Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

LEARNER GUIDE

Comply with service levels as set out in a Contact Centre Operation

Unit Standard 10313

Level 4 Credits 10

lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects

TABLE OF CONTENTS

PERSONAL INFORMATION

NAME	
CONTACT ADDRESS	
Code	
Telephone (H)	
Telephone (W)	
Cellular	
Learner Number	
Identity Number	

EMPLOYER	

EMPLOYER CONTACT ADDRESS	
Code	
Supervisor Name	
Supervisor Contact Address	
Code	
Telephone (H)	
Telephone (W)	
Cellular	

Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

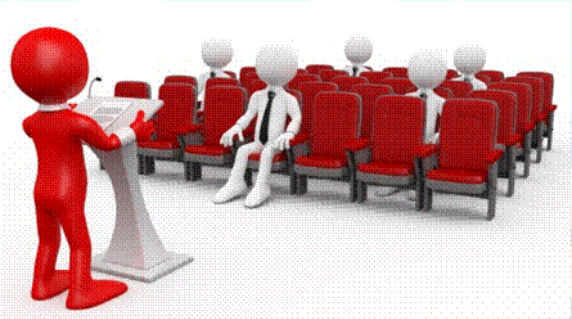
INTRODUCTION

Welcome to the learning programme

Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take notes and share information with your colleagues. Important and relevant information and skills are transferred by sharing!

This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!

Programme methodology



The programme methodology includes facilitator presentations, readings, individual activities, group discussions and skill application exercises.

Know what you want to get out of the programme from the beginning and start applying your new skills immediately. Participate as much as possible so that the learning will be interactive and stimulating.

The following principles were applied in designing the course:

- ✓ Because the course is designed to maximise interactive learning, you are encouraged and required to participate fully during the group exercises
- ✓ As a learner you will be presented with numerous problems and will be required to fully apply your mind to finding solutions to problems before being presented with the course presenter's solutions to the problems
- ✓ Through participation and interaction the learners can learn as much from each other as they do from the course presenter
- ✓ Although learners attending the course may have varied degrees of experience in the subject matter, the course is designed to ensure that all delegates complete the course with the same level of understanding

- ✓ Because reflection forms an important component of adult learning, some learning resources will be followed by a self-assessment which is designed so that the learner will reflect on the material just completed.

This approach to course construction will ensure that learners first apply their minds to finding solutions to problems before the answers are provided, which will then maximise the learning process which is further strengthened by reflecting on the material covered by means of the self-assessments.

Different role players in delivery process

- ✓ Learner
- ✓ Facilitator
- ✓ Assessor
- ✓ Moderator

What Learning Material you should have

This learning material has also been designed to provide the learner with a comprehensive reference guide.

It is important that you take responsibility for your own learning process; this includes taking care of your learner material. You should at all times have the following material with you:

Learner Guide 	***This learner guide is your valuable possession:*** This is your textbook and reference material, which provides you with all the information you will require to meet the exit level outcomes. During contact sessions, your facilitator will use this guide and will facilitate the learning process. During contact sessions a variety of activities will assist you to gain knowledge and skills. Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take and share information with your colleagues. Important and relevant information and skills are transferred by sharing! This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!
Formative Assessment Workbook 	The Formative Assessment Workbook supports the Learner Guide and assists you in applying what you have learnt. The formative assessment workbook contains classroom activities that you have to complete in the classroom, during contact sessions either in groups or individually. You are required to complete all activities in the Formative Assessment Workbook. The facilitator will assist, lead and coach you through the process. These activities ensure that you understand the content of the material and that you get an opportunity to test your understanding.

Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

Different types of activities you can expect

To accommodate your learning preferences, a variety of different types of activities are included in the formative and summative assessments. They will assist you to achieve the outcomes (correct results) and should guide you through the learning process, making learning a positive and pleasant experience.

The table below provides you with more information related to the types of activities.

Types of Activities	***Description***	***Purpose***
Knowledge Activities 	You are required to complete these activities on your own.	These activities normally test your understanding and ability to apply the information.
Skills Application Activities 	You need to complete these activities in the workplace	These activities require you to apply the knowledge and skills gained in the workplace
Natural Occurring Evidence 	You need to collect information and samples of documents from the workplace.	These activities ensure you get the opportunity to learn from experts in the industry. Collecting examples demonstrates how to implement knowledge and skills in a practical way

Learner Administration

Attendance Register

You are required to sign the Attendance Register every day you attend training sessions facilitated by a facilitator.

Programme Evaluation Form

On completion you will be supplied with a "Learning programme Evaluation Form". You are required to evaluate your experience in attending the programme.

Please complete the form at the end of the programme, as this will assist us in improving our service and programme material. Your assistance is highly appreciated.

Assessments

The only way to establish whether a learner is competent and has accomplished the specific outcomes is through the assessment process. Assessment involves collecting and interpreting evidence about the learners' ability to perform a task.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

This programme has been aligned to registered unit standards. You will be assessed against the outcomes as stipulated in the unit standard by completing assessments and by compiling a portfolio of evidence that provides proof of your ability to apply the learning to your work situation.

How will Assessments commence?

Formative Assessments

The assessment process is easy to follow. You will be guided by the Facilitator. Your responsibility is to complete all the activities in the Formative Assessment Workbook and submit it to your facilitator.

Summative Assessments

You will be required to complete a series of summative assessments. The Summative Assessment Guide will assist you in identifying the evidence required for final assessment purposes. You will be required to complete these activities on your own time, using real life projects in your workplace or business environment in preparing evidence for your Portfolio of Evidence. Your Facilitator will provide more details in this regard.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

Learner Support

The responsibility of learning rests with you, so be proactive and ask questions and seek assistance and help from your facilitator, if required.

Please remember that this Skills Programme is based on outcomes based education principles which implies the following:

- ✓ You are responsible for your own learning – make sure you manage your study, research and workplace time effectively.
- ✓ Learning activities are learner driven – make sure you use the Learner Guide and Formative Assessment Workbook in the manner intended, and are familiar with the workplace requirements.

lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects

- ✓ The Facilitator is there to reasonably assist you during contact, practical and workplace time for this programme – make sure that you have his/her contact details.
- ✓ You are responsible for the safekeeping of your completed Formative Assessment Workbook and Workplace Guide
- ✓ If you need assistance please contact your facilitator who will gladly assist you.
- ✓ If you have any special needs please inform the facilitator

Learner Expectations

Please prepare the following information. You will then be asked to introduce yourself to the instructor as well as your fellow learners

Your name:
The organisation you represent:
Your position in organisation:
What do you hope to achieve by attending this course / what are your course expectations?

Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

UNIT STANDARD 10313

Unit Standard Title

Comply with service levels as set out in a Contact Centre Operation

Unit Standard ID

10313

NQF Level

4

Credits

10

Purpose

The qualifying learner is competent of

- ✓ Demonstrating an understanding of company specific service levels
- ✓ Meeting and maintaining service levels

Specific Outcomes and Assessment Criteria

Specific Outcome 1: Demonstrate an understanding of company specific service levels.

Assessment Criteria

- ✓ All relevant service levels are explained
- ✓ The purpose of service levels is described and explained
- ✓ The requirements of all relevant service levels are listed, described and explained

Specific Outcome 2: Meet and maintain service levels.

Assessment Criteria

- ✓ Relevant company specific levels are implemented
- ✓ Implementation processes are monitored to ensure compliance
- ✓ Service level timeframes and targets are consistently met as per company specific requirements
- ✓ Potential constraints in meeting and maintaining service levels are identified and evaluated

Unit Standard Essential Embedded Knowledge

- ✓ A broad understanding of Windows, Word and Excel operating systems
- ✓ An in-depth understanding of product and industry specific knowledge
- ✓ A general understanding of call centre specific service levels
- ✓ A basic understanding of reading and interpreting management information systems

Critical Cross-field Outcomes (CCFO)

- ✓ Work effectively with others in the achievement of service level requirements
- ✓ Organise and manage oneself and activities responsibly and effectively in responding to and achieving service level requirements
- ✓ Collect, analyse, organise and critically evaluate information pertaining to the compliance of service levels
- ✓ Communicate effectively by demonstrating an application of the understanding of relevant service level agreements in relevant medium desired by client
- ✓ Demonstrate an understanding of the world as a set of related systems by recognising the meeting and maintenance of service levels impact on the overall success of the organisation
- ✓ In order to contribute to the full personal development of each learner and the social and economic development of society at large, it must be the intention underlying any programme of learning to make an individual aware of the importance of: developing entrepreneurial opportunities while complying with service levels.

Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

SERVICE LEVELS

Outcome

Demonstrate an understanding of company specific service levels.

Assessment criteria

- ✓ All relevant service levels are explained
- ✓ The purpose of service levels is described and explained
- ✓ The requirements of all relevant service levels are listed, described and explained

Service Level Agreements

A service-level agreement (SLA) is a negotiated agreement between two parties where one is the customer and the other is the service provider. This can be a legally binding formal or informal 'contract'

The SLA is beneficial to both parties as it establishes the scope of the service and support to be offered and the scope of the service and support that can be expected to by the customer. The SLA ensures that no 'arguments' arise about what is covered through the agreement.

1) They know what to expect from you as normal service

2) Their satisfaction can be guaranteed

3) You know how you can exceed their expectations

SLAs are derived directly from the Help Desk Mission Statement.

The main elements of an SLA

SLAs commonly include segments to address: a definition of services; performance measurement; problem management; customer duties; warranties; disaster recovery; termination of agreement. In other words:

- ✓ What the organisation promises to deliver
- ✓ The period of validity of the SLA
- ✓ The site(s) covered by the SLA
- ✓ List of the hardware and software supported (in the case of a Help Desk)
- ✓ List of hardware and software NOT supported (if any - it is best to leave no 'grey areas') in the case of a Help Desk
- ✓ An overview of the levels of support offered (if more than one) such as 'Gold Support', 'Silver Support'...
- ✓ Definitions of priority or severity of the problem with a specified response time for each level
- ✓ Standards of measurement to establish quality
- ✓ Hours of business for the call centre
- ✓ Any provision for out of hours calls
- ✓ Responsibilities of the customer to help fulfill the SLA
- ✓ Any penalties incurred by either party if they fail to fulfill the conditions of the SLA (based upon measurable performance indicators.
- ✓ 'Force majeure' exclusions that permit deviations from the quote response levels (for example, a third party cutting though mains cables).
- ✓ How the customer can contact the call centre for assistance (that is, contact names, pager, telephone, fax numbers, e- mail...)

There is a sample SLA in the appendices.

We may consider that every customer should get the same level of service and they should get all their problems resolved within the same period of time. In reality, however, some customers are more important than others.

In this respect, some customers/departments can be offered different SLA terms according to their needs - or ability/desire to pay!

Service level agreements should be a benefit to both the call centre team and the customer. They should not be written as a barrier to effective support and as a way of 'getting out' of supplier/customer responsibilities.

Call Centre

A ***call centre*** is a centralised office used for the purpose of receiving and transmitting a large volume of requests by telephone.

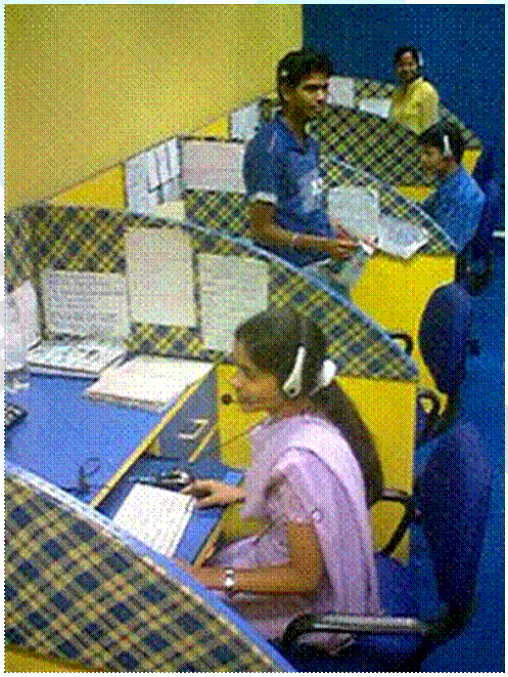
A call centre is operated by a company to administer incoming product support or information inquiries from consumers. These calls are called inbound calls.

Outgoing calls for telemarketing, clientele, product services, and debt collection are also made. These calls are called outbound.

A call centre is often operated through an extensive open workspace for call centre agents, with work stations that include a computer for each agent, a telephone set/headset connected to a telecom switch, and one or more supervisor stations. It can be independently operated or networked with additional centres, often linked to a corporate computer network, including mainframes, microcomputers and LANs. Increasingly, the voice and data pathways into the centre are linked through a set of new technologies called computer telephony integration (CTI).

Most major businesses use call centres to interact with their customers:

- ✓ Large insurance companies have inbound call centres to handle requests and complaints from customers
- ✓ Some retail companies have inbound call centres to handle order that are placed after a TV advertisement
- ✓ Big clothing companies have outbound call centres to collect arrear payments from customers



Types of call centres

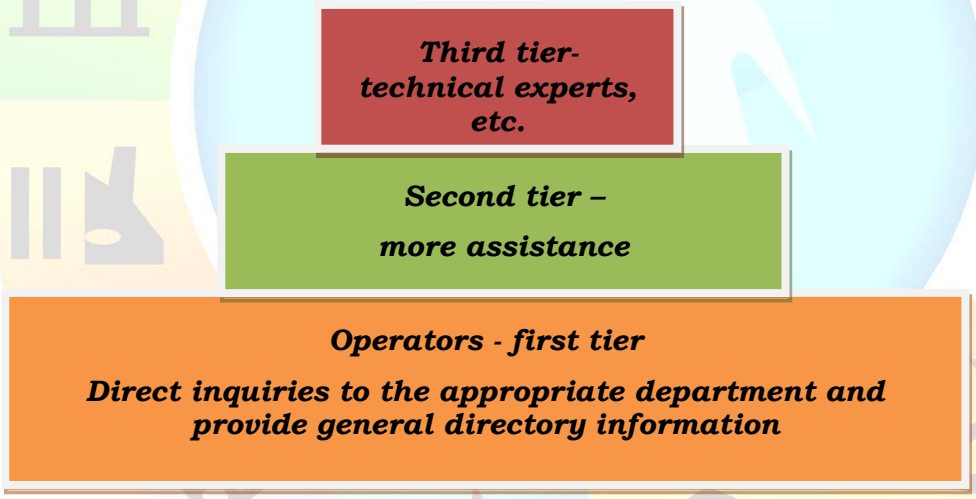
- ✓ Contact centre – Supports interaction with customers over a variety of media, including but not necessarily limited to telephony, e-mail and internet chat.
- ✓ Inbound call centre - Exclusively or predominately handles inbound calls (calls initiated by the customer).
- ✓ Outbound call centre - One in which call centre agents make outbound calls to customers or sales leads.
- ✓ Blended call centre - Combining automatic call distribution for incoming calls with predictive dialling for outbound calls, it makes more efficient use of agent time as each type of agent (inbound or outbound) can handle the overflow of the other.

Types of calls

Types of calls are often divided into outbound and inbound. Inbound calls are calls that are made by the consumer to obtain information, report a malfunction, or ask for help. These calls are substantially different from outbound calls, where agents place calls to potential customers mostly with intentions of selling or service to the individual. It is possible to combine inbound and outbound campaigns, but it is not a common practice.

Call centre staff

Call centre staff are often organised into a multi-tier support system for a more efficient handling of calls. The first tier in such a model consists of operators, who direct inquiries to the appropriate department and provide general directory information. If a caller requires more assistance, the call is forwarded to the second tier, where most issues can be resolved. In some cases, there may be three or more tiers of support staff. If a caller requires more assistance, the caller is forwarded to the third tier of support; typically the third tier of support is formed by product engineers/developers or highly skilled technical support staff of the product.



Alternative titles for a call centre

- ✓ Contact centre
- ✓ Help desk
- ✓ Service desk

Service Desk

A Service Desk is intended to provide a Single Point of Contact ("SPOC") to meet the communications needs of both Users and IT and to satisfy both Customer and IT Provider objectives. ("User" refers to the actual user of the service, while "Customer" refers to the entity that is paying for service)

The objectives of the Service Desk are:

- ✓ Providing a single (informed) point of contact for customers
- ✓ Facilitating the restoration of normal operational service with minimal business impact on the customer within agreed SLA levels and business priorities.

The common Service Desk functions include:

- ✓ Receiving calls, first-line customer liaison
- ✓ Recording and tracking incidents and complaints
- ✓ Keeping customers informed on request status and progress
- ✓ Making an initial assessment of requests, attempting to resolve them or refer them to someone who can
- ✓ Monitoring and escalation procedures relative to the appropriate SLA
- ✓ Identifying problems
- ✓ Closing incidents and confirmation with the customers
- ✓ Coordinating second and third line support

The Service Desk differs from a Call centre, Contact centre or a Help desk by offering a more broad and user-centred approach in order to provide a customer with an informed single point of contact for all of their ICT requirements.

Help Desk

We will use a Help Desk and an SLA that pertains to a Help Desk as examples throughout this course.

A ***help desk*** is an information and assistance resource that troubleshoots problems with computers or similar products.

A typical help desk has several functions. It provides the users a central point to receive help on various computer issues. The help desk typically manages its requests via help desk software, such as an incident tracking system, that allows them to track user requests with a unique ticket number

The user notifies the help desk of his or her issue, and the help desk issues a ticket that has details of the problem. If the first level support technician is able to solve the issue, the ticket is closed and updated with documentation of the solution to allow other help desk technicians to reference in the future. If the issue needs to be escalated, it will be updated, noting what was attempted by the technician and dispatched to second level support.

Evolution of support services

In the Beginning, only programmers and computer operators had access to the computer room and they delivered reports to the 'outside' world. If they had problems, hardware engineers would define the chip that needed changing or software engineers would re-write the program.

As the use of computers in business developed, more and more people were required to make use of them in the course of doing their job. As more and more people began to get a 'terminal' on their desk to access computer resources, the demands on the 'person(s) who understood it' became greater and greater. Often, technical experts in a company would be called upon to provide support to other users in addition to their normal roles.

With the advent of desktop personal computing, and the growing use of 'Office' software products and computerized databases, 'Super Users' or 'Expert Users' became the vogue. 'Expert Users' were people who could officially help out someone who was having problems. However, this support was still provided without a formal framework or training and in addition to their daily job.

As the complexity and scope of computer applications and devices spread in the typical business, the demands on the expert users' time increased, and their support role slowly became a full time job.

As the provision of support became more and more important to the performance of businesses, the concept of the Help Desk was developed and realized

Framework for Support Services

The concept of the Help Desk is to provide a proper framework for the supply of support services to clients. Help Desks can exist within an organization to provide IT or other technical support to the business' employees or to provide support to the business' customers. Alternatively, a business may contract-out the provision of Help Desk services to a third-party.

