recurrence of incidents</li> <li>• Minimize the impact of incidents that cannot be prevented</li> <li>• Determine the root cause of incidents and initiate actions to improve or correct the situation</li> </ul>

## 5. Practices, Processes and Procedures

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.4.5 Identify the three phases of problem management	The three phases of problem management are:  Problem Identification: <ul style="list-style-type: none"> <li>• The identification and logging of a problem</li> <li>• Trend analysis of incident records</li>   <li>• Detection of duplicate and recurring issues by users, service desk and IT staff</li> <li>• During major incidents, identifying a risk of recurrence</li> <li>• Analysing information received by suppliers</li> <li>• Analysing information received from internal developers, test teams, and project teams</li> </ul> Problem Control: <ul style="list-style-type: none"> <li>• Analysis of problems</li> <li>• Documenting workarounds</li> <li>• Documenting known errors</li> </ul> Error Control: <ul style="list-style-type: none"> <li>• Identification of potential permanent solutions</li> <li>• Management of known errors</li> <li>• Ongoing assessment of known errors</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.4.6 Identify common measures of success for problem management	Common measures of success for problem management include: <ul style="list-style-type: none"> <li>• Reduction in the number of incidents through effective problem management</li> <li>• Increase in the percentage of incidents resolved at first contact using workarounds identified by problem management</li> <li>• Reduction in average time to resolve incidents using workarounds identified by problem management</li> </ul>
	5.4.7 Explain the service desk's responsibilities in problem management	Although the service desk is not usually responsible for problem management, its responsibilities include: <ul style="list-style-type: none"> <li>• Highlighting recurring incidents with no long-term fix to the appropriate team</li> <li>• Ensuring incident information is accurately captured and recorded in to assist the appropriate team in diagnosing the underlying cause</li> <li>• Work with technical teams to diagnose problems when appropriate</li> <li>• Use known error records and knowledge articles to assist with the fast resolution of recurring or routine incidents until they can be prevented</li> </ul>
5. Change Enablement	5.5.1 Describe the purpose of change enablement	The purpose of change enablement is to maximise the number of successful service and product changes by ensuring that risks have been properly assessed, authorizing changes and managing the change schedule
	5.5.2 Describe a change	A change is an addition, modification, or removal of anything that could have a direct or indirect effect on services



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Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.5.3 Explain the objectives of change enablement	Objectives of change enablement are to: <ul style="list-style-type: none"> <li>• Balance the need to make beneficial changes to create additional value with the need to protect customers and users from adverse effects of changes</li> <li>• Create and maintain a change schedule</li> </ul>
	5.5.4 Identify the three types of change	The three types of change are: Standard Changes: <ul style="list-style-type: none"> <li>• Low risk, pre-authorized changes that are well understood and fully documented, and can be implemented without needing additional authorization</li> </ul> Normal Changes: <ul style="list-style-type: none"> <li>• Changes that need to be scheduled, assessed, and authorized following a process</li> </ul> Emergency Changes: <ul style="list-style-type: none"> <li>• Changes that must be implemented as soon as possible</li> </ul>
	5.5.5 Describe the purpose of a change schedule	The change schedule is used to help plan changes, assist in communication, avoid conflicts, and assign resources.
	5.5.6 Identify common measures of success for change enablement	Common measures of success for change enablement include: <ul style="list-style-type: none"> <li>• Increase in the percentage of successful changes</li> <li>• Reduction in the percentage of incidents caused by changes</li> <li>• Reduction in the number of unplanned changes</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.5.7 Explain the service desk's responsibilities in the change enablement process	<p>The service desk's responsibilities in change enablement are to:</p> <ul style="list-style-type: none"> <li>• Log changes as requested</li> <li>• Participate in the assessment of risk as requested</li> <li>• Be aware of what changes are scheduled in order to identify if they might be the cause of incidents or problems</li> <li>• Appropriately escalate incidents that might be caused by changes</li> <li>• Halt changes that might negatively impact service delivery</li> <li>• Communicate planned system downtime and interruptions to customers</li> </ul>
5.6 Release Management	5.6.1 Describe the purpose of release management	The purpose of release management is to make new and changed services and features available for use
	5.6.2 Describe a release	A version of a service or other configuration item, or a collection of configuration items, that is made available for use
	5.6.3 Explain the objectives of release management	<p>The objectives of release management include:</p> <ul style="list-style-type: none"> <li>• Ensuring releases to services are in line with business expectations</li> <li>• Ensuring all agreed features contained within a release are available to the business</li> <li>• Creating and managing release plans</li> <li>• Ensuring all release components are compatible and provide a seamless user experience</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.6.4 Identify the features of a release	<p>A release may:</p> <ul style="list-style-type: none"> <li>• Comprise many different infrastructure and application components that work together to deliver new or changed functionality, including documentation, training, updated processes or tools or any other required components</li> <li>• Range in size from small with minor feature change to very large incorporating many components</li> <li>• Include a release plan that should specify the exact combination of new and changed components to be made available</li> <li>• Include a release schedule that should be in place to document timings for each release</li> </ul>
5.7 Deployment Management	5.7.1 Describe the purpose of deployment management	The purpose of deployment management is to move new or changed hardware, software, documentation, processes, or any other component to live environments. It may also be involved in deploying components to other environments for testing or staging
	5.7.2 Explain the objectives of deployment management	<p>The objectives of deployment management include:</p> <ul style="list-style-type: none"> <li>• Ensuring that only components from secure locations are deployed</li> <li>• Ensuring deployments are managed in accordance to policy across all environments</li> <li>• Ensuring that correct processes are followed based on deployment type</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.7.3 Identify the different approaches for deployment	<p>Different approaches to deployment include:</p> <p>Phased deployment:</p> <ul style="list-style-type: none"> <li>New or changed components are deployed to just a part of the production environment at a time</li> </ul> <p>Continuous delivery:</p> <ul style="list-style-type: none"> <li>Components are integrated, tested, and deployed when they are needed</li> </ul> <p>Big bang deployment:</p> <ul style="list-style-type: none"> <li>New or changed components are deployed to all targets at the same time</li> </ul> <p>Pull deployment:</p> <ul style="list-style-type: none"> <li>New or changed software is made available in a controlled repository, enabling download by users when they choose</li> </ul>
5.8 IT Asset Management	5.8.1 Describe the purpose of IT asset management	The purpose of IT asset management is to plan and manage the full lifecycle of all IT assets to help the organization maximise value, control costs, manage risks, support decision making about purchase, re-use, retirement and disposal of assets and to meet regulatory and contractual requirements
	5.8.2 Describe an IT asset	An IT asset is any financially valuable component that can contribute to the delivery of an IT product or service