The framework in which Help Desk operates differs from previous 'models' of support services in the following ways:

- ✓ Well-advertised and recognized point-of-access for clients (telephone number, e-mail contact, website)
- ✓ Documented mission statements, call management procedures, customer service standards and quality assurance
- ✓ Professional support personnel trained in the range of competencies required
- ✓ Use of Information and Communication Technology (ICT) to implement and manage support calls

Responsibilities and Activities of the Help Desk

Some of the responsibilities and activities of the Help Desk are to:

- ✓ Identify and document the customer's needs
- ✓ Manage expectations
- ✓ Answer enquiries
- ✓ Resolve problems
- ✓ Enhance customer relationships
- ✓ Deliver quality customer support consistently
- ✓ Own each call taken to its conclusion

Formative assessment 1

Role of the Help Desk Analyst

The **Help Desk Analyst** performs the basic operations of the Help Desk, processing calls and support requests. As can be seen from the description of the goals of Help Desk and the process of a call, the competencies required of a Help Desk analyst scarcely even start with knowledge of the hardware or software being supported.

To perform well in his/her role, an analyst must demonstrate the following competencies:

- ✓ Customer service techniques (for example, telephone etiquette, dealing with problems, active listening, questioning, assertiveness, empathy and rapport)
- ✓ Effective use of Help Desk technologies
- ✓ Creative thinking, problem-solving and knowledge management
- ✓ Time and process management and prioritization
- ✓ Team working and leadership
- ✓ Use of supported product(s) and related technologies

Other job titles for Help Desk Analyst include Customer Support Professional and Technical Support Professional.

Goal of the Help Desk

An example of a Help Desk's mission statement is:

To provide effective service to every customer by building a personal relationship with each caller, using the appropriate skills, tools and techniques for their requirement and ensuring that each call is either closed or escalated within the agreed timescales by owning each call. This will be assessed by checking with every customer that they are satisfied with the help they have received.

The goal of Help Desk is to maintain the clients' performance at the highest level possible when using the supported technologies.

This goal is enabled by specific objectives, such as:

- ✓ To provide a single point of contact for all customer requirements
- ✓ To provide technical assistance to customers
- ✓ To provide information and support to customers
- ✓ To provide quick, responsive support consistently
- ✓ To prevent recurrence of problems

Standards are maintained by:

- ✓ Professionalism and excellence of Help Desk personnel
- ✓ Effective use of documentation and procedures to manage the support process
- ✓ Effective use of technology in providing support
- ✓ Establishing procedures to ensure quality assurance and customer satisfaction

Formative assessment 2

Role of Other Help Desk Support Professionals

Senior roles within a Help Desk organization include:

- ✓ ***Senior Analyst (or Support Engineer)*** - with the additional responsibility of designing, analysing and improving support services
- ✓ ***Manager*** - responsibility for all Help Desk operations

Systems Administration

The ***Systems Administrator*** is responsible for the reliable provision of computer services to the organization.

Some necessary functions involved in meeting that responsibility include:

- ✓ Installation, maintenance and troubleshooting of ***network and operating system hardware and software***. This includes computers and related peripherals, network devices and printers.
- ✓ Monitoring and management of network ***use*** and allocating and managing available ***resources***. A key component is to identify potential problems and implement a fix (either by upgrading or expanding or by re-allocating resources) before it can impact on end-users.
- ✓ Installation, configuration and maintenance (upgrades and patches) of ***applications software***. The systems administrator may also be called upon to evaluate software and ensure its compatibility with existing systems.
- ✓ Add, remove and configure ***user accounts***. User accounts determine what resources on the network the user is allowed to access. Directories (or folders) can be assigned or restricted to one or more users. Rights to perform tasks (such as configure settings or install applications) can also be assigned or restricted.
- ✓ ***Secure*** resources against ***unauthorized access*** (for example, installation of unlicensed applications, hacking of the computer network or introduction of viruses).
- ✓ Secure resources and data against ***loss, theft or damage***.

Levels of service

The SLA records a common understanding about services, priorities, responsibilities, guarantees and warranties. Each area of service scope should have the 'level of service' defined. The SLA may specify the levels of availability, serviceability, performance, operation, or other attributes of the service such as billing.

The 'level of service' can also be specified as 'target' and 'minimum', which allows customers to informed what to expect (the minimum), whilst providing a measurable (average) target value that shows the level of organisation

performance. In some contracts penalties may be agreed in the case of non-compliance of the SLA (but see 'internal' customers below).It is important to note that the 'agreement' relates to the services the customer receives, and not how the service provider delivers that service.

Service-level agreements are by their nature 'output' based - the result of the service as received by the customer is the subject of the 'agreement'.

Metrics

Service-level agreements can contain numerous service performance metrics with corresponding service level objectives. Metrics are used to measure the performance of the call centre, for example:

- ✓ ***ABA*** (Abandonment Rate): ***Percentage*** of calls abandoned while waiting to be answered.
- ✓ ***ASA*** (Average Speed to Answer): Average ***time*** (usually in seconds) it takes for a call to be answered by the service desk.
- ✓ ***TSF*** (Time Service Factor): ***Percentage*** of calls answered within a definite timeframe, e.g. 80% in 20 seconds.
- ✓ ***FCR*** (First Call Resolution): ***Percentage*** of incoming calls that can be resolved without the use of a callback, or without having the caller call back the helpdesk to finish resolving the case.
- ✓ ***TAT*** (Turn Around Time): Time taken to complete a certain task

Service Standards

Service Standards allow the call centre to define its own ways of working in order to *measure* how effectively the call centre team is conforming to its own levels of customer service quality.

Developing a Service Standard is very simple:

1) Analyse the call centre's main functions

2) Break these goals down into their component 'actions'

3) Analyse how the customer 'fits into' these actions

4) Identify how the action can be done to offer the best level of service to the customer

Service Standards should ***measurable****.*

A Service Standard isn't quite the same as a company procedure although they are pretty close - their main purpose is to instruct how an action may be performed in the best way possible from the customer's point of view.

Most Service Standards are simple, single sentences or paragraphs.

Having developed a framework for developing Service Standards, we can apply this method to other aspects of the call centre's operation, for example:

- ✓ Answering the telephone
- ✓ Customer feedback - Monthly reports sent back to the customer or their support contact.
- ✓ Logging a call
- ✓ Closing a call

Applying Service Standards to the Help Desk

Consider one of the actions needed to operate Help Desk and develop an applicable Service Standard, along the lines of the example below

Answer the phone

Service		***Service Standards***
Phone rings..	The customer is waiting	Answer the phone within three rings
	(developing the standard)	Answer the phone within three rings using the 'Help Desk standard greeting'

Information Management

Information management is the process of collecting and disseminating any information that that can enhance the performance of the Help Desk or affect the job performance of the customer.

Advantages of Effective Information Management

Having a problem library at your disposal can save a great deal of time and money by ensuring that Help Desk staff do not duplicate investigative work that has been undertaken in the past. The library also becomes more useful as time goes by because whilst you may remember the answer to an obscure problem for a few weeks, when the same problem turns up again perhaps two years later it can be very frustrating to know that 'it rings a bell' but not be able to remember the exact solution.

Information management has three main roles:

- ✓ Assist analysts in solving problems
- ✓ Provide the basis for a self help system
- ✓ Improve business practice and procedures within the Help

Desk organisation

The information can be stored in an information base application (usually associated with expert systems and artificial intelligence), however, it is possible to store the information in any database that allows easy retrieval (for example, by associating topics with keywords or by effectively categorizing the data stored).

Developing an effective information base is likely to be expensive. Careful consideration of the benefits to be drawn would have to be made before attempting to implement a fully functional information base application.

Guidelines for Information Management

Distribution

There are a variety of ways to distribute information.

Whatever method, or mix of methods, is adopted, the following criteria should be met:

Make information *available* to *those* who *need it*.

Anyone who has a right to the information and would find it useful should be able to access it easily. Those who should not know should not be able to access it. Those who do not need to know should not be force-fed it.

Make sure that an Information Base is secured, with access limited by user accounts if necessary. Similarly, be careful that mailshots are targeted to appropriate users.

Make new or updated information available as soon as possible. Again, this should be targeted to the appropriate users.

Validation of information

A popular maxim is "Garbage In, Garbage Out". If the information you enter into a information management system is wrong, out-of- date or poorly organised, it will not be of use and may be harmful (especially if the system is used as the basis for self-help).

Information sources and submissions need to be verified for inclusion. A good information management system will have facilities for feedback and updates.

Organizing information

- Keyword 1: Designated as 'Product category'

Hardware - Base unit	Software - Presentation
Hardware - Disk/Floppy	Software - Graphics
Hardware - Modem	Software - Communications
Hardware - Monitor	Software - Database
Hardware - Mouse/Tablet	Software - Network
Hardware - Multimedia	Software - Operating System
Hardware - Network	Software - Other
	Software - Spreadsheet
	Software - Word Processing

If you are using a computerized database then the software itself may already have a 'ready-to-go' database for you to fill in with all the categories in place. If not, you should ensure that any database you set up is organized in a logical manner and that everyone who logs calls does so in a consistent manner. For example, most Information Base databases built into Help Desk software allow entries to be made using three ***keywords***. Such a categorization can also be used with a paper-based system.

- Keyword 2: Designated as 'Manufacturer'

3Com	Epson	Olivetti
3M	Goldstar	Orchid
Agfa	Harvard	Pace
APC	HP	Panasonic
Apple	IBM	Philips
ATI	Logitech	Samsung
Borland	Lotus	Seikosha
Brother	Microsoft	Sharp
BT	Mitac	SMC
Canon	Motorola	Sony
Citizen	NEC	Toshiba
Corel	Novell	Taxan

- Keyword 3: Designated as 'Problem type'

Bug
Failure
Incompatibility

Information Sources

Information can derive from many different formats (books and magazines (paper or online), news and message boards, information databases, feedback, seminars and discussion...

Some examples are listed.

Documentation and Training

Many products come with a variety of documentation, from the vendor, third-party suppliers and users.

Examples include product documentation, online help, training manuals/courses, Frequently Asked Questions (FAQs), technical support, information bases/vendor website, white papers (development plans and notes), testing results, reviews... Contracts and agreements may also provide useful information.

Community

Experts and end-users usually find many ways to share (show off) their information either to supply tricks and tips or to help someone with a specific problem.

Some examples include product launch/marketing/development seminars, training courses, message boards/forums/newsgroups/ discussion lists, FAQs, magazine articles, user websites...

Information Providers

It is possible to buy information. "Shrink-wrapped" information systems may be available for some products. Other types of information may also be available by subscription or for free (for example, translation services).

Feedback

Employees, users and customers can all be valuable sources of new or updated information. Call logs and documentation can be exported into the information management system.

System developers and testers are further examples.

Keeping Skills Up-to-Date

Keeping up-to-date and using the Internet effectively are important qualities of the Help Desk Support Analyst

Ways to keep up-to-date

- ✓ Training - attend courses
- ✓ Gather information from seminars and industry events and industry magazines
- ✓ Talk to others in the industry and join industry related groups

Ways to utilize the internet

- ✓ Use internet search engines to locate topics of interest
- ✓ Join an Internet-based user group or online discussion board or chat rooms
- ✓ Use Computer Based Training
- ✓ Research new support tools
- ✓ Download shareware, upgrades and free "patches" where the company permits
- ✓ Utilize instant messaging to share information and solutions

Call Management Systems

A common name for the software providing CTI services is **Call Management System (CMS)**. As well as providing the "back office" functions described below, a call management system gives the Help Desk operator an integrated user interface for the use of the CTI system. For example, a call management system may provide the following end-user features:

- ✓ Represent the telephone handset and functions on a computer screen
- ✓ Display caller and call details automatically
- ✓ Access information management systems and contact databases
- ✓ Allow calls to be initiated (using telephone, fax or e-mail)
- ✓ Allow broadcast calls (to many recipients) or call conferencing using a variety of media (voice, text messaging, data/application sharing and so on)
- ✓ Provide data analysis and reporting functions
- ✓ Provide an interface for programming customized functions into the system

CTI Components

Automatic Call Distributor (ACD)

An ACD processes each incoming call in a matter of milliseconds, so the process is invisible to the user.

The call distributor can be programmed to ***route*** calls to an appropriate receiver, usually on the basis of the caller's ID, the nature of the support call and the availability of support staff.

Interactive Voice Response Unit (IVR)

The IVR (also referred to as an **Auto Response Unit**) is used to respond to the caller's input, usually using the telephone keypad (though the system can also be voice activated). This can be used (among other things) to perform two important functions:

- ✓ Capture data to identify the user to the system (such as a user ID or job ID or the basic parameters of the request for support)
- ✓ Provide automated support or information to the user

Call Recording/Voice Capture

Voice calls can be captured to a recording system for analysis, training and quality assurance.

At its most sophisticated, voice calls can be automatically analysed using speech recognition to produce Help Desk statistics or processed into an information management system.

Formative assessment 3

Inbound Call Centre

So far, we have discussed call centres and information management from the point of view of a Help Desk and will now briefly discuss a different type of inbound call centre. Imagine you work for a company that takes telephonic orders that are placed as a result of an advertisement on TV.

What would the service levels be for such a service?

Usually at least three levels: operators, second level and then technical experts in order to answer questions that clients may have.

Service levels for this service would also include:

- ✓ Management: how will the operation be managed?
- ✓ Information systems: how will the information be captured on the system and what checks will apply to ensure that information is entered correctly?
- ✓ Information on systems: what system will be used to capture information and track the process of the order from placement to delivery?

- ✓ How will shift changes be managed to ensure that information is not lost and that orders are placed and carried out per the service level agreement?
- ✓ Will new and relevant information be available on the system as well as wall-boards (bulletin boards)?
- ✓ Will information be easily accessible to all users?
- ✓ How will the success of the campaign be measured?
- ✓ How will abandoned calls be measured?

What would the service standards be for such an operation?

- ✓ To answer incoming calls within a certain period of time,
- ✓ To answer client's questions regarding the product adequately or to escalate the enquiry to the next level
- ✓ To take down all relevant details of the client such as payment details (credit card number and expiry date, etc.), delivery address, client contact details, etc.
- ✓ To give client relevant details such as date of delivery, period of guarantees, conditions of guarantees such as walk-in warranty, and so on
- ✓ To have a system where someone from the call centre calls back the next day to confirm the order with the client
- ✓ To record all calls in case of a legal dispute
- ✓ To check validity of client's credit card details to ensure that payment is made

This list is only an example and you will be guided by the procedures in place in your organisation

What knowledge should you have?

In-depth knowledge of the product, availability of supplies, approximate delivery dates, what information you need from the client, in-depth knowledge of the standard operating procedures of your organisation, knowledge of sales procedures and customer service

Formative assessment 4

Outbound Call Centre

If you are employed by a debt-collecting organisation, the work becomes more difficult. Clients are having financial problems to start with, that is why they are not paying their debts and they will definitely be rude and abusive. Situations like this should be handled with tact and patience.

What would the service levels be for such a service?

Usually at least three levels: first operators, second level (usually supervisors) and then technical experts for really difficult clients.

Service levels for this service would also include:

- ✓ Management: how will the operation be managed?
- ✓ Information systems: how will the information be captured on the system and what checks will apply to ensure that information is entered correctly?
- ✓ Information on systems: what system will be used to capture information and track the process of the order from placement to delivery?
- ✓ How will shift changes be managed to ensure that information is not lost and that orders are placed and carried out per the service level agreement?
- ✓ Will new and relevant information be available on the system as well as wall-boards (bulletin boards)?
- ✓ Will information be easily accessible to all users?
- ✓ How will the success of the campaign be measured?
- ✓ How will abandoned calls be measured?

What would the service standards be for such an operation?

- ✓ To obtain a commitment to pay the outstanding amount as soon as possible, called a promise to pay

- ✓ To take down and control all relevant details of the debtor such as physical address, postal address, contact telephone numbers, ID number, etc.
- ✓ To collect the outstanding money in as short a period as is possible, taking into account the ability of the debtor to pay
- ✓ To follow up with debtors regularly to ensure that they make regular payments
- ✓ A system must be in place where debtors' payments will be noted against the outstanding amounts
- ✓ In the case of difficult or abusive debtors to escalate the query to the next level
- ✓ To take legal action against the debtor where required
- ✓ To report to your clients about the amounts of money collected on their behalf
- ✓ To record all calls in case of a legal dispute

This list is only an example and you will be guided by the procedures in place in your organisation

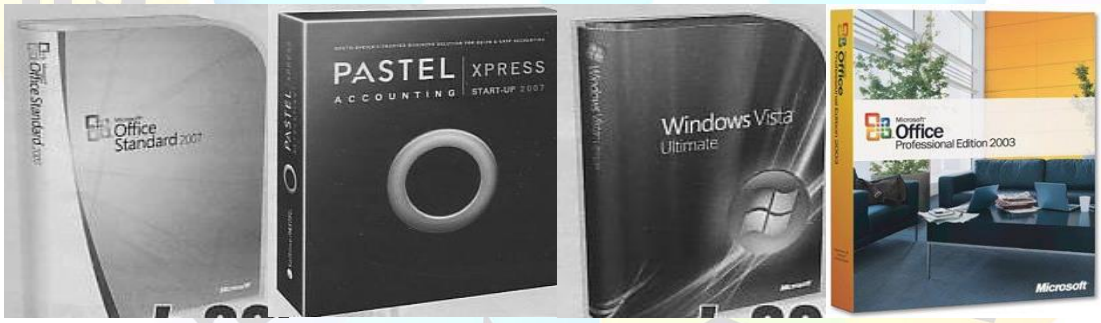
What knowledge should you have?

- ✓ In-depth knowledge of the debt: who is the money owed to, when was the debt incurred, when was the last payment made?
- ✓ In-depth knowledge of legal actions to take if debtor fails to pay as promised, e.g. issue of summons, obtaining of judgement against the debtor, attaching his/her goods in lieu of payment.
- ✓ Knowledge of targets that have to be met.
- ✓ Knowledge of standard operating procedures of the organisation
- ✓ Knowledge of appropriate telephone techniques: how to be firm without being rude, etc.

Computer Operating Systems

Software is a set of electronic instructions that tell a computer what to do.

You cannot see or touch software, but you can see and touch the packaging that software comes in. Hardware is anything you can see and touch, software is loaded onto the computer and stored in the hard drive, so you cannot see or touch it.

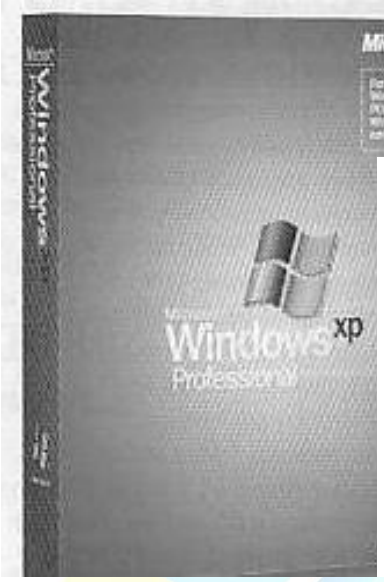


There are two kinds of software: operating software and application software.