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.8.3 Explain the objectives of IT asset management	<p>The objectives of IT asset management include:</p> <ul style="list-style-type: none"> <li>• Ensuring that assets are visible to relevant stakeholders</li> <li>• Creating and managing the asset register</li> <li>• Managing the full lifecycle of all assets</li> <li>• Maintaining accurate software license information</li> <li>• Assisting with identification and management of the costs of cloud-based services</li> </ul>
	5.8.4 Identify the types of asset management	<p>Asset management is a well-established practice that includes the acquisition, operation, care, and disposal of organizational assets, particularly critical infrastructure. ITIL recognises that service providers will have a focus on two main types of asset management:</p> <p>IT asset management (ITAM):</p> <ul style="list-style-type: none"> <li>• A sub-set of asset management that is specifically aimed at managing the lifecycles and total costs of IT equipment and infrastructure</li> </ul> <p>Software asset management (SAM):</p> <ul style="list-style-type: none"> <li>• An aspect of IT asset management that is specifically aimed at managing the acquisition, development, release, deployment, maintenance, and eventual removal of software assets. SAM procedures provide effective management, control, and protection of software assets</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.8.5 Describe the typical activities of IT asset management	<p>Typical activities of IT asset management include:</p> <ul style="list-style-type: none"> <li>• Defining, populating, and maintaining an asset register</li> <li>• Controlling the asset lifecycle in conjunction with other practices</li> <li>• Providing current and historical asset data</li> <li>• Auditing assets</li> </ul>
5.9 Service Configuration Management	5.9.1 Describe the purpose of service configuration management	The purpose of service configuration management is to ensure that accurate and reliable information about the configuration of services, and the configuration items (CIs) that support them, is available when and where it is needed. This includes information on how CIs are configured and the relationships between them
	5.9.2 Describe the definition of a configuration item	A configuration item is any component that needs to be managed in order to deliver an IT service
	5.9.3 Describe the definition of a configuration management system	A configuration management system is a set of tools, data, and information used to support service configuration management
	5.9.4 Explain the objectives of service configuration management	<p>The objectives of service configuration management include:</p> <ul style="list-style-type: none"> <li>• Scoping, collecting, and managing information on all relevant components that enable the provision and operation of services and products</li> <li>• Identifying and managing how configuration items have been configured</li> <li>• Identifying the relationships between different configuration items</li> <li>• Creating effective dependency maps and enabling service component criticality mapping</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.9.5 Describe the benefits of processes to service configuration management	Service configuration management needs processes to: <ul style="list-style-type: none"> <li>• Identify new CIs and add them to the CMS</li> <li>• Update configuration data when changes are deployed</li> <li>• Verify configuration records are correct</li> <li>• Audit applications and infrastructure to identify any that are not documented</li> </ul>
5.10 Knowledge management	5.10.1 Describe the purpose of 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
	5.10.2 Explain the objective of knowledge management	The objective of knowledge management is: <ul style="list-style-type: none"> <li>• To ensure stakeholders get the right information, in the proper format, at the right level, and at the correct time, according to their access level and other relevant policies</li> </ul>
	5.10.3 Identify the three categories for knowledge-based assets	Generally intellectual and knowledge-based assets fall into one of three categories:  Explicit: <ul style="list-style-type: none"> <li>• Includes assets, such as business plans, policies, processes, procedures, solutions and customer advice, research material or anything that can be documented, archived, or codified</li> </ul> Tacit: <ul style="list-style-type: none"> <li>• The know-how contained in people's heads</li> </ul> Intuitive: <ul style="list-style-type: none"> <li>• Predicts the probability of the success of several relevant knowledge resolution solutions</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.10.4 Describe the challenges to effective knowledge management	Effective knowledge management has several challenges, such as: <ul style="list-style-type: none"> <li>• Knowledge can be difficult to identify and manage</li> <li>• Knowledge is ever evolving and shifting</li> </ul>
	5.10.5 Describe the difference between information and knowledge	Knowledge is the use of information in a particular context
	5.10.6 Identify common measures of success for knowledge management	Common measures of success for knowledge management include: <ul style="list-style-type: none"> <li>• Increase in the number of incidents and requests resolved at first contact using knowledge articles</li> <li>• Reduction in the number of incidents or service requests requiring functional escalation</li> <li>• Reduction in the number of inbound interactions for simple queries</li> </ul>
5.11 Information Security Management	5.11.1 Describe 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. This includes understanding and managing risks to the confidentiality, integrity, and availability of information, as well as other aspects of information security such as authentication, and non-repudiation