Operating System Software

This software controls the overall activity of the computer. Previously, we used MS-DOS software; today most computers come with Windows 98 or Windows 2000. Other examples of operating system software are: Linux and Unix

Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599



Microsoft®
Windows NT®
Windows® 98

Operating System Software is the link between the hardware and the software. It allows the hardware and software to talk to each other. Windows is operating system software. Without it, or some other kind of operating system software, your PC will not work.

The hardware of your computer would be the components described in the previous section: the monitor, the keyboard, the mouse, the CPU, etc.

Microsoft Windows XP is a Personal Computer (PC) **operating system** from Microsoft. An operating system:

- ✓ Provides a **Graphical User Interface** to PC **hardware components** (such as the hard disk, floppy disk, CD-ROM drive, or modem).
- ✓ Allows different **software applications** (word processors such as Microsoft Word or spreadsheets such as Microsoft Excel) to work together in a common environment.
- ✓ Manages the **data files** you create when using applications.

A **Graphical User Interface (GUI)** means that commands are selected from **icons** and **menus** on-screen using the **keyboard** and the **mouse**. Applications run in **windows** on the screen. You can open several windows at once and switch between them, allowing you to use several applications at the same time.

Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

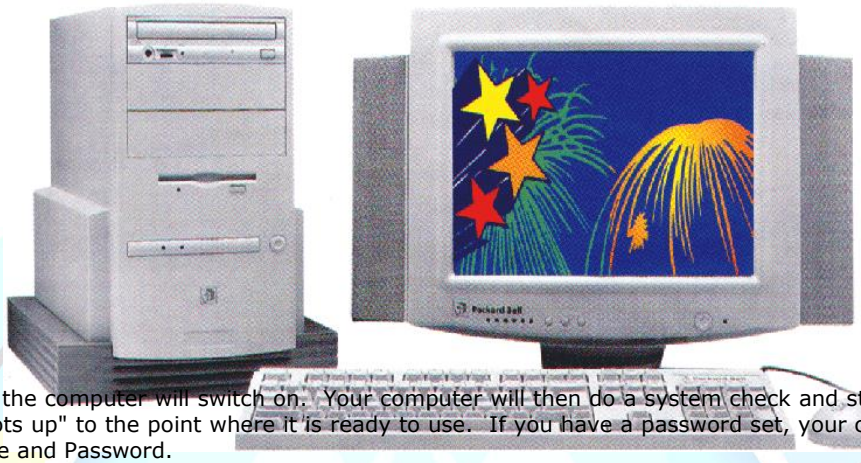
Windows XP comes in two versions. The **Home** version is aimed at domestic users; the **Professional** version is aimed at business users. The **Professional** version contains several extra features, mainly for use in company networks. Otherwise, the two versions share the same features, look, and feel.

Windows XP can be installed on desktop computers and portable laptop (notebook) computers.

Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

Power Up The Computer

When you start up a computer, you need to press the ***power*** button on the computer box.



When you do this, the computer will switch on. Your computer will then do a system check and start-up Windows. The computer "boots up" to the point where it is ready to use. If you have a password set, your computer will ask you for a Username and Password.

Login:

Username:

Pamela

Password:

****

Hint:

Never use a word that exists in any Dictionary as your password. Rather use numbers, letters and special characters like and underscore _, backslash \ and even a space can be put in a password. This way it is harder for a hacker to break into your computer. Usernames and Passwords are sometimes case sensitive, so you should check that you enter your name with a capital if that's the way you entered it when you chose a username.

Once you've entered your username and password, Windows will start-up. There is more than one type of start-up: Cold Start and Warm Start.

Cold Start, Warm Start

- ✓ A cold start takes place when you start your computer in the morning.
- ✓ A warm start is when you select restart in the Shut Down Windows box. The computer will shut itself off and restart itself again.
- ✓ You can also restart your computer manually by selecting Shut down and then restarting after a few minutes.

Errors

The most common errors that you could get are the following:

- ✓ Keyboard not detected
- ✓ Mouse not detected

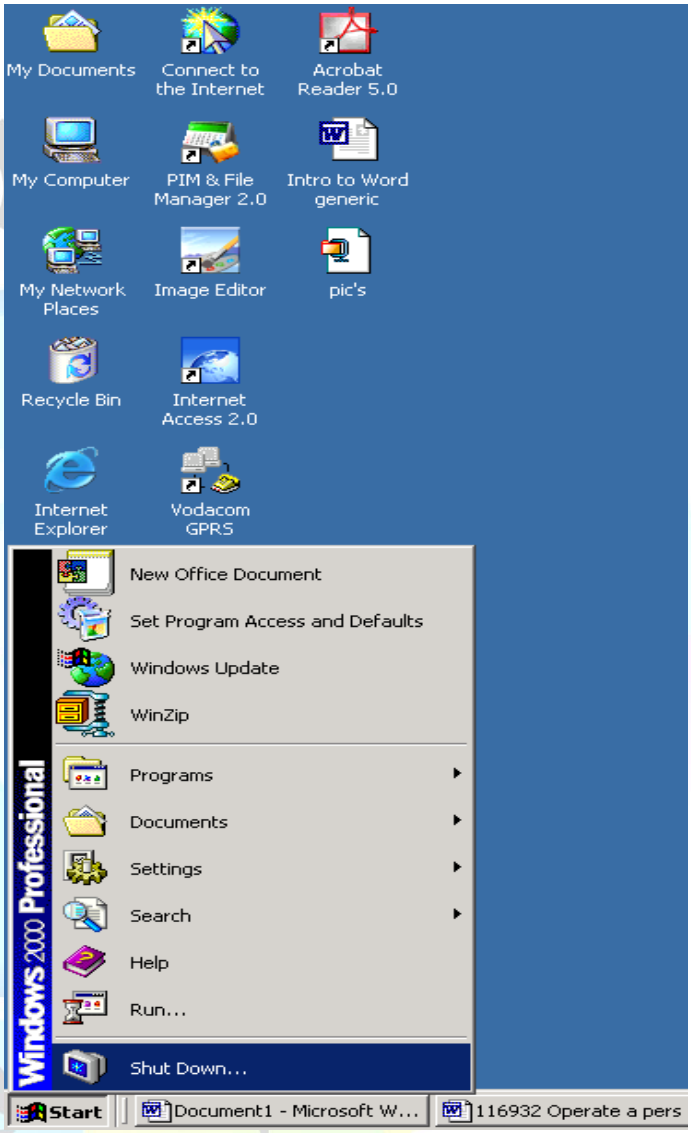
- ✓ No signal input
- ✓ Non-System disk or disk error

To fix the first three errors you need to check that all the cables are plugged into your computer at the back. The No Signal input error would be your screen that is not plugged in properly or not plugged in at all, the same with the keyboard and the mouse.

The Non-System disk error: when there is a stiffy in the computer that interferes with the operating system (Windows) when you switch the computer on.

Shut Down

When you have finished your work, you should close all the programs you were busy with, such as MS Word. Once you have done this you click on the start button, click on Shut Down.



Windows will then ask you what you want to do:

- ✓ Shut Down,
- ✓ Restart or
- ✓ Log off

Shut Down

If you want to ***Shut Down***, (switch the computer off) you should click on Shut Down. Once you clicked on Shut Down, click on ***OK***. The computer should then say Windows is Shutting Down, or Please Wait while Windows Shuts Down.

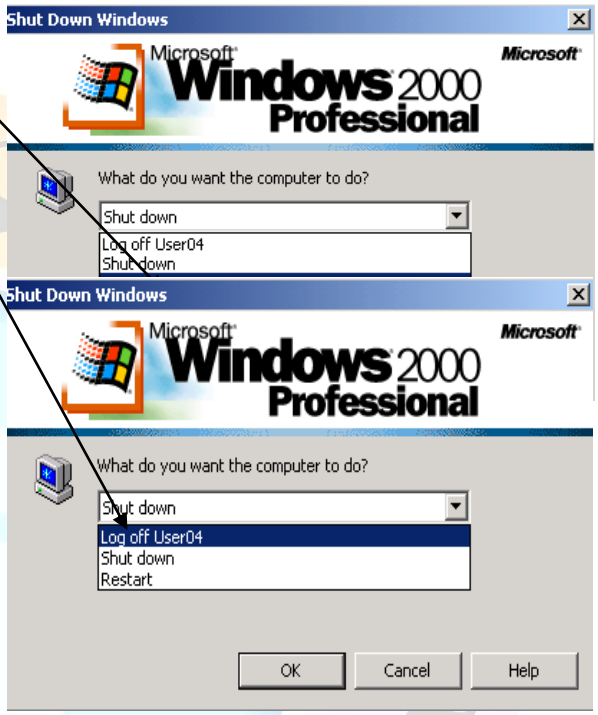
When the command is finished, the computer will tell you: It is now safe to turn your computer off. Then you press the same button you pressed to switch the computer on, the "Power button". Some computers switch off

automatically and you don't have to press the power button.

Restart

If you want the computer to Restart, you should click on ***Restart***. The computer will then switch off and then on again automatically.

Sometimes, restarting your PC will solve problems that you are experiencing with software applications that you are working in.



Log Off

If you have more than one user account on the computer and you want to go to another user account without Shutting Down the computer, you will click on Log off (our account name).

.

Formative Assessment 5

GUI

The definition of GUI is ***G***raphical ***U***ser ***I***nterface, A computer terminal interface, such as Windows, that is based on graphics instead of text. In other words in a program like Windows, the Start button is a button with a picture (graphic) instead of only text. The icons for a CD-Rom, floppy drive or hard drive is also based on GUI rather than just text.

Files

If you look at a filing cabinet, you will see the cabinet with drawers. Inside the drawers, are folders and inside the folders you will find "files" or documents.

A computer is basically the same. ***My Computer*** is like your cabinet, ***My Documents*** is like a drawer in the cabinet.

Folders are like the files inside the drawer and inside the folder you will find ***files*** or documents.

Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

Working With Folders In Windows Explorer

Starting The Windows Explorer

- ✓ Click the ***Start*** button; then choose ***Programs, Windows Explorer***.
- ✓ You can use Windows Explorer to do the following with your files and folders (directories): ***organise; rename; copy; move; delete and otherwise manage the folders and files.***

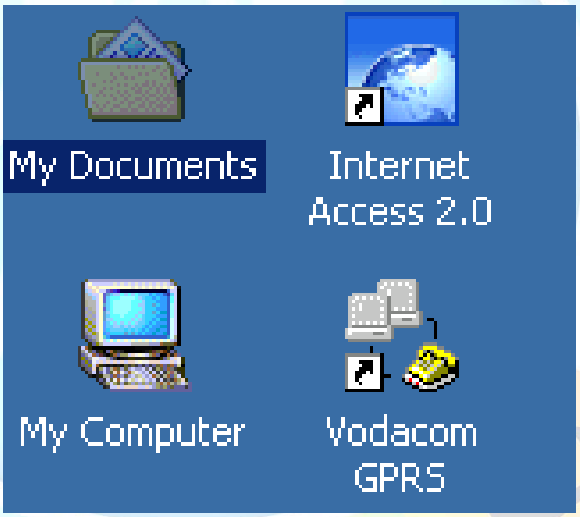
Using The Explorer Window

At the top of the Explorer Window, in the title bar, you will find the ***name of the drive*** whose components you are currently viewing. Locate this now.

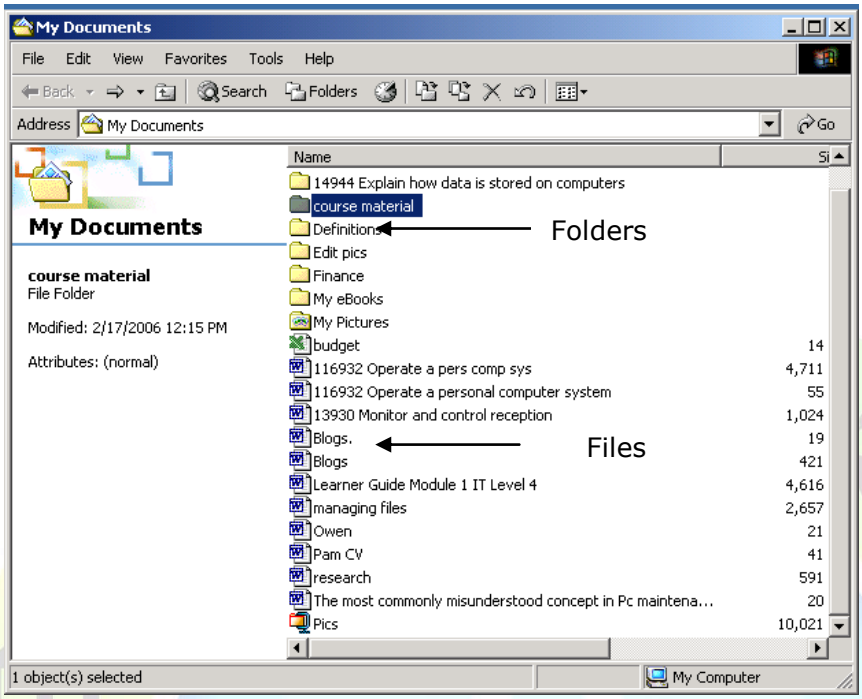
The Explorer Window is also split into ***two panes***. The ***left pane*** displays your hard disk and the folders it contains. The ***right pane*** displays a list of the files, folders and subfolders stored in the selected folder. A subfolder is a folder within another folder, similar to a subdirectory.

Viewing Folders

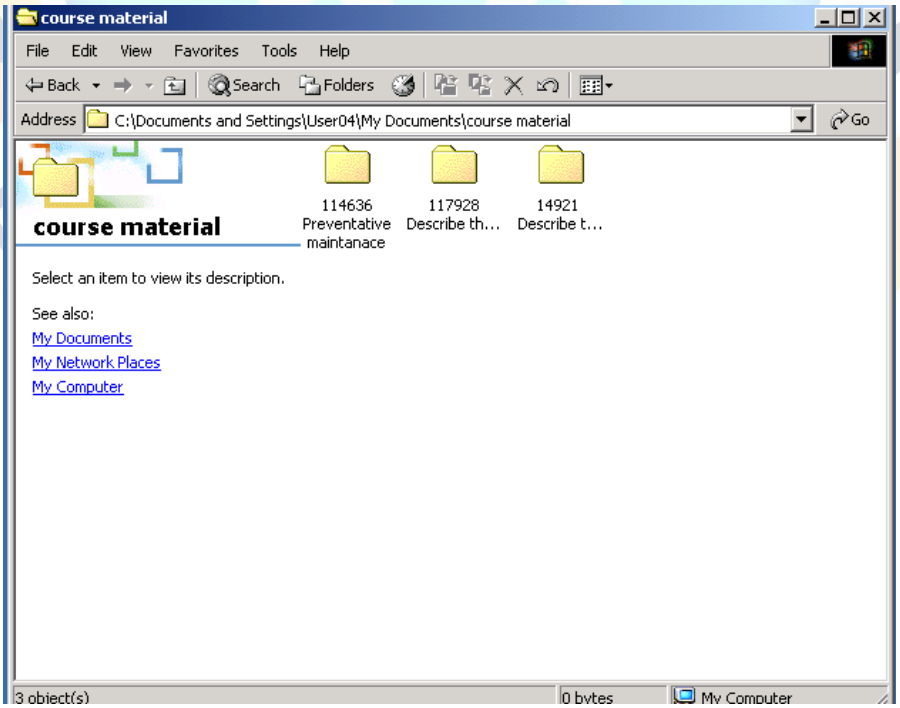
- ✓ To view Folders in My Documents, you need to double click on My Documents on the desktop.
- ✓ This will open My Documents, where you will find all your Files and Folders that you saved in My Documents.



lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects



✓ Folders can be sub-divided into sub folders. In other words you can put a folder inside a folder.



lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects

Viewing Files

- ✓ To view a file, locate it in the right pane in Windows Explorer and double click the file. It will open.
- ✓ Or locate it in My Documents and double-click the file.

Creating A Folder

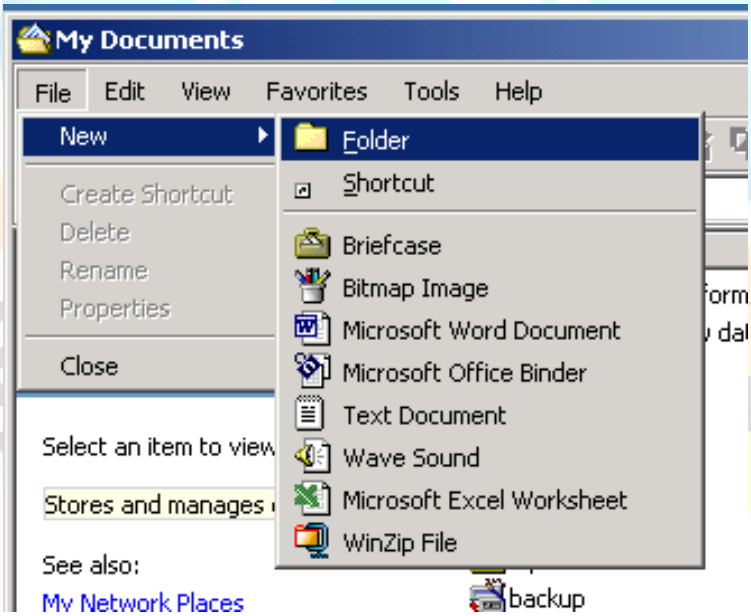
Many folders are created automatically when you install a program. You can then use the application's designated document folders or you can create folders yourself.

For example, you might want to create a folder to hold the following groups of files:

- ✓ Files that you copied from the Internet
- ✓ Subject-related files: e.g. all sales documents or spreadsheet files
- ✓ Application-related files: e.g. all letters to customers
- ✓ Whenever an application does not create its own folder during installation, you would have to open a folder.
- ✓ All files that you will share with other network users.

Create a folder

- ✓ Choose Start, Programs, Windows Explorer
- ✓ In the left pane, select the drive on which you want the new folder located, or select the folder in which you want the new folder located. This is called the parent or root folder of your new folder. The root folder is the same as the drive; in other words C is the root folder of the hard disk. The root folder is also the parent of all folders on that drive. For this exercise, select C drive.
- ✓ Choose File, New and then click Folder. The new folder will appear in the right pane, with the name "New Folder"



Renaming A Folder

Tip	***You must never rename program files with the following extensions: EXE, COM, PIF or BAT.***

Many applications will not work if their files have been renamed. Also, don't rename any files with the INI or DLL extensions; these are configuration files that Windows needs to operate properly. There are examples of these files in Windows Explorer, call the lecturer to show you.