**5. Practices, Processes and Procedures**

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>5.11.2 Explain the objectives of information security management</p>	<p>The objectives of information security management are:</p> <p>Prevention:</p> <ul style="list-style-type: none"> <li>• Ensuring that security incidents do not occur</li> </ul> <p>Detection:</p> <ul style="list-style-type: none"> <li>• Rapidly and reliably detecting incidents that cannot be prevented</li> </ul> <p>Correction:</p> <ul style="list-style-type: none"> <li>• Recovering from incidents after they are detected</li> </ul>
	<p>5.11.3 Identify processes and procedures required to support information security management</p>	<p>There are many processes and procedures required to support information security management, the primary ones are:</p> <ul style="list-style-type: none"> <li>• An information security incident management process</li> <li>• A risk management process</li> <li>• A control review and audit process</li> <li>• An identity and access management process</li> <li>• Event management</li> <li>• Procedures for penetration testing, vulnerability, scanning etc</li> <li>• Procedures for managing information security related changes</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.11.4 Identify potential security threads 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"> <li>• Phishing schemes</li> <li>• Social engineering</li> <li>• Unsecure IT devices</li> <li>• Data Leakage</li> <li>• Hacking</li> <li>• Outdated hardware and software</li> <li>• Shadow IT</li> </ul>
5.12 Service Continuity Management	5.12.1 Describe the purpose of service continuity management	The purpose of service continuity management is to ensure that the availability and performance of a service are maintained at sufficient levels in case of a disaster
	5.12.2 Explain the objectives of service continuity management	<p>The objectives of service continuity management are to:</p> <ul style="list-style-type: none"> <li>• Provide a framework for building organizational resilience</li> <li>• Provide the capability of producing an effective response to a disaster</li> <li>• Safeguard the interests of key stakeholders and the organization's reputation, brand, and value creating activities</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.12.3 Describe key definitions used in service continuity management	<p>Key definitions used in service continuity management are:</p> <p>Recovery Time Objective (RTO):</p> <ul style="list-style-type: none"> <li>The maximum acceptable time following a disruption that can elapse before the lack of business functionality severely impacts the organization</li> </ul> <p>Recovery Point Objective (RPO):</p> <ul style="list-style-type: none"> <li>The restore point of information used by an activity</li> </ul> <p>Disaster recovery plans:</p> <ul style="list-style-type: none"> <li>A set of plans which define how an organization will recover in the event of a disaster</li> </ul> <p>Business Impact Analysis (BIA):</p> <ul style="list-style-type: none"> <li>The identification of vital business functions (VBFs) and their dependencies</li> </ul>
5.13 Service Level Management	5.13.1 Describe the purpose service level management	The purpose of service level management is to set clear business-based targets for service levels, and to ensure that delivery of services is properly assessed, monitored, and managed against these targets
	5.13.2 Explain the definitions of a Service Level	A service level is one or more metrics that define expected or achieved service quality
	5.13.3 Explain the definition of a Service Level Agreement	A service level agreement is a documented agreement between a service provider and a customer that identifies both services required and the expected level of service

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Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.13.4 Explain the objectives of service level management	<p>The objectives of service level management are to:</p> <ul style="list-style-type: none"> <li>Establish a shared view of the services and target service levels with customers</li> <li>Ensure the organization meets the defined service levels through the collection, analysis, storage and reporting of the relevant metrics for the identified services</li> <li>Perform service reviews to ensure the current set of services continues to meet the needs of the organization and its customers</li> <li>Capture and report on service issues including performance against defined service levels</li> </ul>
	5.13.5 Describe the key elements for successful service level agreements	<p>Successful service level agreements must:</p> <ul style="list-style-type: none"> <li>Be related to a defined service in the service catalogue</li> <li>Relate to defined outcomes and not just operational metrics</li> <li>They should reflect a true agreement between the provider and consumer</li> <li>They must be simply written and easy to understand for all parties</li> </ul>
	5.13.6 Explain the difference between operational and business metrics	<p>Operational metrics are:</p> <ul style="list-style-type: none"> <li>Low level indicators of operational activity</li> </ul> <p>Business metrics are:</p> <ul style="list-style-type: none"> <li>Used by any business activity that is deemed useful or valuable by the customer and used to gauge success of a service</li> </ul>
5.14 Service Catalogue Management	5.14.1 Describe the purpose of service catalogue management	The purpose of service catalogue management is to provide a single source of information on all services and service offerings, and to ensure that it is available to the relevant audience