- ✓ In the Explorer, select the folder you just created and choose File, Rename.
- ✓ The folder's name will appear highlighted in a box; type the following name: "New folder – test" and then press enter.
- ✓ Watch how the folder is placed in a new location in the left pane.

Moving Or Copying Files Or Folders

Note	***The copy, move and paste functions of Windows do exactly what they say: Windows makes a copy of the file or it cuts out of the required file and then pastes it in a new location.***

It works as follows: when you ***copy*** a file or folder, the original stays in its place and a copy is sent to the clipboard. This copy will stay on the clipboard until you copy or cut again, or until you switch off your computer. While the copy is on the clipboard, you can paste the file or folder as many times as you like.

Remember now, when you copy the original stays in its place and you can then paste as many copies in new locations as you like.

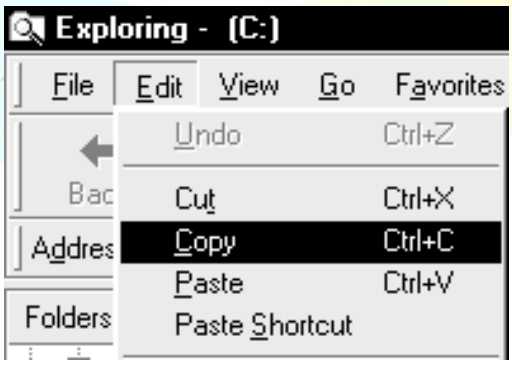
When you ***cut*** a file or folder, it will no longer appear in its original place – you have just cut it out. Windows then sends the file or folder to the clipboard where it remains until you cut or copy again or until you switch off your computer. When you cut a file or folder, you can also paste in new locations as many times as you wish.

Before you begin copying or moving files, remember:

- ✓ When you copy or move a folder, you also copy or move the files and other folders within the folder.
- ✓ If you move application files to another folder, you may have trouble starting the application through the Start, Programs menu. Your best bet is to leave application files in their original locations.

Moving And Copying Files Using The Menus

- ✓ Select the files and/or folders you want to move or copy.
- ✓ Open the Edit menu and select Cut or Copy. The selected items are either moved or copied to the clipboard.
- ✓ In the left pane of the Explorer, select the drive or folder in which you want to move or copy the selected files.
- ✓ Choose the Edit menu and the Paste command. Windows will move or copy the selected files or folders to the new location.

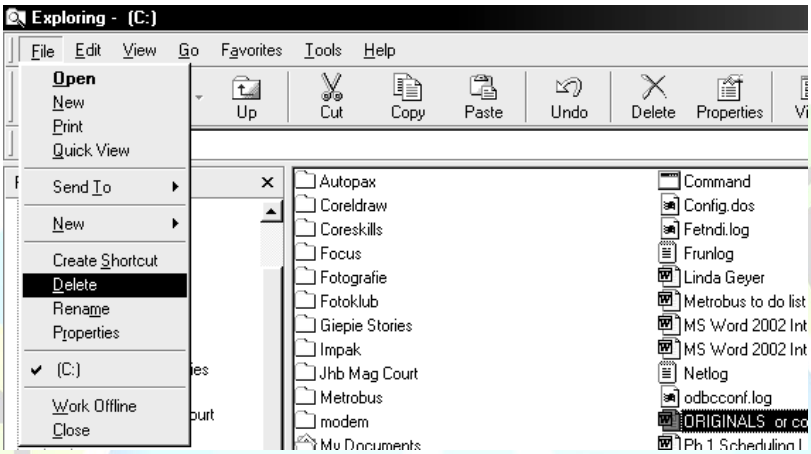


If you attempt to move a file or folder to a location in which a file or folder with the same name exists, Windows will send a message displaying the selected file's as well as the original file's size and creation or modification date. Click Yes to replace the file and No to stop the process.

Deleting A File Or A Folder

When you no longer need a file or a folder or when your disk is getting full or even if you accidentally create a file or a folder, you need to know how to delete a file or folder. Make a back up copy of the file or folder before you delete it in case you need it later.

When you ***delete a file or folder it is moved to the recycle bin*** and if you require more disk space, you will have to empty the recycle bin.



- ✓ In the Explorer, ***select*** the file or folder you want to delete by clicking it. To select multiple files or folders, hold the Ctrl key as you click the file you want to select. Select the folder you just opened and renamed, New folder – test.
- ✓ Choose ***File, Delete*** or press the Delete key. The delete dialogue box appears, asking you to confirm that you want to delete the specified item(s). Do this now.
- ✓ Select Yes and Windows will move the folder to the Recycle Bin.

Recovering Deleted Files From The Bin

You can move files and folders to the Bin and then ***retrieve them again*** before deleting them from the disk. When you recover a file or folder from the Bin, you're really only moving it back to its original drive and folder.

- ✓ In the Explorer, scroll to the bottom of the left pane until you see the Recycle Bin. Click the bin in order to view the files and folders it contains.
- ✓ Select any files or folders you want to recover and choose File, Restore. Windows will then move the selected files and folders back to their original place on your hard drive. Do this with the folder you just deleted and see how it moves back to its old place. Then delete the folder again.

The "Path" (Or Location) Of A File

Each file has a "path" or location name. This will tell you exactly where a file is stored for example:

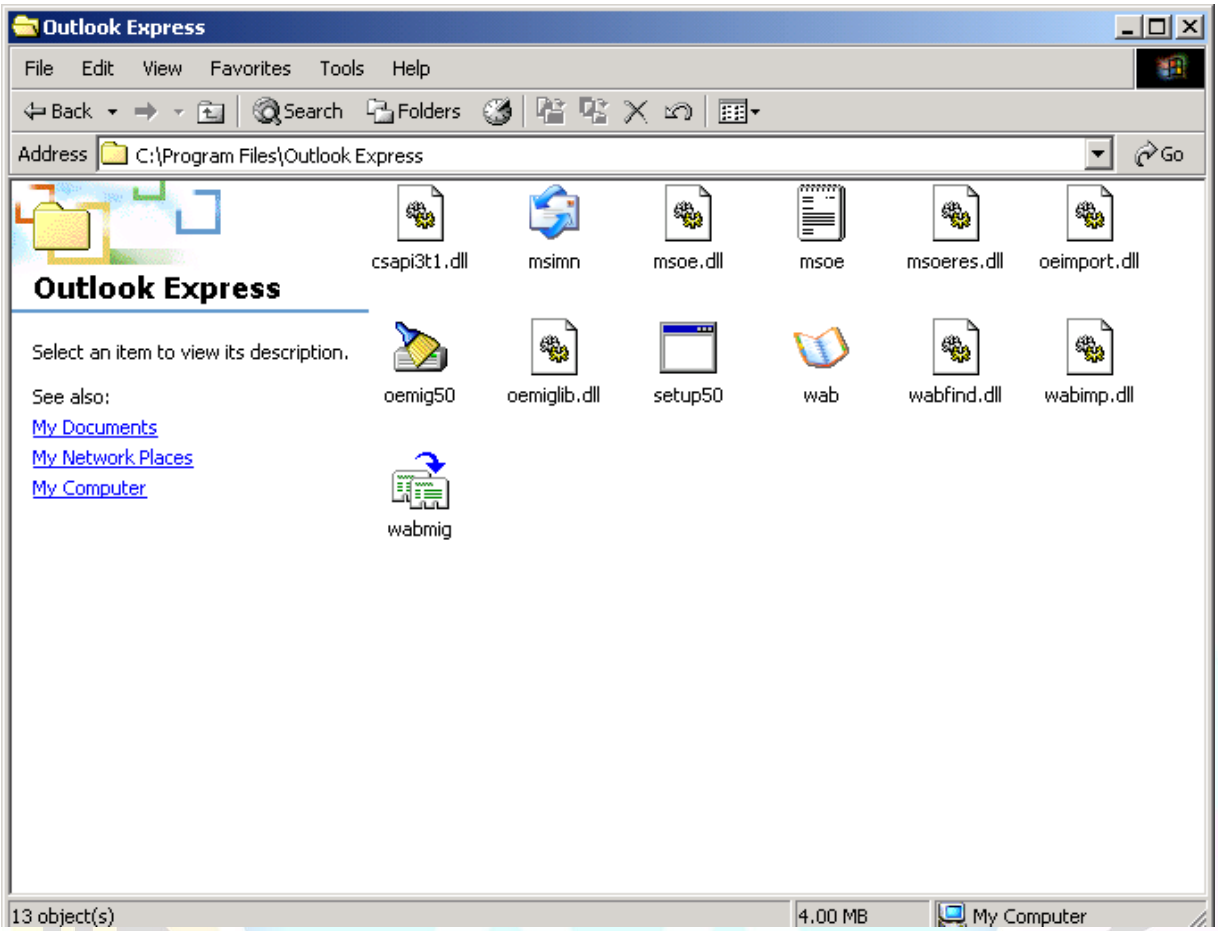
C:\Program Files\Outlook Express

If we break down the path name, it will make more sense to you.

- **C:** is your hard drive. That means this file is on your hard drive,
- ***Program Files*** : is where all applications like Outlook and programs are stored.
- ***Outlook Express***: is the name of the application

Inside this file you will find all the folders or files that make Outlook Express work. It is not advisable to delete any of these files since your application or program will not work if you do and will need to be reinstalled or repaired

lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects



Application Software

Lets you accomplish specific tasks, such as writing a letter (Microsoft Word), or adding a column of figures Microsoft Excel). This is the software that you do your work in.

The are different software programs for different work applications:

- ✓ MS Word is used for general business and private correspondence: letters, faxes, memos, CV's, etc. This kind of software is called word processing software. Corel Word Perfect is another example of a ***word processing*** program
- ✓ MS Excel is used by accountants and auditors to add columns of figures and do bookkeeping transactions. Excel is an example of ***spreadsheet*** software. Other kinds of spreadsheet software include Lotus 1,2,3 and Quattro Pro.
- ✓ There is also software that enables you to build a ***database***, such as a client contact list. Doing a database on the computer has many advantages. Think of a telephone book where you can look up a person's telephone number by using either the address, the first three digits of the telephone number, the area in which the person stays, the surname or initials, rather than only according to surname as in our printed telephone books That is what a database can do. MS Access is database software.
- ✓ CorelDraw is an example of software. This allows you to draw pictures on the monitor or change pictures and photos. Paint, which is found on most computers, is also an example of graphic software. However, Paint cannot do as much as CorelDraw.
- ✓ ***Desk Top Publishing*** is software that enables you to print brochures, business cards, newsletters, banners, etc. MS Publisher is an example of this kind of software.

- ✓ Internet Explorer and Outlook Express are software programs that allow you to ***communicate*** over the Internet.
- ✓ And, of course, games are also software application programs.

Software programs are electronic instructions, written by people called programmers. There are various programming languages available today. When people start learning about programming, they usually start with C+ or Visual Basic.

It follows then, that C+ and Visual Basic are ***computer programming*** languages.

Word Processing (MS Word)

Purpose And Use

A word processing programme allows you to create documents used for general correspondence in the home and at the office. Before we had computers, we used typewriters to create correspondence.

Examples

A word processing program is a program that allows you to type various documents, for example:

- ✓ A ***letter*** to a friend
- ✓ Or a business letter
- ✓ Or a school project
- ✓ Or a ***menu*** for a special function
- ✓ Or a report
- ✓ Or minutes of a meeting

In other words, a word processing program allows you to type various documents on your computer!

Benefits

- ✓ You can change the appearance of your document without retyping the entire document
- ✓ You can add colour, pictures, tables and even text effects to your document
- ✓ A word processing programme such as MS Word also has the benefit that you can check spelling and grammar while you are creating your document
- ✓ It is easy to correct mistakes
- ✓ Word processing programmes have templates of correspondence that is used often, such as fax cover sheets, that you can use for all your faxes. You then only fill in the areas that have changed

Start MS Word

Once Word has been installed on your computer you can start the application double-clicking the Word icon .

OR

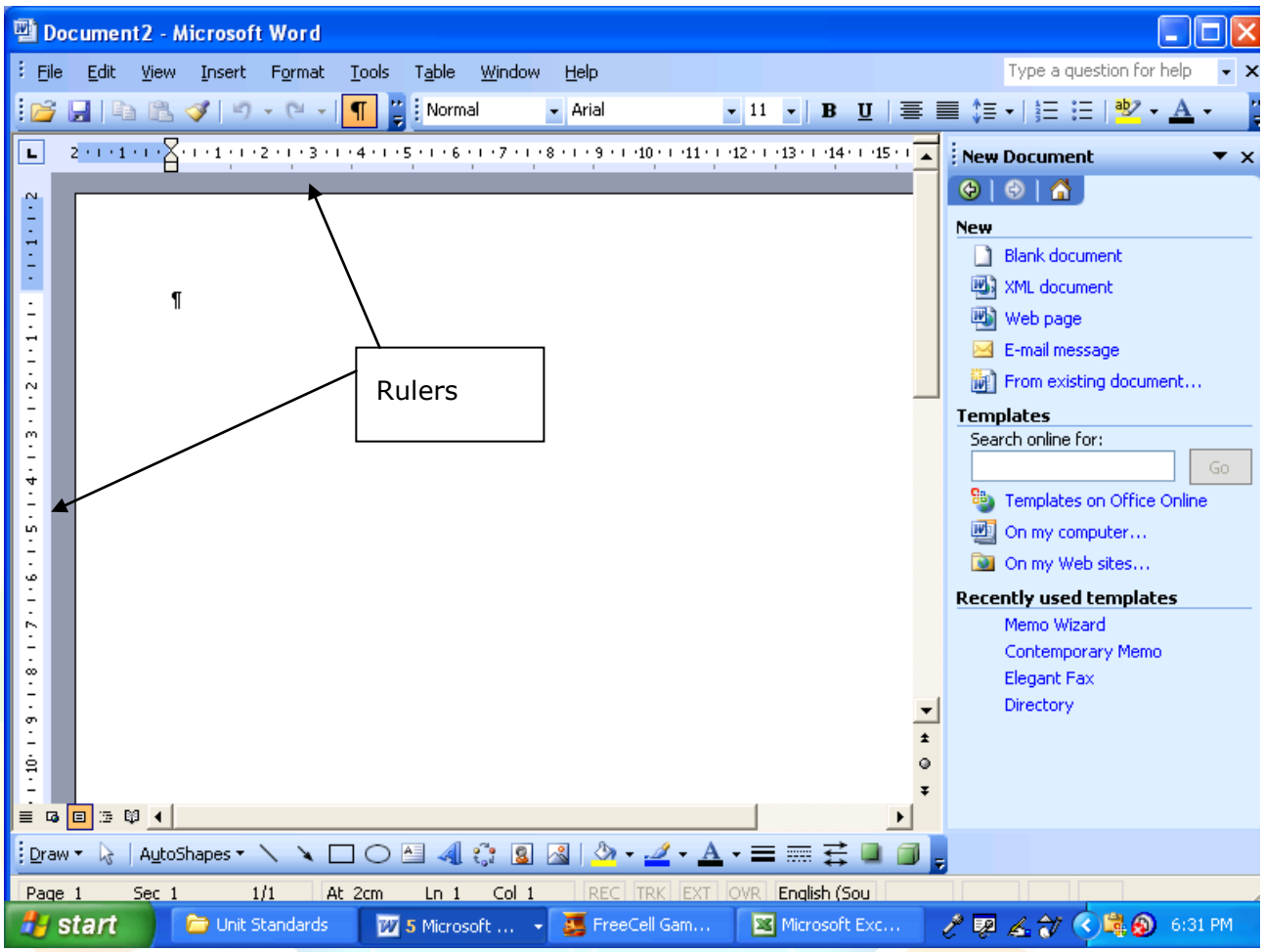
- ✓ On the Taskbar, click the Start button then select the All Programs menu item.
- ✓ The All Programs submenu is displayed.
- ✓ Click the Microsoft Office program item
- ✓ Click the Microsoft Word program item

The Microsoft Word window opens on your desktop.

lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects

lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects

The Ms Word Application Window



The Title Bar

The Title bar is where we find the name of the program as well as the document we are working in. Since you have not yet done any work, the document is simply called Document 1

The Menu Bar

The menu bar displays menus. The menus contain the commands available in Word. You choose commands to perform tasks in Word.

Toolbars

The toolbars contain icons that are a duplication of some of the commands contained in the Menus. The Standard toolbar contains general commands such as open, save, print. The Formatting toolbar contains commands to format (change the appearance) of certain aspects of the workbook.

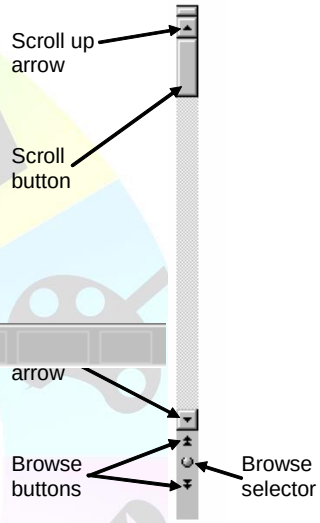
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects

Rulers

The rulers enable you to plot where you are in your document, as well as where to place items such as pictures

Scroll Bars

Scroll bars are used to view parts of the workbook that are not visible.

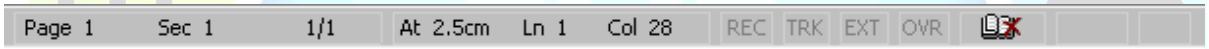


Windows Taskbar

This is a part of Windows and displays the buttons of the programs, which have been opened, as well as the time and the Start button.

Status Bar

The Status Bar is situated at the bottom of the Word screen and which shows you what is happening in your document.

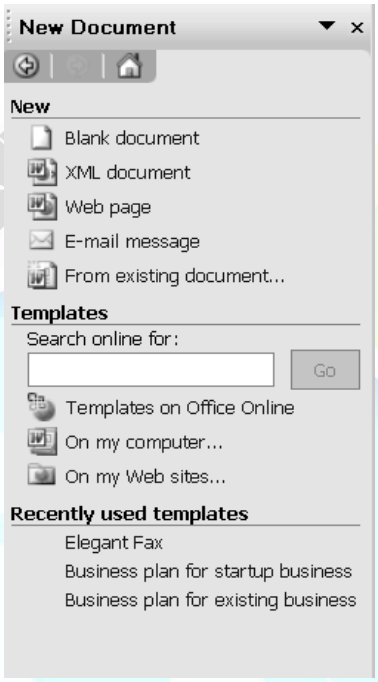


Task Panes

Task panes are designed to carry out common tasks more easily. Task panes are used in all Microsoft Office XP applications. In Word there you will find task panes that will help you to create and open new documents, search for files, insert clip art images, and so on.