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.14.2 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
	5.14.3 Explain the objectives of service catalogue management	The objectives of service catalogue management are to: <ul style="list-style-type: none"> <li>• Provide consistent information about agreed services</li> <li>• Ensure that the catalogue is produced and maintained</li> <li>• Ensure that the catalogue contains accurate information about status, interfaces and other dependencies for all operational services and for those being prepared for operation</li> </ul>
	5.14.4 Describe the three views of the service catalogue	The three views of the service catalogue are: User View: <ul style="list-style-type: none"> <li>• Information on service offerings that can be requested and provisioning details</li> </ul> Customer view <ul style="list-style-type: none"> <li>• Service level, financial, and service performance data</li> </ul> IT to IT customer view: <ul style="list-style-type: none"> <li>• Technical, security, and process information for service delivery</li> </ul>
	5.14.5 Explain the definition of a request catalogue	A request catalogue provides details on service requests for existing and new service
5.15 Quality Assurance Program	5.15.1 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

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.15.2 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"> <li>• Document an ongoing IT service quality program</li> <li>• Agree the quality initiatives used as part of IT service delivery with customers</li> <li>• Continually improve the quality and cost effectiveness of IT services</li> <li>• Address IT service performance that is not meeting expectations</li> <li>• Produce options and recommendations for improvement and to implement and review them</li> </ul>
	5.15.3 Identify common quality assurance practices	<p>Common quality assurance practices include:</p> <ul style="list-style-type: none"> <li>• Customer feedback</li> <li>• Incident monitoring</li> <li>• Interaction monitoring</li> <li>• Call monitoring</li> <li>• Benchmarking</li> <li>• Employee surveys</li> <li>• KPI monitoring</li> <li>• Focus groups</li> <li>• Skill testing</li> <li>• Knowledge usage monitoring</li> <li>• Account management reviews</li> <li>• Coaching</li> <li>• Mentoring</li> <li>• One-to-ones</li> </ul>

**5. Practices, Processes and Procedures**

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.15.4 Describe interaction monitoring	Interaction monitoring involves monitoring all communications with the service desk from all communications channels used
	5.15.5 Give examples of methods used for interaction monitoring	Examples of methods for monitoring interactions include: <ul style="list-style-type: none"> <li>• Regular reviews of incident and service request logs</li> <li>• Regular reviews of audit trails from every communication channel used</li> </ul>
	5.15.6 List the benefits of incident and service request monitoring	The benefits of incident and service request monitoring include: <ul style="list-style-type: none"> <li>• A seamless end-to-end incident and service request management procedure is developed</li> <li>• Quality and service assurance for customers and the service desk is maintained</li> <li>• The service desk is able to proactively address situations</li> <li>• Incidents and service requests can be reviewed with analysts to develop self-improvement</li> <li>• Opportunities for ongoing improvement are identified</li> <li>• Training needs are identified</li> </ul>

5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.15.7 Give examples of methods used for incident and service request monitoring	<p>Methods used for monitoring incidents and service requests include:</p> <ul style="list-style-type: none"> <li>• Review documentation for completeness and accuracy</li> <li>• Conduct a review with the analyst after the incident or service request is closed</li> <li>• Follow-up calls</li> <li>• Customer satisfaction surveys</li> <li>• Incident/service request tracking</li> <li>• Service level tracking</li> <li>• Automatic escalation within the IT service management system</li> </ul>
	5.15.8 List the benefits of call monitoring	<p>The benefits of call monitoring include:</p> <ul style="list-style-type: none"> <li>• Adherence to the call handling procedure is ensured</li> <li>• Consistency in call management is verified</li> <li>• Areas where processes and procedures are not meeting expectations or are not being followed are identified</li> <li>• Feedback to staff about job performance can be provided</li> <li>• The strengths and weaknesses of individuals and the team are identified</li> <li>• Training needs and opportunities for coaching are identified</li> <li>• Opportunities for continual improvement are identified</li> </ul>



5. Practices, Processes and Procedures		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.15.9 Identify methods for call monitoring	<p>Methods for monitoring calls include:</p> <p>Live service observations:</p> <ul style="list-style-type: none"> <li>• Reviewer sits with an analyst and listens to the call</li> </ul> <p>Remote service observations:</p> <ul style="list-style-type: none"> <li>• Reviewer listens to the calls live but the analyst is not aware the calls is being evaluated</li> </ul> <p>Call recordings:</p> <ul style="list-style-type: none"> <li>• Reviewer listens back to recordings and evaluates calls after they have taken place</li> </ul>
	5.15.10 Describe the role of benchmarking in a service desk environment	<p>The role of benchmarking in a service desk environment:</p> <ul style="list-style-type: none"> <li>• Provides an understanding of the relative differences and similarities between participating service desks in order to acquire a comparative evaluation of service desk performance</li> <li>• Used to provide meaningful and readily implemented improvement recommendations</li> </ul>
	5.15.11 Describe the benefits of benchmarking	<p>The benefits of benchmarking include:</p> <ul style="list-style-type: none"> <li>• An awareness of service desk best practices is developed</li> <li>• Alternative service offerings are identified and understood</li> <li>• Areas requiring service improvement are identified</li> <li>• Improvements and value are demonstrated</li> </ul>

**5. Practices, Processes and Procedures**

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	5.15.12 Recognize the issues to be considered when benchmarking	Issues to be considered when benchmarking include: <ul style="list-style-type: none"> <li>• The use of collaborative approaches and reliable metrics that enable consistent data collection and true peer group comparisons</li> <li>• That there are two types of benchmarking:                             <ul style="list-style-type: none"> <li>○ Industry benchmarking (dissimilar demographics)</li> <li>○ Peer group benchmarking (similar demographics)</li> </ul> </li> <li>• How questions are interpreted or answered by other participants of the exercise</li> <li>• The differing goals and objectives of participating organizations</li> <li>• The differing skill sets based on business needs</li> <li>• The different resources used by the participating organizations</li> <li>• Benchmarking might be considered a panacea</li> <li>• Relevant data must be accurately captured and viewed in context</li> </ul>

## 6. Management Information and Performance Results

Topic	Competency	Range of knowledge and understanding (not exhaustive)
6.1 Managing the Customer Experience	6.1.1 Describe the typical experience that customers expect	<p>Typically, customers expect:</p> <ul style="list-style-type: none"> <li>• Their issues to be resolved within the agreed timeframe</li> <li>• Consistent and courteous service</li> <li>• The service desk to take ownership of and be responsible and accountable for their query</li> <li>• For their expectations to be managed in a professional manner</li> <li>• Timely information and advice about deviations from agreed action plans</li> <li>• Standard business language to be used not</li> <li>• To be provided with good feedback and data to aid decision making data</li> <li>• An opportunity to provide feedback about the service delivered</li> <li>• Value for money</li> </ul>
	6.1.2 Identify the purpose of obtaining and recording feedback	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

## 6. Management Information and Performance Results

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	6.1.3 Identify the various opportunities for obtaining feedback	<p>Various opportunities for obtaining customer feedback include:</p> <ul style="list-style-type: none"> <li>• Customer complaints</li> <li>• Customer surveys</li> <li>• Compliments</li> <li>• Suggestions</li> <li>• Account management / service review meetings</li> <li>• Focus groups</li> <li>• Floor walking</li> <li>• Social media</li> <li>• Service desk participation in the organization's initiatives</li> <li>• Road shows</li> </ul>
	6.1.4 Describe the procedure for responding to feedback	<p>The procedure for responding to feedback is to:</p> <ul style="list-style-type: none"> <li>• Record</li> <li>• Assign ownership</li> <li>• Identify action required</li> <li>• Take appropriate action</li> <li>• Respond within the agreed timeframe</li> <li>• Trend and report</li> </ul>
	6.1.5 Explain the purpose conducting satisfaction surveys	<p>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</p>