As soon as you select the appropriate command, the task pane will show on the right-hand side of the window.

Note ***You will find these features in all Microsoft applications.***



Closing The Word Desktop Or Window

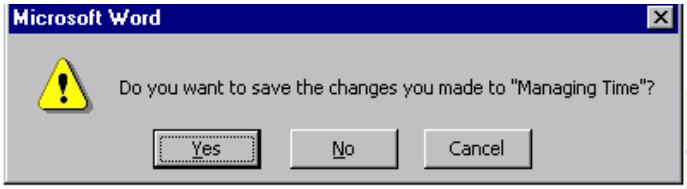
Close The Word Application

There are various ways of closing the Word Window, the easiest one is to click on the cross X in the top right hand corner of the desktop:

If you have made changes to your documents since you last saved it, the following message will appear:

Do you want to save the changes you made to Managing Time?

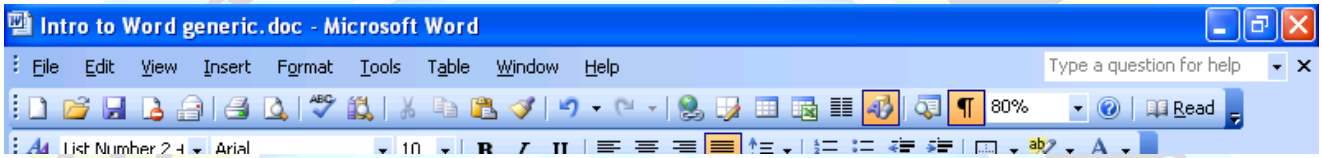
- ✓ Click on Yes to save the changes.
- ✓ Word will automatically save the changes and then close the window.
- ✓ You can also close the Word window by selecting the File, Close menu and following the same procedure as above.



Close The Word Document

You will notice that each document in Word also has a window of its own:

- ✓ To close only the current document, click the second X in the window:

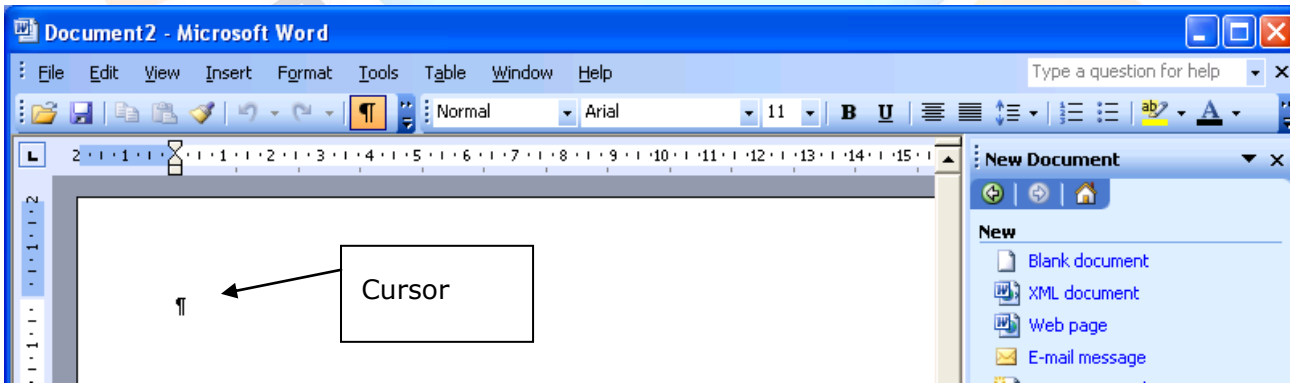


Formative Assessment 6

Create A New Document

Your Workspace

- ✓ In the centre of your Word window is white rectangle. This is where you will type your document.
- ✓ In the top left hand corner, of the page you will see a blinking black line. This is called the cursor and this blinking line will always be where you start typing. The cursor moves along the page as you type.
- ✓ Rulers that show you where you are on the page.



Typing A Document

Type the following text onto your page

There is only one thing you can do with time, spend it. How you spend your time will directly affect your success. Each person on earth is given the same 24 hours each day. Have you noticed how some people get more done than others in the same 24 hours?

Saving A Document

Naming Your Document

When you create and save a new document, you have to take care that you:

- ✓ Give the document an appropriate name
- ✓ Save it in the correct folder

When naming a document in Word, you must follow the same conventions as when you name a document in the workplace. Do not give the document silly names such as: Annatjie's document or letter dated 7 September.

In your workplace you will have certain filing conventions that have to be followed, e.g. the client's name, followed by the date or even the kind of letter you are creating:

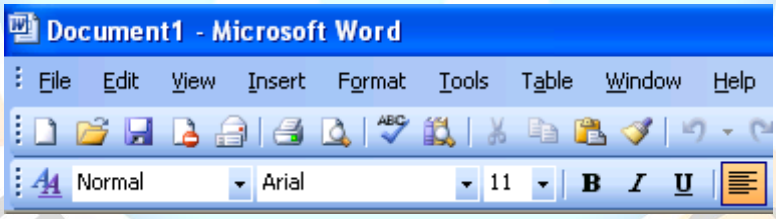
- ✓ BMW quote 7 Sep
- ✓ Telkom account query 3 Feb 2005
- ✓ XYZ Traders order 7 July 2005

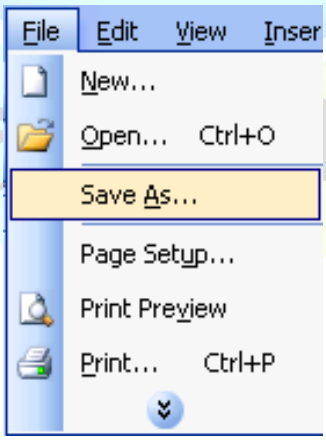
When you save your document, you must also follow the filing rules of your workplace. If you have a filing cabinet at work, and correspondence for XYZ Trading is filed in a drawer, in a folder named XYZ trading, you must do the same on your computer. You will have to open a folder called XYZ Trading in your My Documents folder and then save all the correspondence relating to this customer in that folder.

Save Your Document

Now you must Save your document to make sure that it is not lost when you exit out of Word. At the moment your document is called:

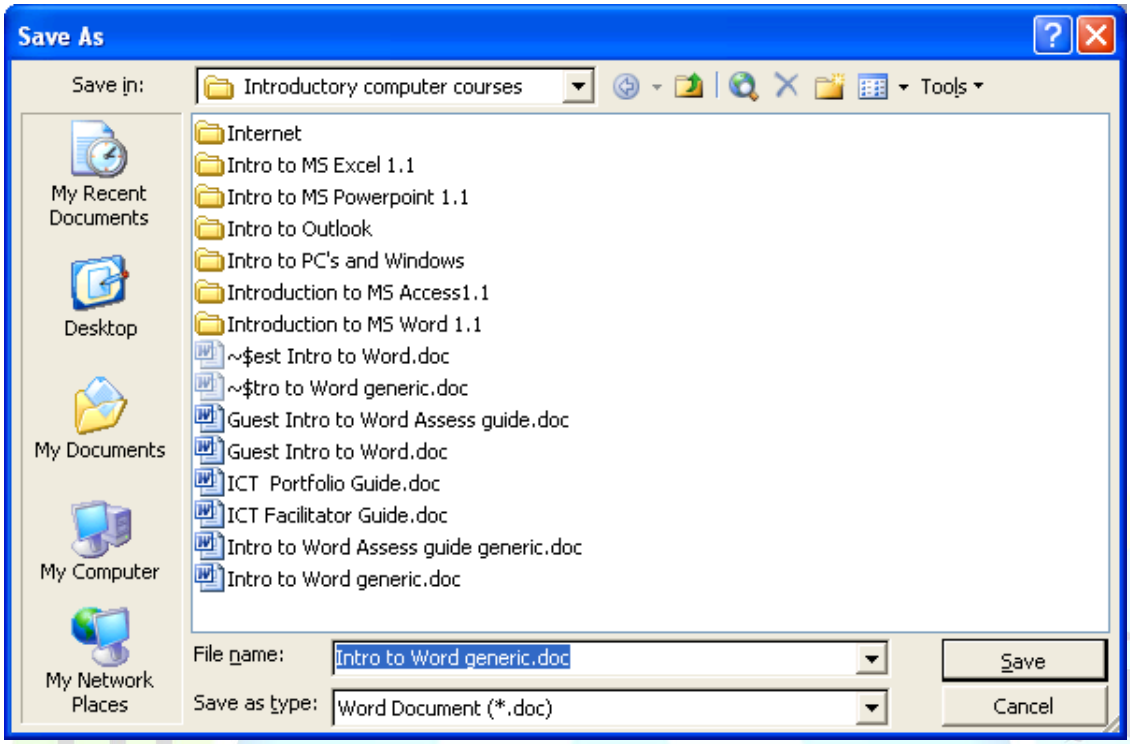
Document 1 As you can see in title bar of the Word window.





- ✓ To save your typed document, click on the File Menu and a menu will appear.
- ✓ Click on Save As for the Save As dialogue box to appear:

lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects



Formative assessment 7

Spreadsheets (MS Excel

Excel is a spreadsheet program. It adds long columns or rows of figures for you. You can also put together a list of clients or contacts with all their details: addresses, telephone numbers, postal addresses, etc.

The basic working environment in Excel is a workbook that can contain one or more worksheets. (Remember, in Word we spoke about a document - in Excel it is called a worksheet.)

A worksheet is similar to an accountant's ledger, with numbers; text and calculations lined up in columns and rows. However, unlike in an accountant's ledger, Excel will do the calculations for you.

Excel also makes it easier for you to change, delete or add information. You can also arrange multiple worksheets within a workbook – for example, you can place all the worksheets for one client

Other examples of spreadsheet programs are: Lotus 1,2,3 and Quattro Pro.

What Is An Electronic Spreadsheet?

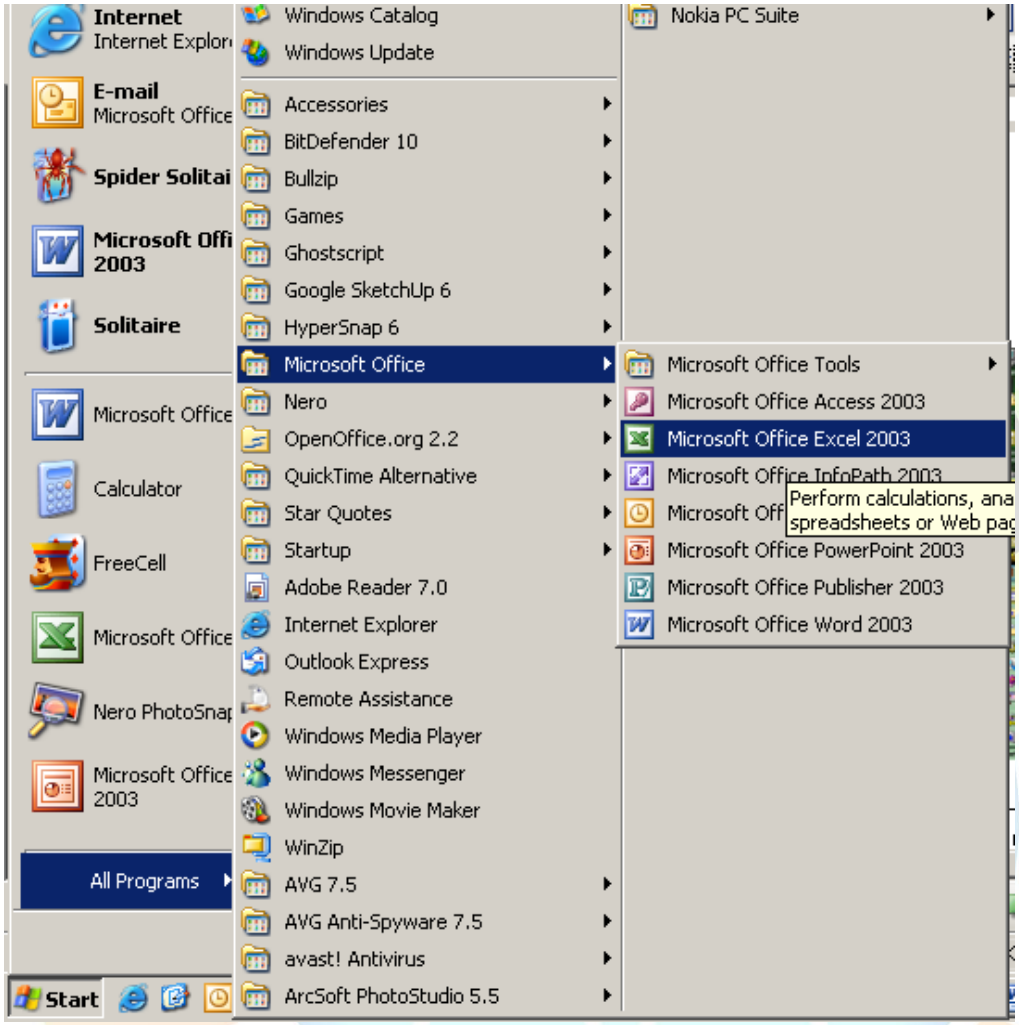
Traditionally, people used a ruled columnar pad, a pencil and eraser and a calculator when doing bookkeeping. A spreadsheet, called a workbook in Excel, replaces these tools. The program uses a format very similar to an analysis book which can be bought in any stationery shop: it looks like a large piece of paper with columns and rows on which you do your work.

Start Excel

First, you must start Excel. Click the Start button, point to All Programs, select Microsoft Office and then click on Excel

The Excel desktop, with a blank worksheet pops up on your screen. Do this now, so that you can see what the Excel desktop looks like.

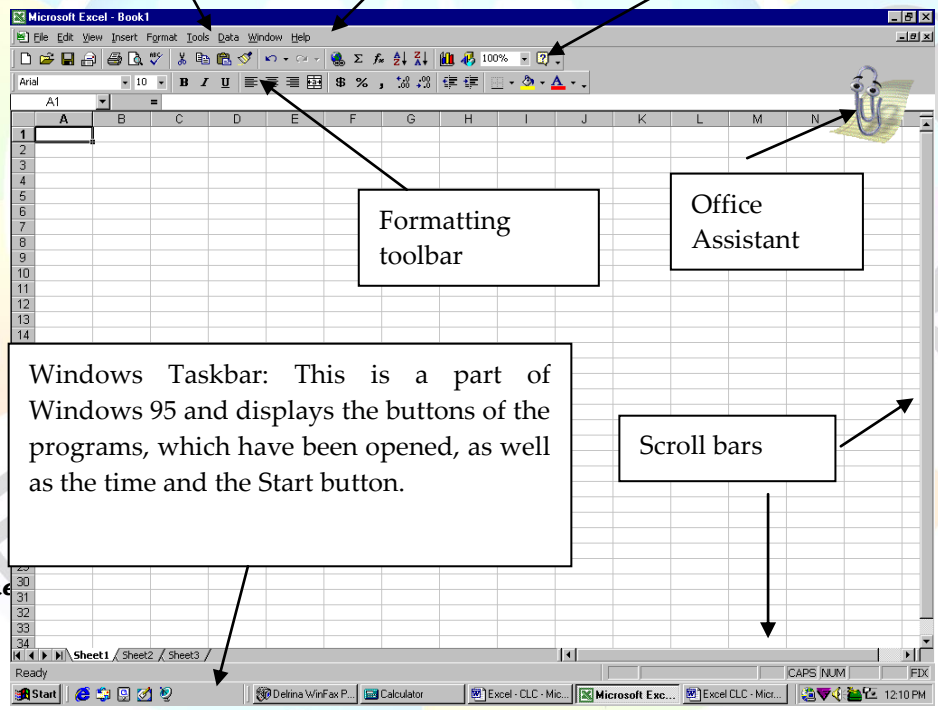
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599
Sakhisisizwe Projects



Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

The Excel Desktop

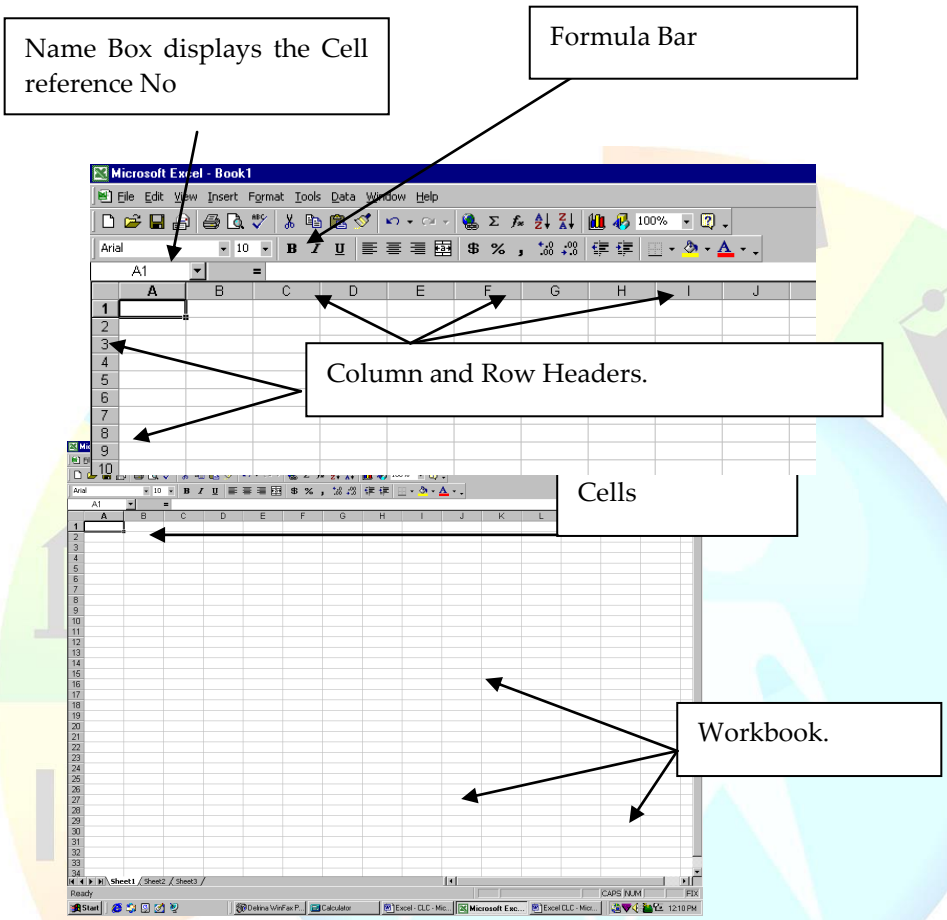
- ✓ The Title bar is where we find the name of the program as well as the workbook we are working in. Since you have not yet done any work, the workbook is simply called Book 1
- ✓ The menu bar displays menus. The menus contain the commands available in Excel. You choose commands to perform tasks in Excel.
- ✓ The toolbars contain icons that are a duplication of some of the commands contained in the Menus. The Standard toolbar contains general commands such as open, save, print. The Formatting toolbar contains commands to format (change the appearance) of certain aspects of the workbook.
- ✓ The Office Assistant gives Help.
- ✓ Scroll bars are used to view parts of the workbook that are not visible.
- ✓ Windows Taskbar: This is a part of Windows and displays the buttons of the programs, which have been opened, as well as the time and the Start button.