## 6. Management Information and Performance Results

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>6.1.6 Describe the objectives of conducting satisfaction surveys</p>	<p>The objectives of conducting satisfaction surveys include:</p> <ul style="list-style-type: none"> <li>• Identifying what customers feel is important</li> <li>• Identifying and prioritizing areas for improvement</li> <li>• Baselining and trending customer satisfaction</li> <li>• Assisting in developing new products and services based on customer needs</li> <li>• Identifying negative feedback as potential complaints and ensuring they are recorded and investigated as appropriate</li> <li>• Validating the effect of service improvements</li> </ul>
	<p>6.1.7 Identify the common types of customer satisfaction surveys conducted by the service desk</p>	<p>The common types of satisfaction surveys conducted by the service desk are:</p> <ul style="list-style-type: none"> <li>• Ongoing (event)</li> <li>• Annual or periodic</li> <li>• One-time or one-off</li> </ul>
	<p>6.1.8 Identify common types of survey methodologies</p>	<p>Common types of survey methodologies include:</p> <ul style="list-style-type: none"> <li>• Weighted</li> <li>• Net Promoter Score (NPS)</li> <li>• Qualitative</li> <li>• Quantitative</li> </ul>

## 6. Management Information and Performance Results

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>6.1.9 Describe an ongoing or event survey</p>	<p>Ongoing or event surveys:</p> <ul style="list-style-type: none"> <li>• Are conducted as soon as possible after a call, incident or service request is closed</li> <li>• Are typically short and can be completed quickly</li> <li>• Measure the quality of a single interaction or incident</li> <li>• Are used to trend customer satisfaction between annual surveys</li> <li>• Measure the impact of changes in processes, products, or services</li> <li>• Have delivery options</li> <li>• Are typically random</li> </ul>
	<p>6.1.10 Describe an annual or periodic survey</p>	<p>Annual or periodic surveys:</p> <ul style="list-style-type: none"> <li>• Are planned and scheduled on a periodic basis (at least annually)</li> <li>• Are typically longer than event-based surveys</li> <li>• Are used to evaluate overall satisfaction levels with the products and services provided by the service desk and the IT organization</li> <li>• Identify changes to products, services, and processes that customers feel would improve their relationship with the service desk and the IT organization and better meet their needs</li> <li>• Are based on customer perception of the service desk and the IT organization over the previous period</li> </ul>

6. Management Information and Performance Results		
Topic	Competency	Range of knowledge and understanding (not exhaustive)
	6.1.11 Describe a one-time or one-off survey	One-time or one-off surveys: <ul style="list-style-type: none"> <li>• Are not scheduled</li> <li>• Are conducted for specific reasons</li> <li>• Are appropriate for evaluating satisfaction levels with current product and service offerings, or for identifying changes that customers feel are important</li> </ul>
	6.1.12 Explain how feedback is used effectively	The effective use of feedback includes: <ul style="list-style-type: none"> <li>• Capturing demand and feeding it into continual improvement initiatives</li> <li>• Identifying opportunities to improve the customer experience</li> <li>• Providing valuable data that aids decision making</li> <li>• Informing stakeholders about the results of feedback and the resulting decisions and actions</li> </ul>
6.2 Management Information & Metrics	6.2.1 Explain the difference between critical success factors, key performance indicators and metrics	Critical success factors: <ul style="list-style-type: none"> <li>• Define the strategic elements necessary for an organization, project, or process to achieve its mission</li> </ul> Key performance indicators: <ul style="list-style-type: none"> <li>• Commonly used to help an organization control and evaluate its progress toward achieving its critical success factors and goals</li> </ul> Metrics: <ul style="list-style-type: none"> <li>• Standards of measurement by which improvements in efficiency, performance, progress, or the quality of a plan, process, or product can be assessed</li> </ul>