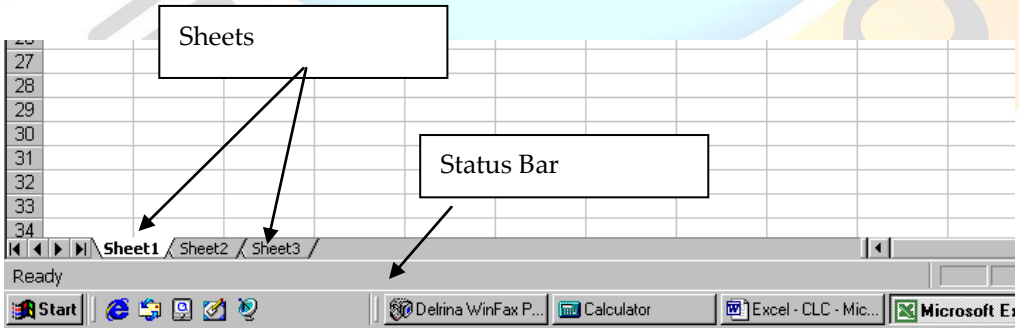


You will find the

Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

Features That Are Unique To Excel

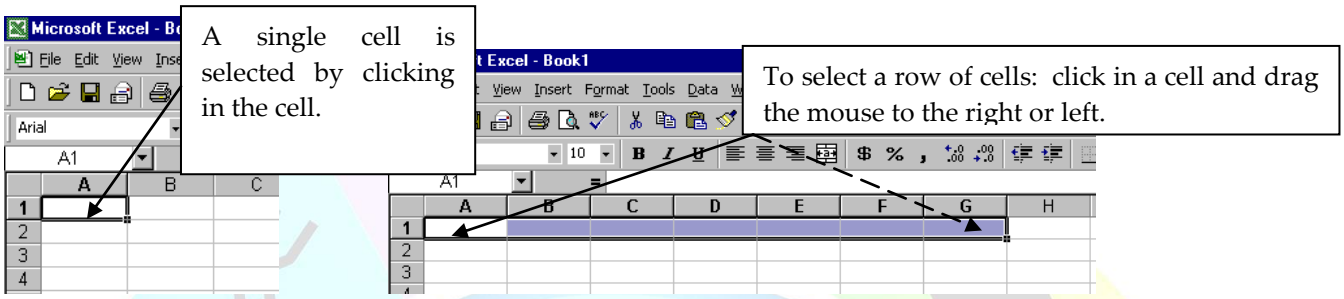


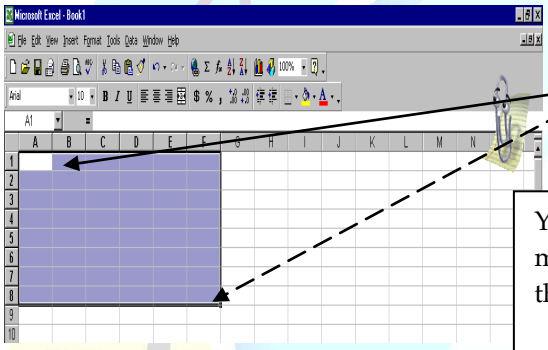


Sakhisisizwe Projects
lev@mweb.co.za
www.sakhisisizwe.co.za
0825722599

Moving Around In A Workbook

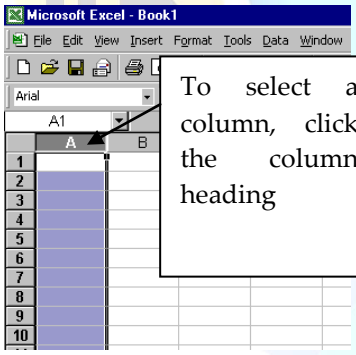
In the previous lesson you were shown what a workbook looks like and also how to select worksheets in the workbook. Please refer back to this lesson if you are unsure how to continue.



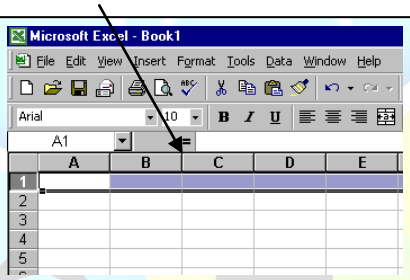


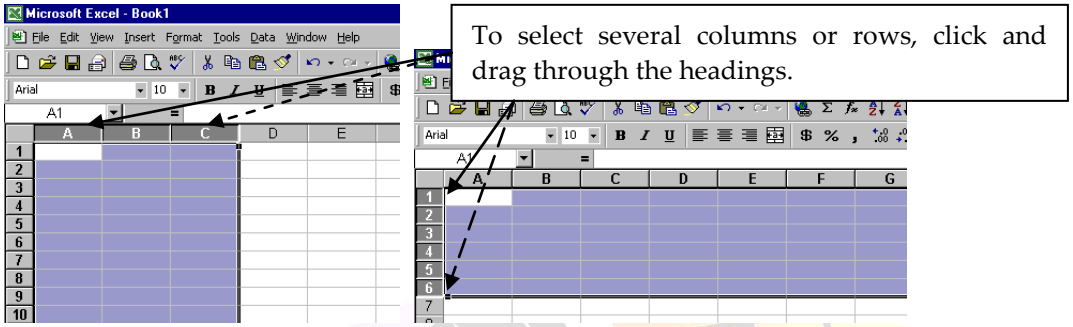
To select a block of cells: click in a cell and drag the mouse to the left (or right) and up (or down.)

You can also use the keyboard by pressing the Shift key and moving around your screen using the arrows. As soon as more than one cell has been selected, we call it a range of cells.



To select a row, click the row heading.





MEET AND MAINTAIN SERVICE LEVELS

Outcome

Meet and maintain service levels

Assessment criteria

- ✓ Relevant company specific levels are implemented
- ✓ Implementation processes are monitored to ensure compliance
- ✓ Service level timeframes and targets are consistently met as per company specific requirements
- ✓ Potential constraints in meeting and maintaining service levels are identified and evaluated

What is Process Integration?

Process integration is the way the Help Desk marshals its resources to fulfill its business objectives.

It draws together the management of different resources and processes into an effective business plan targeted at meeting the standards of service set out in a ***Service Level Agreement***. The Service Level Agreement documents what services will be provided and at what level with a particular customer.

The goal of process integration is to provide an effective problem management solution that meets the standards set out in a service level agreement.

To provide an effective problem management solution, the following components need to be in place:

1) Trained and motivated ***support professionals***, competent in customer service, Help Desk tools, problem solving, negotiation, team working and possessing detailed technical knowledge of the things supported

2) Management of ***resources*** so that the Help Desk's productivity is optimized

3) Effective management and implementation of Help Desk ***technologies***

4) ***Security*** management to ensure the reliable provision of services and the safety of assets

5) **Knowledge** management and sharing

6) ***Quality assurance*** procedures to measure the efficiency of the service and ***customers' satisfaction*** with the service, using

the results to improve each part of the business further

Handling Support Calls

Telephone communication will form a large part of your activities in the call centre. This section concentrates on telephone support calls for Help Desk analysts, but many of the suggestions can be adapted for other call centre functions as well as face-to-face and written communications.

The structure of a typical support call along with the skills required is as follows:

Greeting

- ✓ Etiquette
- ✓ Attitude

Assess the customer's problem

- ✓ Listen
- ✓ Question
- ✓ Empathy/Rapport

Resolve or escalate the call

- ✓ Instruct

Close the call

- ✓ Document

Follow up

The Greeting

You will often have heard that first impressions count. Fortunately this is true - if you can create a good first impression, the remainder of the call will be that much easier.

You could look at it the other way; if the initial greeting does not go well, both the caller and call receiver are likely to be put "on their guard". However, establishing an effective greeting and first impression is not hard to do.

Greeting goal

The goal of your greeting should be to:

- ✓ Identify yourself, your organization and/or department
- ✓ Offer assistance, using the customer's name

It is vital to establish the customer's name from the greeting. It is equally vital that you establish how to pronounce it correctly and how to spell it correctly. Once you have learned the customer's name, you should use it throughout the call. This will help to establish a rapport with the client.

Call management technology will often identify a customer to you, displaying personal details, such as name and organization, and details of previous calls.

Developing a greeting

Never, never, just say "Hello". Use "Good morning" or "Good afternoon", followed by your name and/or department, and probably the department function. This gives the right touch of interest and conveys enthusiasm.

All this is very flexible, but should end up as something like "Good afternoon, Ann Jones, Help Desk. How may I help you today?".

As well as the words you say, the way in which you say it is equally important. This will be dealt with by the following topics.

Note	***Even though you may have a "standard greeting", it is important to make it sound personal and welcoming. What you put into the greeting should be maintained throughout the call***

Etiquette

Etiquette means the proper way of behaving. A number of skills are required to establish a proper telephone manner.

Speak Clearly

The first requirement of verbal communication across telephone lines (which can be comparatively clear or extremely indistinct) is the ability to ***speak clearly***.

Unfortunately, this is not as simple as it might appear.

There are those who mumble and who consistently mispronounce words. There are others who speak in a very quiet voice that is hardly audible, and yet others who speak so rapidly, that many of the important words of a conversation are lost. Under any of these circumstances, if we add the problems of a "bad line" or background noise we could end up with a prospect or a customer who despairs of ever understanding us. In the extreme, they may want to ring off; however, they are tied into requiring our support.

The first and easiest thing to control is the ***rate*** at which you speak. Most people speak too quickly on the telephone. One of the pitfalls of knowing a subject thoroughly, and having recited it many times before, is that we speak about that subject at an unnaturally rapid rate, almost assuming that the listener knows as much about it as we do.

On the other hand, we should not speak too slowly, as the listener will then become impatient and wonder when we will get to the point. Analyze your rate of speaking. Are you boring your listener by slowness or confusing them with speed or have you got it just right? (which for the listener, is the same speed that they speak!)

Vol*ume* is equally important, and is fairly easy to control. The impression sometimes seems to be that because the other person

is not speaking at the same volume as you, that you can change their understanding by trying to quiet them. If you have ever seen someone holding a phone away from their ear and grimacing, you will know how irritating a loud telephone voice can be! However,

the only way to reduce someone else's volume is to speak at their volume and slowly lower yours allowing them to follow your lead.

The carefully tempered sound - which can be adjusted for each call until it is felt to be right - is the appropriate approach.

Good ***pronunciation*** is also vital. For instance, if an 'f' is pronounced to sound like an 's', the sort of problem that can arise in technical support could have grave consequences. Clear pronunciation makes it much easier for our caller to concentrate on the total message. If we mumble or mispronounce, a percentage of their concentration will go towards trying to understand what we are trying to say. Under these circumstances, any form of telephone conversation can lose its effectiveness.

Analyse your ability to speak effectively. Practice improvements on subsequent telephone calls. In straightforward circumstances, this can often be all that is required to enhance your ability to develop a good rapport with every caller.

In summary:

- ✓ Speak clearly
- ✓ Speak at the correct speed and at the correct volume
- ✓ Pronounce words clearly
- ✓ Be decisive, but also be encouraging
- ✓ Analyse your telephone presentation

Answer promptly

More than three rings can seem like a long time to the caller. Commonly, after four rings, the caller is put through to voice mail.

Language and style

Sound as efficient and as "high class" as the company needs you to be when talking to the customer. The way we talk on the telephone requires a very high standard of approach.

It is best to match your style of speech to the caller's. However, do not use slang, colloquialisms or patronizing terms of endearment

("Alright Dear. How's it going?")

Matching the customer's style is important because it:

- ✓ Builds rapport
- ✓ Increases understanding
- ✓ Puts the customer at ease

It should go without saying that you never use obscenities, even 'mild' ones, whatever the provocation.

Speaking about technical subjects

When speaking about technical subjects, it is important not to use ***technical phrases*** (jargon or lingo), ***abbreviations*** (shortened words) or ***acronyms*** (a word made up from parts of other words) without establishing that the caller genuinely understands them. Remember that customers are usually unwilling to admit that they did not understand what you have just said.

Be brief, but accurate and pleasant

Be brief - but not curt. A long list of trivialities or an over-abrupt approach can both give the wrong impression.

Transfers

Top	***The golden rule is: Don't Transfer Calls Unless Absolutely Necessary.***

Sometimes, this can be extremely difficult. If you pick up a caller trying to find a person within the Help Desk team, handle him or her sensibly. That is, find out exactly what they need, offer to take over the problem yourself; if it would seem to have been a 'long story', put them on hold if necessary, and try to find the person for them if practical.

Use the phrase "Can I put you on hold please, while I check for the person you require?". They need to feel that they have the choice. Tell the person taking a transferred call the name of the caller and what they want. Only transfer callers if you think there is a good chance that they will get where they want to be.

Answering somebody else's phone

When you answer somebody else's phone and you are not able to help, always ask the caller for their company name (where relevant), their own name, number and extension.

Arrange for the customer to be called back, and make sure that you leave a message with a date and time for the person whose telephone you have answered. Indicate if the caller is to be contacted by telephone (same number?), e-mail or fax.

Using hold

Do not keep the customer waiting. If they must be put on hold whilst you make enquiries, make sure they are reminded constantly that they have not been cut off. Generally a better idea may be to take their number and ensure that either you or another problem- solving person will call them back. Allow them to choose this option.

It's tea time

Always leave your desk for a break. Don't get caught out drinking, smoking or eating whilst using the telephone. Eating crisp breads sounds something like machine-gun fire, and smoking like passionate sighing. Unless we want to convey any of these reactions to our customers, it is probably best to wait until the telephone call is over before we consider eating and drinking. Laughter and talking in the background can also create an unprofessional atmosphere, particularly if you are discussing a problem. However, the sounds of people working lets the caller know that you are not alone, and this can be reassuring!

Wrong numbers

The possibility of obtaining a wrong number emphasizes the desirability of a standard method of personal introduction. If a call is put through to you in error, it should be remembered that the intrusion is not intentional, and that it is probably as irritating for the caller as it is for you. A courteous re-direction of the call is usually appropriate. If possible, offer to check the number that they are trying to reach.

Attitude and Self-Image

When using the telephone it really does not matter whether you are short or tall, thin or plump, young or old. The thing that helps us to be successful on the telephone is a good self-image. In fact, of course, this applies to all successful people. They believe in themselves, and that is the key in almost every activity. The reason it is doubly true in the case of telephone communication is because you cannot expect customers to believe in you - unless you believe in yourself.

'Positive perceptions' can travel across a telephone line for thousands of miles to the person to whom you are talking. Your enthusiasm and conviction can make itself felt over the telephone as effectively as if you were sitting across a desk from them. There is little doubt that nothing is so infectious as enthusiasm. A voice that is dead, monotonous and unenthusiastic can create a negative state of boredom within seconds of the start of a call. Telephone enthusiasm projects your belief in yourself, your company and your service.

If you happen to feel that you do not have a good self-image, how can you get one?

If you have to tell someone over the telephone how your department works, make sure that you know how it works yourself.

It is difficult to think highly of yourself or your department if you do not know what you are talking about and it is hard to be confident and full of enthusiasm about their problem. There may well be some questions to ask and some homework to do, so that you know your business as near to one hundred percent as possible.

There should not be too many things the customer can ask that you cannot either answer yourself, or refer to someone who can answer.

Your self-image and the right attitude also depend very largely on being prepared to answer and make telephone calls - it is not enough to talk yourself into a sense of false security. A successful self-image depends on preparation - preparation to speak effectively, to listen attentively, identify the problem, find a solution and so on.

YOU own your personal image - that image can be developed by making sure you know about your business and what the customer needs, objectively and subjectively.

It is possible for your self-image to change very quickly - from passably good to extremely effective. It is in your hands.

Believe In Your Service

Enthusiasm for your service transmits itself very readily down the telephone.

Remember, if we have any hesitation in conveying the quality and effectiveness of our services, the customer loses confidence too, and, over the period of one call, becomes less likely to make a decision in our favor.

You can probably visualize a situation where your words are hesitant, slow and negative. Our customer is listening carefully to see what reaction they get when they put a question or make a statement to us. Our approach to the customer and to their

question or problem is the answer from the Help Desk, not just from us. Therefore, the belief that we have in our product or service can be interpreted as quickly by our customer as our team and company image.

In the same way that racing drivers must have confidence in their cars, insurance agents in their policies, and divers in their breathing equipment, so we must have confidence in the department that we represent in our company.

Ask yourself the questions "If I were the customer, would I buy this service?" If you don't believe in it, why should anyone else?

A Confident Sense of Humour

Laugh and the world laughs with you, cry and you cry alone..... Obviously, humour must be carefully balanced. When the timing is right, a sense of humour is appropriate. Humour can make an otherwise dull conversation

come alive. It can be relaxing - it can also make doing business enjoyable, and invariably customers want to "enjoy" doing business with us. At the right time, the right touch of humour can be an effective icebreaker.

But be careful and discreet - be sensitive to the listener's personality. Some people are determined not to laugh if their problem is causing them a great deal of trouble, and why should they? Humour can backfire but, smiling on the telephone, being pleasant and amusing can create an atmosphere in which anything can be discussed and "decisions" seem to be more readily acceptable.

Be Interested

Boredom occurs very rapidly these days for most business people. When a telephone is rarely at rest for many seconds, the same old, monotonous presentations that are heard through the ear piece quickly and easily create a state of boredom. Used badly, the human voice has a propensity for making the most exciting situation in the world appear dull.

It is essential to get that vital touch of showmanship into your business discussions. It should not be exaggerated to the state of trying to make the caller appear immature, but it is vital to keep the attention of a prospect or customer. Therefore, by adding emphasis and variety to the sounds we make, we can provide a dramatic format in which to hold an audience captive.

If we know the answer to a customer's problem which they have just explained to us, then we could be seen to have a fine script. If the presentation that we make, (which includes giving the answer to the problem) is good to listen to, then we usually get the unheard applause that we deserve. The applause in this case could be continuing goodwill of the caller towards our team.

The answer to avoiding boredom in using the telephone in any circumstances is the variation of the tone of the voice, together with the other points we have considered under the heading of "Speaking Clearly".

Smile On The Telephone

The human brain has to work harder to establish a personality relationship on the telephone than it does in a face-to-face situation. So many of the valuable physical attributes that help

communication are missing. The reason that we talk about smiling on the telephone when, in fact, the physical side of smiling cannot be seen, is because we have to feel like smiling to create a friendly sound on the telephone. The caller cannot see us when we pick up the telephone. Because of this factor, we are often inhibited from trying to convey the warmth that comes with the smile that we give to a person standing in front of us.