## 6. Management Information and Performance Results

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>6.2.2 Identify some of the service desk's critical success factors</p>	<p>The service desk's critical success factors should underpin the organization's stated outcomes. Examples include:</p> <ul style="list-style-type: none"> <li>• Correctly skilled analysts to meet demand</li> <li>• Effective and integrated service management processes</li> <li>• Having the appropriate level of resources in place to meet agreed service levels and desired operational quality</li> <li>• Able to operate within budget</li> </ul>
	<p>6.2.3 Identify some of the service desk's key performance indicators</p>	<p>Examples of service desk key performance indicators (KPIs) include:</p> <ul style="list-style-type: none"> <li>• First contact resolution</li> <li>• First level resolution</li> <li>• Abandon rate</li> <li>• Incidents resolved within SLA</li> <li>• Correctly assigned escalations</li> <li>• Staff turnover</li> <li>• Customer satisfaction</li> <li>• Employee satisfaction</li> </ul>



## 6. Management Information and Performance Results

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	6.2.4 Describe some uses for service desk metrics	Some of the uses of service desk metrics include: <ul style="list-style-type: none"><li>• Identify required resources for staffing and scheduling</li><li>• Measure analyst performance</li><li>• Measure service desk performance</li><li>• Assess the level of customer satisfaction</li><li>• Establish operational effectiveness - e.g. measuring the success of a practice, process, or procedure</li><li>• Demonstrate that business outcomes are achieved</li><li>• Identify areas for inclusion in the continual improvement plan</li><li>• Support management decision making</li></ul>

**6. Management Information and Performance Results**

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	<p>6.2.5 Identify some of the common service management metrics measured by the service desk</p>	<p>Examples of common service management metrics measured by the service desk include:</p> <ul style="list-style-type: none"> <li>• Number of interactions</li> <li>• Number and percentage of interactions by channel</li> <li>• Percentage of first contact resolution</li> <li>• Incident resolution time</li> <li>• Service request fulfilment time</li> <li>• Average time to respond</li> <li>• Percentage of abandoned calls and interactions not responded to</li> <li>• Average time to resolve by priority</li> <li>• Average time to resolve by category</li> <li>• Percentage of open incidents by age</li> <li>• Percentage of reopened incidents</li> <li>• Percentage of hierarchic escalations</li> <li>• Percentage of functional escalations</li> <li>• Percentage of interactions resolved within the service level agreement (SLA)</li> <li>• Percentage of interactions using self-help</li> <li>• Total cost of ownership</li> <li>• Average cost per interaction by type</li> <li>• Average cost per interaction by channel</li> </ul>

## 6. Management Information and Performance Results

Topic	Competency	Range of knowledge and understanding (not exhaustive)
	6.2.6 Identify some of the common customer satisfaction metrics measured by the service desk	<p>Examples of common customer satisfaction metrics measured by the service desk include:</p> <ul style="list-style-type: none"> <li>• Number and percentage of complaints/negative comments received and outstanding per month</li> <li>• Number of compliments</li> <li>• Number of suggestions received each month</li> <li>• Overall score of event (ongoing) satisfaction surveys returned each month</li> <li>• Overall score of periodic (annual) satisfaction surveys</li> </ul>
	6.2.7 Identify some of the common people satisfaction metrics measured by the service desk	<p>Examples of common employee satisfaction metrics measured by the service desk include:</p> <ul style="list-style-type: none"> <li>• Overall score of the people satisfaction surveys returned</li> <li>• Staff turnover</li> <li>• Employee unplanned absence days</li> </ul>
	6.2.8 Explain the purpose of a balanced scorecard	The purpose of a balanced scorecard is to combine the most important service desk metrics into a single, overall measure of service desk performance appropriate for the organization
	6.2.9 Describe the primary objectives of a balanced scorecard	<p>The primary objectives of a balanced scorecard include:</p> <ul style="list-style-type: none"> <li>• Providing an easy to digest snapshot of overall performance</li> <li>• Providing a mechanism to weight metrics based on their significance</li> </ul>



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