Many large companies who spend considerable amounts of money and time on improving their telephone communication, feel so strongly about the importance of the friendly telephone response that they print the word "Smile" around the instrument.

This is simply because they realize it is hard to sound unfriendly when you are smiling, and that a reminder of this is often sufficient.

Listen

Through the telephone, what the customer says is our only feedback. There are no facial expressions, no body language and no visible signals, no furrowed brows, no friendly smile. The person on either end of a telephone can only listen for a reaction.

The lack of visual feedback need not be a major handicap. The astute telephone person develops a higher awareness of words, so that the customer's "point of view" can be diagnosed quickly and effectively through careful listening.

Most people who use the telephone frequently become comparatively good at talking.

Through striving to create impressions through words, the mind of the telephone speaker is involved constantly with creating the next sentence or with the flow of appropriate words.

It is not true, of course, that the greater the amount of talking we do the more successful we will be, because if you fail to listen you will probably be speaking from your own (or your company's) point of view rather than the customer's. There are times when silence is golden. We need to hear what the customer has to say. If we do, we can phrase our replies in the most effective terms.

When we extend the courtesy of listening to another person, we let them know that we care about them and their situation.

Remember the Team

In our eagerness to deal with our customer and to handle the immediate situation that requires our attention, we gain loyalty and interest in ourselves alone. Whilst this is important, it is also very necessary to build up the team alongside ourselves. If everybody does this, then the image of our team gains a more favorable overall exposure

Remember the Company

People continue to admire loyalty, and see this "building" of the team as a sign of the character of the company. The company is outstanding in many respects and where this is so, flaunt it. Let the customers know why so many people enjoy doing business with us instead of with the competition. If we miss doing this at every opportunity that occurs, we are wasting a very good chance to emphasize in our client's mind the benefits they gain from working with us.

No matter how familiar you may think the customer is with the company, additional praise is an excellent way to re-affirm credibility.

If the customer can see all of our functions as a team effort in their marketplace, much of the financial involvement that they have with the industry could go in our direction

Dealing with the Call

If a customer rings us with a problem we should take them through a "diagnostic" check. This should include the subjective areas that surround the actual problem.

Use a constructive, positive questioning routine. This process has several advantages:

1) It shows the customer that we are professional and efficient.

2) It takes the customer away from the highly emotional states, which can be engendered when a problem occurs.

3) It establishes an information base so that we can start to solve the problem.

4) It persuades the customer that if something goes wrong with any part of their system, they can have confidence in 'phoning us because we always do something about it.

The end result is that the customer wins, and that is very important. Make the customer feel comfortable in calling us or receiving our call. Be seen to be accessible to our customers. A common complaint is that the Help Desk is keen to help but don't really offer a very good service.

Handle Complaints

No matter how well we do business, sooner or later the law of averages suggests that we are going to have a dissatisfied customer calling to complain. Whether it is we who are at fault or the customer, is not the issue. Being right is not important. What is important is how does the customer feel after they have talked with us? Tact, politeness and consideration are the name of the game.

It stands to reason that a customer who calls to complain is likely to be upset, so that stage one of our responsibilities at this time is to listen, express our regret that they have a problem, explain that you are concerned and want to find a solution. The important point about this is that once a customer knows that you care, that you are not going to fight them but help them, they will relax. After all, it is very difficult to scream and shout at someone who is obviously on your side!

The second stage in handling a complaint is to understand it.

This sounds simple, but sometimes it can take a lot of work to get the accurate facts out of a confused and annoyed customer. The initial outburst probably only gives us less than a quarter of the information we actually need to act on their behalf. So naturally, the all-important third point is that we should ask all the right questions

in order to identify the problem quickly. Remember to take notes while you talk.

If you can't solve the problem whilst you have the customer on the

telephone, take their number and arrange to ring back. Always, but ALWAYS, ring back at the time you say you are going to, whether you have the answer or not. Remember, the longer the complaint is unsettled, the more upset the customer is likely to become if they do not have your assurance that their problem is receiving attention.

Remember that customers do not necessarily expect that we can solve their problems immediately.

Closing the Call

Closing the call should:

- ✓ Provide a resolution of the problem (either the problem is solved or the customer is aware of the next step [what it is and when it will be taken])
- ✓ Provide the customer with the opportunity to ask questions
- ✓ Thank the customer and offer help in the future, leaving a positive recommendation of your company in the caller's mind

Always try to leave the caller in a good frame of mind as a result of their conversation with you. The company needs all the goodwill it can get between its various functions and departments, and between internal and external customers.

Achieving the objective need of the caller is one thing; giving them subjective satisfaction and making them feel good is equally important, but requires a wholly different set of standards.

There is a whole lot more to making the best use of the telephone than just being able to pick it up and say "hello". It is an instrument that can be turned into an art form and the benefit to our company of treating it in this way far outweighs the effort of making it happen.

Some companies are very good at it, and accordingly they get corresponding benefits

Call Handling Process for the Help Desk

This overview of the call is intended to lead the students into a discussion of the role of the analyst.

The core activity of the Help is the support 'call'.

Tip	***A 'call' could be a face-to-face request, a telephone call, a fax or e-mail, and so on.***

The following process outlines some of the steps involved in the support call. A structured process can be made the basis of a ***Service Level Agreement*** between the Help Desk provider and the client to agree on the standards by which the services will be provided and measured.

1) The customer calls with a problem

2) The Help Desk advisor makes a note of the request or data is captured on a call handling system

3) The request is given a reference (or log or ticket) number

4) An acknowledgement of the call is sent back to the customer either verbally or by e-mail

5) The Help Desk Analyst responds by either solving the problem there and then, thus logging the resolution and closing the call OR escalates the problem

6) If the problem is escalated, the person that takes over the problem now has responsibility for resolving it (ownership), logging the resolution and closing the call

7) The Help Desk Analyst verifies with the customer that they are satisfied with the solution

8) The call is closed and the call log updated

9) A relationship building follow-up call is often regarded normal practice, and is beginning to be expected by the customers

Documenting Support Calls

In a Help Desk environment, it is not practical to expect to remember the details of each call. Attempting to do so will lead to lost calls, frustration and poor customer service.

The value of documentation in terms of the current call is to:

- ✓ Preserve accurate information

- ✓ Provide observation not opinion
- ✓ Record details not generalizations

Documentation has additional value in terms of organizing and optimizing the activities of the Help Desk organization:

- ✓ Analyse call data (frequency of callers, frequency of questions, frequency of particular topics or components). This information can be used to optimize support centre activities (for example, establish bulletin boards, Frequently Asked Questions or automated responses to common problems, distribute resolutions of difficult problems, and so on).
- ✓ Solve future problems efficiently by storing resolutions in a knowledge management system.
- ✓ Analyse the product - information received can be input back into the product development cycle.

Depending on the technology available, calls may be documented by hand (writing notes), in a word processor or database, in a contact application or in a call management system.

However the call is documented, it is important that the notes be:

- ✓ Clear and legible
- ✓ Well-organized (using standard fields)
- ✓ Accessible (to other members of the Help Desk)

Managing the Problem

Problem management is obviously the Help Desk's core activity.

Whatever the tools and resources used to implement problem management, the basic process of receiving a call, resolving the problem and verifying the solution remains much the same.

Log and Document Problem Requests

On receiving the request (whether it is a call, e-mail or face-to-face contact), acknowledge the request and set expectations.

For example, repeat the request back to the customer, then state the next steps, such as "I have assigned this problem to x (person or department). If you don't hear from us by (specific) time, please feel free to call me".

The course of action that you agree must be realistic and achievable.

Each request must be logged so that progress on resolving it can be documented. A documented call:

- ✓ Provides an audit trail of the problem
- ✓ Gives information on how many times a problem occurs
- ✓ Gives information on how many times a particular customer calls the Help Desk

Most Help Desks use a Call Management or Problem Management System for this. At the very least, calls must be logged in an electronic database, in order to have a complete history of problems and solutions.

Resolve the Request

If possible, the request should be resolved in one call. If this is not possible, the call can be escalated. What is important is that you drive problem acceptance and resolution, either by working on a solution yourself, or ensuring that the problem is accepted by the assigned person or department (see "Call Escalation" and "Ownership" below).

Inform Customer of Progress and Status

Note	***A customer should not feel the need to call you to find out what's happening – which reduces incoming calls.***

If a problem cannot be resolved within the course of a single call, it is imperative to manage the customer's expectations of when the problem will be resolved. Customers should not feel the need to call you to find out what's happening. This is irritating for them to do and means time is wasted dealing with an unnecessary call.

An progress report should include:

- ✓ Current status
- ✓ Next steps
- ✓ Probable time frame

Agree when to respond next (either with a call or by e-mail) at a scheduled time (even if there is nothing new to report, the customer then feels you are actually dealing with their problem).

Communicate Completion

When the customer has expressed satisfaction with the resolution of the problem, log the problem as closed.

Record the solution and send verification to the customer via e-mail or phone call.

Follow Up On Reported Problem

It is important to ensure that the resolution of the problem has been effective. The ownership of this task generally lies with the analyst who took the call in the first place.

Follow up calls or e-mails indicate good customer service. They are particularly appropriate where a problem has been particularly difficult or protracted and where it is not clear that the problem has been resolved satisfactorily. On the other hand, follow up calls should not be intrusive or they may irritate.

Call Escalation

There will be times when you are unable to resolve the customer's Help Desk enquiry using the resources at your immediate disposal (that is, within the Help Desk team).

There may also be times where the customer can obtain support directly from the manufacturer of the item in question (but, remember, even if the manufacturer does offer free of charge direct support, if your customer has an agreed contract with *your* organization then it is up to the Help Desk to deal with the enquiry).

There is no shame in admitting to the customer that you are unable to answer their enquiry ***provided*** *that you escalate the problem correctly and see the enquiry through to a close.*

Escalation is also referred to as "Elevation". Sometimes either of these terms are used to mean making a call higher priority.

When to Escalate a Call

You may find yourself in a situation where you need to refer your call to the Help Desk manager/supervisor; for example, if the customer becomes difficult or abusive or begins to raise other, company-wide issues. As soon as you run into problems resolving a customer's enquiry, you should immediately take steps to identify your next source of assistance. Other examples could include:

- ✓ Customer requests it or wants to speak to a manager
- ✓ The problem impacts the business
- ✓ It is a personnel issue (for example a Senior Level Manager or Executive is affected)
- ✓ No apparent solution
- ✓ More than one person is affected
- ✓ More than one department is affected
- ✓ The problem has reached its time limit for resolution according to the SLA

Note	***The general rule for escalation is if you can't deal with it find someone who can!***

You should also remember to check the level of response (if relevant) guaranteed to the customer and get back to them within the time stated. It is so easy to become engrossed in finding a solution that you forget to keep in touch with the customer!

Help Desk Call Escalation Routes

Some of the alternatives for call escalation include:

- ✓ Senior staff within the Help Desk
- ✓ Knowledge Experts/technical staff within the Help Desk
- ✓ Customer services (product returns for example)
- ✓ Suppliers and manufacturers
- ✓ Other support contractors/consultants

Installation problems

If the customer is having problems installing a new piece of software or hardware then the levels of support offered may depend upon the current contract that the customer has with the Help Desk.

Items covered by a contract or service level agreement

If the customer has paid for support or is entitled to support as part of an ongoing contract then the Help Desk is bound to support their efforts.

If, however, it becomes apparent that the customer is following the instructions correctly then it should be possible to refer the matter to the item's suppliers or manufacturers *with the Help Desk managing the call through to a resolution* - do not just 'dump' the customer onto another support agent - always maintain contact to ensure that the matter is dealt with to the customer's satisfaction.

Items NOT covered by a contract or service level agreement

If the customer has bought an 'unsupported' item from your organization, or if someone has called your internal Help Desk about an item they have just bought that is not on the 'supported' or 'company standard' list, first establish whether the installation problem can be quickly resolved. If not, as above, refer the matter to the item's suppliers or manufacturers for further assistance.

Your Help Desk may or may not maintain a logged call for such an enquiry. It is probably prudent to do so as the log reporting system will identify when the number of 'unsupported' items being presented to the Help Desk is becoming excessive.

Third party contractors

Utilizing third party contractors can be one way of 'bulking out' the range of skills carried by the Help Desk. You may be able to refer some of your calls directly to a third party agent for immediate attention but, in the case of an internal Help Desk, it is more common to bring in the external party to assist with the general running of the Help Desk and to cover planned, scheduled Help

Desk operations such as the roll-out of new computer equipment or new network cabling. In this respect, the Help Desk is acting as a service broker for its customers.

Specialist companies and 'consultants'

One useful source of 'backup support' is to use independent specialists - either third party companies or persons that work with a very specific range of products and therefore know them 'inside out'.

Such third-party support services can be bought in on an 'as- needed' basis which keeps down the costs of running the Help Desk by avoiding the need for having a full time specialist on the staff payroll.

Most major software and hardware companies have registration schemes for specialist consultants or companies and will be happy to recommend one to help with your specific problems. Some product specialists also advertise in the national computer press, on the Internet and in the Yellow Pages.

If your Help Desk decides to use third-party, support then the following guidelines should be noted:

- ✓ Expect to pay a subscription for support to a guaranteed level (if you need the third party support company to work to an agreed Service Level Agreement).
- ✓ Make sure that a non-disclosure agreement is signed to protect your interests.
- ✓ Make sure that the third party signs a non-approach agreement to dissuade them from contacting your customers without the knowledge of the Help Desk (this is not so much of a problem if you run an internal Help Desk).
- ✓ Ask for references before using a third party support organization or person.

- ✓ Maintain control of the operation of the third party Help Desk - for example, arrange for regular call log and performance reports to be submitted.

Call Escalation Procedure

The key points to remember when escalating a call can be summarized as follows:

1) Identify as soon as possible the need to escalate a call.
2) Pass on as much detail as possible.
3) Obtain an estimate of likely 'time to fix'.
4) Stay in control of the logged call - maintain dialogue with the customer.

Do not close the call until the customer agrees.

Ownership

Ownership is the problem of who is responsible for the logged call if the problem is escalated.

There are two types of ownership to consider: ***actual*** and ***perceived***.

Actual ownership

The person who is dealing with the problem; if you have escalated it to someone else, they have ownership.

Perceived ownership

As you initially took the call, your customer perceives that you have ownership even though you may be handing ownership to another level or area of expertise. So the customer expects you to keep in touch with them and keep them informed at each phase of the problem-solving process.

Managing ownership

A call management system in which calls or tasks can be assigned and which can prompt the user with reminders automatically is a great help in managing the complexity of having more than one person work on a support call.

When escalating the call, you must provide the customer with a reasonable time frame of ***response***. This does not have to be the time when the problem will be fixed, but the time when they can next expect to hear from the Help Desk.

The most important thing is for the customer to be contacted within the agreed time frame. The procedures for the Help Desk should set out a process for ensuring that this happens (for example, recording contact in a management application).

It is good practice for the Help Desk to contact the customer after the first call both because of the positive impression it creates and because it is better to encourage clients not to make "progress report" calls, as these waste analysts' time.

However, a client may prefer to telephone to find out the status of a problem (for example, if they are uncertain of how they can be contacted within the time period specified).

Formative assessment 8

Time Management

Time is an invaluable factor on the Help Desk because workload usually outweighs staff resources. Some of the metrics you may use will be ones that measure time in some way. Time management practices impact the level of service you are able to provide to your customers.

Assigning Call Priorities

Anybody who calls a Help Desk will hope that their problem can be resolved immediately. However this is not always possible for a number of reasons and the customer's idea of an 'acceptable response time' vary greatly from your own.

Assigning a priority can depend upon several factors, not all of them representing best practice...

- ✓ Your understanding of the severity of the problem
- ✓ The seniority of the (internal) customer
- ✓ The amount of money paid for support by the (external) customer
- ✓ How well you like the customer
- ✓ How much the customer yells at you
- ✓ How able you feel to resolve the problem
- ✓ How 'easy' the problem is to resolve

A formal Help Desk management system will usually allow a priority code to be assigned to a call. The code will give the speed of response that a person will receive to their enquiry based upon the *perceived impact of the enquiry/problem* upon their ability to perform their job.

In the absence of any other priority scheme, the following might be considered. You can suggest a suitable 'time to fix' based upon your customers' expectations.

Priority	Impact	"Time to Fix"
A	Complete failure of hardware/software causing serious business impact.	
B	Partial/intermittent failure of hardware or equipment functionality causing work disruption	
C	No immediate business impact. Problem can be 'worked around' but a permanent fix required.	
D	Request for information	

Summary

- ✓ Determine the priority based on the impact of downtime on different customers.
- ✓ Priorities must be established using service level agreements, including input from your customer base, to prevent backlash from customers. This may be determined by whether or not there is a loss of revenue.
- ✓ Impact must be distinguished by types - for example, department or company work stoppage (for example, a downed network), individual work stoppage, individual inconvenience, and so on.
- ✓ Some customers have priority because of their status (for example, senior-level executives), while other have priority because of the importance of the project they are working on.
- ✓ Keep in mind that not all problems are equal.

Formative assessment 9

Quality Assurance

It is all very well offering a call centre service - but is it a *good* call centre service?

- ✓ Are your customers satisfied with the level of service they are being offered?
- ✓ Is the Help Desk working within the requirements of the customers' Service Level Agreements and Service Standards?
- ✓ Are you satisfied with the service you are offering?
- ✓ How can you improve your service to make it better than your competitors?

A reputation for consistent and quality service keeps existing customers and wins new ones. A system of quality assurance, setting performance targets and using metrics to analyze performance maintains and improves the level of customer care offered.

To some extent, quality of service has to be balanced against the cost charged for the service. It is all very well meeting 100% of your performance targets if your competitors are meeting 90% of their targets and charging 10% less.

It is necessary to balance the 'ideal' against commercial reality. The best approach is to 'weight' the Help Desk response times in favor of the issues that impact the most upon the customer's ability to perform their work. Service Level Agreements are usually weighted in this way.

A typical 'guaranteed response' scale (taken from a real Service Level Agreement):

Priority A call clearance >90%

Priority B call clearance >85%

Priority C call clearance >80%

Priority D call clearance >75%

The commercial justification for such a weighting is that general enquiries do not normally impact upon a customer's ability to do their job and so a small degree of slippage on their response times will be acceptable if it allows the Help Desk to offer a much better response to more urgent issues.

Using Metrics

Metrics are measurements of performance based on statistics. These are used for improving business procedures.

Key Performance Indicators (KPI) used include:

- ✓ Quantity measures the total number of calls handled over a specific period, as well as the percentage of customers that hang up before their call is taken; referred to as Abandonment Rate (ABA).
- ✓ Quality measures the percentage of calls that are resolved during the first call; sometimes referred to as One Call Resolution (OCR).
- ✓ Cost is measured as the relationship between the cost of running the Help Desk against the cost of the lost working time of the customers. For lost external customers this will also include loss of business income.
- ✓ Time measures the average time it takes to answer a call from the queue, or Average Speed of Answer (ASA). This measurement can be misleading, as it does not include how long the customer has taken to get to the queue in the first place!

As these are statistical measurements only, they do not measure customer satisfaction. Customer satisfaction is a feeling and depends upon perceptions of service, which cannot be determined by metrics alone.

However, if for example you are seeing a high ABA and low ASA, you could be giving customers a poor indication of the overall quality of your service before they even get to speak to you!

Appraising Quality of Service

Having established agreed Help Desk targets, they should be regularly appraised to make sure they are working properly.

Weekly figures will identify any problems that require immediate attention, and long-term trends - observed over a period of 4-8 weeks - will identify whether the Help Desk is adequately trained and staffed to deal with a typical workload (including the inevitable, occasional 'crisis').

If the Help Desk finds it very easy to meet its targets

- ✓ The Help Desk may be working to the best of its ability.
- ✓ The targets may be too low - your customers may find your service 'adequate' but not 'exceptional'. Tighten the targets to aim for an improved response and re-appraise the situation in a month. Setting 'generous' targets can lead to complacency about the effectiveness of the Help Desk.
- ✓ The Help Desk might be over-staffed. This affects the cost of running the Help Desk and your customer charges will reflect this.

If the Help Desk finds it difficult to meet its targets

- ✓ The Help Desk may have set unrealistic targets – being keen is one thing but if the team is constantly failing to meet its response levels it may start to upset, or even lose, its customers.

In this case re-appraise the targets; if, however, the targets have been agreed with the customer then they *must* be achieved...

Note	***Setting unrealistic targets leads to de-motivation because the Help Desk team feels unable to meet them whatever they do.***

- The Help Desk may not be working efficiently or effectively

Observe the general working of the Help Desk to identify any problem areas

- ✓ The Help Desk may be under staffed.
- ✓ The Help Desk team may not have the required skill sets to deal with their workload.
- ✓ Find out which type of call is causing the most problems in reaching the stated targets and identify why this is so. Take appropriate action.

Customer appraisal of Help Desk targets

Providing your contract customers with monthly reports on Help Desk performance is not only a courtesy but it allows the Help Desk to work with its customer to improve its levels of service and develop a good business relationship.

It may also be necessary to have a monthly meeting with the customer to discuss the figures - but do give the customer a copy of the data a few days in advance so they have time to study it before the meeting.

Help Desk targets are normally included within the customer Service Level Agreements and so the customer should (and will expect) to be involved in appraising the effectiveness of the Help Desk.

Metrics

1) In pairs, discuss the following metrics and identify the likely perception of customers, note what assumptions you have to make as these should be checked out with the customers on your customer satisfaction surveys (Take 10 minutes).

1. High ABA	High OCR	High ASA
2. High ABA	High OCR	Low ASA
2. High ABA	Low OCR	Low ASA
4. Low ABA	Low OCR	Low ASA
5. Low ABA	Low OCR	High ASA
6. Low ABA	High OCR	High ASA

Other Quality Assurance Procedures

We know that metrics alone cannot determine your customer's perception of you. In order to monitor and maintain the agreed service level, there are other methods we can use.

Call Monitoring

Quality assurance by maintaining consistency in call etiquette. Call monitoring allows quality assurance that customers are receiving courteous and friendly service as well as keeping abusive customers in check by letting them know in the outgoing message that their call may be monitored.

There are other benefits to call monitoring as well, such as instant feedback for a job well done, or instant praise for handling a difficult customer well, training new advisors, coaching...

Different mechanisms for call monitoring include: Side-by-side; Remote service observation; Call recording; Reviews of support online and instant communications.

Call or Ticket Monitoring

Quality of service assurance for the customer and the organization. Problem logs must be reviewed periodically to ensure that no call or ticket has been open for an unreasonable amount of time, and no sensitive issues have been raised.

The main benefit is that issues can be dealt with proactively rather than reactively. Mechanisms for ticket monitoring include: remote service; observation; screen capture; and monitoring of online and instant communications.

Round Tables

Team meetings and inter-team meetings to address issues.

Focus Groups

Small groups that are brought together with a common goal, such as determining ways to handle the expected high call volume during a new application implementation.

How is call monitoring best implemented without causing stress in the workplace?

- ✓ To be told what is done well as well as required improvements
- ✓ For accurate feedback which is immediate and helpful
- ✓ To give information about the behaviour, not the person (that is, what you said rather than what you are)
- ✓ To give specific examples, not general ideas
- ✓ To provide observations, not inferences
- ✓ Reports the feelings and consequences of the behaviour
- ✓ Can be well-timed
- ✓ The opportunity to provide positive feedback is just as valuable as 'negative'
- ✓ Can be an opportunity for you to recognize the skills that you have and to build on them
- ✓ Can be an opportunity for you to recognize the skills that you don't have, and to increase your repertoire in order to adapt your skills

Measuring Customer Satisfaction

Customer satisfaction can be determined through feedback such as call monitoring and customer surveys but make sure they contain the answers which will help you to determine performance rather than a list of complaints.

Formal

- ✓ Questionnaires
- ✓ Surveys
- ✓ Evaluation forms

Informal

- ✓ Personal telephone calls with logged response
- ✓ Personal e-mails with saved response

Customer Satisfaction Surveys

Unfortunately many call centres do not conduct satisfaction surveys. Those who do conduct them do so only when they have been getting customer complaints or by management directive.

This is most demoralizing for the Help Desk Analyst who only gets feedback when something is wrong!

Surveys should become a regular part of your quality assurance program, in order to provide motivation for staff when they are doing a good job as well as feedback on what to change if customers are unhappy.

Commonly used surveys include:

- ✓ One-time surveys, which are only appropriate for evaluating current satisfaction levels with current service offerings, and changes that clients/customers would like.
- ✓ Ongoing surveys which track trends in satisfaction with current services. There are various media for conducting these, such as e-mail, web, phone, and written.

Who to survey

- ✓ Make sure that the survey covers all agents
- ✓ Survey a cross-section of customers

When to survey

- ✓ Survey on a regular basis
- ✓ Survey immediately after they have used the service

Annual surveys are similar to the one-time surveys, in that they provide an opportunity for customers to provide input to services and changes desired. If timed correctly can become a part of the annual budget cycle.

How to survey

- ✓ Make it easy for customers to reply
- ✓ Provide balanced feedback to all customers and all staff from the survey

Designing a customer satisfaction survey

Design a customer satisfaction survey to measure a client's response to the last time that they made a support call.

Formative assessment 10

Entrepreneurial opportunities

Whether you are working in an inbound or outbound call centre, there is always an opportunity to improve the sales of your organisation. It is important, when you have a client on the line, to also discuss new products, special offers, promotions and discounts.

This is one of the reasons why you must always keep up to date with what is happening in your industry and in your organisation.

While you have the customer on the line and once the customer's query or problem has been resolved, take the opportunity to adivse the customer about other products s/he may be interested in, new products, special offers, etc.

The customer will not know if someone does not tell him/her!

Appendix D: Sample Service Level Agreement

This sample SLA is for ***guidance only*** and it is not intended to be a 'model' for a working SLA, but to highlight the principal contents of such a document. Professional advice should be sought when drafting a formal SLA.

Service Level Agreement

Between

Our Help Desk Company Ltd (OHC) And

The Customer's Company Ltd (TCC)

Scope of the Service Level Agreement (SLA)

This SLA is intended to cover all aspects of the service (the 'Service') provided by Our Help Desk Company Ltd ('OHC') to The Customer's Company Ltd ('TCC') under The Help Desk Support Contract commencing xxx xxx xxx.

'This SLA should be read in conjunction with The Help Desk Support Contract ('The Contract') dated xxx xxx xxx. All Terms and Conditions of the Agreement shall apply to this SLA unless expressly specified to the contrary. In the event of conflict between the Agreement and this SLA, the provisions of the SLA shall prevail.

Purpose of this SLA

The purpose of this SLA is to provide information to both parties so that: The levels of Service to be offered by OHC to TCC are quantified

OHC's level of Service in fulfilling The Contract can be measured.

This SLA does not form part of the contractual agreement between OHC and

TCC and may be updated as required to account for changes in the levels of service required. Regular meetings will be held to discuss amendments to this

SLA and no amendments will be binding unless agreed in writing by both

parties.

SLA Period

This SLA will remain valid from xxxx until xxxx whereupon it will be automatically renewed unless either party agrees to its termination.

Early termination of this SLA can be effected by mutual written agreement at

any time.

Location of Equipment and support offered

OHC will support the hardware and software currently located at TCC's main plant at Little Dumberley, North Eshire in accordance with the attached schedule of *Supported Hardware and Software.*

The Service offered is summarized as follows:

- Management of the 3 PC network servers, their operating systems, attached printers, CD-ROM units tape units and uninterruptible power supplies.
- Management of the 220 PC workstations, applications software and attached printers.
- Management of the PC network cabling systems and associated networking equipment.

The Service does not include

- The supply of hardware or software, hardware maintenance, disaster recovery facilities, office equipment and

supplies, consumables or user training.

Service Review

During the period of the Agreement, service review meetings will be held approximately every two months. The meetings will be held between the OHC ***Support Service Manager*** (who will chair and document the meeting) and the **OHC *Technical Support Manager***. Other representatives from either side may attend, with prior notice, as required.

A meeting agenda will be generated and distributed at least one week before the Meeting.

Customer responsibilities

The customer will endeavour to:

- Provide a schedule of projected work loads for the service to be provided. The schedule should be updated regularly to allow planning for future capacity.
- Give advanced notification of internal changes which could affect the OHC service.
- Give notification of personnel changes affecting contact points.

Escalation Procedures

The OHC *Support Service Manager* will be notified immediately when a particular service level has been breached.

Call Reception

Calls will be logged into a system which will record who made the call, a problem/enquiry summary, the date and time of call and the priority agreed with user.

The 'OHC Help Desk' will attempt an immediate resolution of the call, but if this is not achieved will allocate a person to take responsibility for resolving the problem/enquiry.

The 'OHC Help Desk' will be responsible for progress chasing the problem/enquiry, feed-back to the caller and closing and recording actions taken on the system.

The 'OHC Help Desk' will be responsible for tracking the problem through to satisfactory completion. If the originator of the Help Desk call is not satisfied with the progress of a call or the response offered, they should first contact the OHC Support Service Manager.

Service levels

Help Desk Service

Operating hours: 08.30 - 18.00 Monday - Friday excl. bank holidays

Maximum calls logged/month : 800

Response targets

Priority A call clearance < 4hrs : >90% Priority B call clearance < 8hrs : >80%

Priority C call clearance < 3 days : >75%

Server availability (06:00 - 18:00): >98%

Supported Hardware and Software

Software

MicroStart DOS V3.3 to V6.x

MicroStart Curtains V3.x, Curtains 95 and Curtains NS Workstation

WareNet TN network operating system.

MicroPerfectPro applications software suite

All other PC software not listed is unsupported

Hardware

PC Servers

3-off PH Supaserva Pentium 166, 64Mb RAM, 2Gb Disk, 8GB DAT Tape streamer

Network equipment

All network infrastructure cabling as installed on xxx xxx xxx and as upgraded to a maximum of 250 points

22-off Baycom 12-port UTP network hubs

Contact Points

OHC

Help Desk

Office Hours	01234 567 8900
Fax	01234 567 8901
Out of Hours	01234 567 8999
Pager	01111 123 3212

Support Service Manager

Office Hours	01234 567 8989

TCC

Technical Support Manager

Office Hours	01999 220 2222 Ext. 3233

Rebates

Should OHC meet or exceed the response targets for Priority A and B Call Clearance for 95% or more of calls, measured over each calendar month, then the service fee remains unchanged. However, should the service fall below

95% of the agreed target, then the rebates listed below will be applied to the subsequent contract invoice for each service level breached.

Percentage of target achieved	Rebate
95% - 100.00%	0%
94% - 94.99%	3.00%
93% - 93.99%	4.00%
92% - 92.99%	5.00%
91% - 91.99%	6.00%
90% - 90.99%	7.00%
89% - 89.99%	8.50%
88% - 88.99%	10.00%
87% - 87.99%	12.00%
86% - 86.99%	13.00%
85% - 85.99%	15.5% (Max)

Signatories

Signed for and on behalf of OHC

Name: _____ Signature: _____

Title: _____ Date: _____

Signed for and on behalf of TCC

Name: _____ Signature: _____

Title: _____ Date: _____

FORMATIVE ASSESSMENTS WORKBOOK

Formative assessment 1

The role of the Help Desk

You have been given a pad of yellow sticky notes; use a separate page for each idea. This exercise is to be completed by yourself. You have 10 minutes to write down as many responses as possible to answer the following questions:

1) What is the Help Desk expected to do?
2) What standards are expected by the company?
3) What is expected by the callers?

Formative assessment 2

Review: The Role of the Help Desk Analyst

In your group, take 10 minutes to write down as many thoughts as possible to answer the following questions. Use a separate yellow sticky page for each idea.

1) What is the Help Desk Analyst employed to do?
2) What knowledge does the support analyst require?
3) What state of mind does the support analyst require?
4) What are the main attributes of a successful support analyst?

It is important to note at this stage that the job can be learned, but the personality must be developed, in other words, you have to want to do the job before you can be successful

Formative assessment 3

Refer to the SLA in the appendix and discuss the following in groups:

- ✓ What are the relevant service levels that are required?
- ✓ What is the purpose of the different service levels?
- ✓ List and describe the requirements of the service levels in terms of the following:
  - management
  - information systems
  - information on systems
  - shift changes

Formative assessment 4

In groups, discuss the following regarding an inbound call centre for a retail store where information about products, branches, services and complaints are given.

- ✓ What are the relevant service levels that are required?

- ✓ What is the purpose of the different service levels?
- ✓ List and describe the requirements of the service levels in terms of the following:
  - management
  - information systems
  - information on systems and wall-boards (remember that retail stores have special offers on a regular basis)
  - shift changes
  - abandoned rates
  - Average Speed to Answer
  - Turn Around Time

Formative Assessment 5

1. Which button do you press to start your computer?
2. Explain what a cold start is.
3. Explain what a warm start is.
4. List and explain the most common errors that can be experienced during the start up procedure.
5. How would you fix these errors?
6. When would you use the restart option in the shut down menu?
7. When will the computer give you the option of starting is safe mode?
8. Should you turn off your computer when either of the following messages displays?

Windows is Shutting Down, or Please Wait while Windows Shuts Down.

Formative Assessment 6

- ✓ Start Word and identify the following screen elements: Title bar, Menu bar, Standard toolbar, Formatting toolbar, Type a Question box, Status bar, Scroll bars, Task Pane Point to the New Blank Document button on the Standard toolbar to display its ScreenTip
- ✓ Point to other buttons on both the Standard and Formatting toolbars to display more tips
- ✓ Display the Standard and Formatting toolbars on two rows
- ✓ Point to the Standard toolbar, then click the right mouse button
- ✓ From the shortcut menu, select Outlining
- ✓ The Outlining toolbar is displayed.
- ✓ If the toolbar is attached to the window, click-and-drag its move handle to position it in the middle of the screen
- ✓ Click-and-drag the Outlining toolbar's move handle to position the toolbar on the lefthand side of the Word window
- ✓ Right-click the Outlining toolbar and select Outlining to hide the toolbar
- ✓ Pull down the File menu
- ✓ Pull down other menus using the mouse and keyboard
- ✓ Pull down the Insert menu, then the AutoText option to display the submenu and open and close further submenus using the mouse and keyboard
- ✓ Cancel the menu
- ✓ Set up Word to show full menus
- ✓ Click on the Styles and Formatting button on the Formatting toolbar to toggle the task pane on and off, leaving it on
- ✓ Open different task panes using the down arrow on the task pane title bar
- ✓ From the View menu, close the task pane
- ✓ Exit Word then restart

Formative assessment 7

- ✓ Save your document as practice followed by your name.
- ✓ Close the document
- ✓ Exit MS Word
- ✓ Open MS Word
- ✓ Find your document and open it

Formative assessment 8

Time Management On The Help Desk

For each question, tick the box which is most like you.

Questions	Always	Usually	Sometimes	Seldom	Almost Never	Score
I know when I wake up in the morning what my two or three priority tasks are for the day.						
I accomplish my two or three priority tasks.						
I complete all calls by the deadline.						
I monitor my staff to make sure that they can complete their calls by the call deadline.						
I do not deal with calls that a subordinate can deal with.						
I allow no unauthorized interruptions to each call .						
I return and follow up calls when I say I will.						
Day to day the work I do reflects and supports my team and my goals.						
					Total Score	

Scoring

- ✓ 2 points for each "always"
- ✓ 4 points for each "usually"
- ✓ 6 points for each "sometimes"
- ✓ 8 points for each "seldom"
- ✓ 10 points for each "almost never"

Interpretation of your Scores:

- ✓ Score of 20-46: You are essentially in control.
- ✓ Score of 47-79: You are racing against the clock. Greater control is advisable. Make sure that you are not taking work from others, do your own job!
- ✓ Score of 80-100: You are on a treadmill. Restructuring time and work habits is vital to productivity. You may need to take this up with a manager.

Formative assessment 9

Assigning call priorities

Assign priorities to the following calls (use the A, B, C, D rankings from above) and briefly outline your reasoning.

If you wish, you may assume additional background information about the call/scenario.

1) *"My printer won't print pound signs"*

Priority:

Reasoning:

2) *"Have you got a Windows graphics driver disk for a Diamond Matrox graphics card?"*

Priority:

Reasoning:

3) *"What's your fax number?"*

Priority:

Reasoning:

4) *"My monitor is starting to smoke"*

Priority:

Reasoning:

5) *"My new Travan tape drive has arrived but there's no manual"*

Priority:

Reasoning:

6) "Every time I exit from Windows, my PC crashes and I have to reboot"

Priority:

Reasoning:

Assigning priorities discussion

1) Think of a problem that you have encountered recently.
2) Give a brief description to your group and see whether you consider their priority level to be acceptable.
3) Ask questions about each problem in order to assess their response.

Formative assessment 10

In groups, discuss the SLA in the appendix and explain how to:

- ✓ Implement company specific service levels for this SLA
- ✓ How implementation processes will be monitored to ensure compliance
- ✓ How to ensure and measure whether service level timeframes and targets are consistently met
- ✓ Identify potential constraints that would make it difficult for you to meet and maintain service levels. Remember to consider power outages and power sharing, strikes, theft of telephone cables making it difficult to make and receive telephone calls, etc.

Discuss an inbound call centre of your choice using the same headings.

Discuss an outbound call centre using the same headings.