

Help Desk Institute®

Official Curriculum



Help Desk Manager (HDM) Certification Standards



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HDM Certification Standards

INTRODUCTION

This document contains HDI's Help Desk Manager (HDM) Certification Standards. It provides the information, requirements, and guidance necessary for test creators, curriculum developers, test takers, and test administrators.

Methodology

The competencies for each of the HDI Certifications were identified and approved by the HDI International Individual Certification Committee. It is the committee's intent to recognize the breadth of knowledge required, document the needed skills, and provide leadership to the industry on the meaning of a certification in customer services and technical support.

The HDI Certification is an open certification that is independent of any training curriculum. HDI Certification objectives are published to allow any organization or individual to develop a curriculum that will enable individuals to pass the exam, which is independently administered. HDI is the administrator, facilitator and arbitrator of the standards.

Help Desk Manager Certification Objectives

HDI's HDM Certification recognizes an individual's knowledge of the competency requirements and skills required to be a manager in a Support Center. A person who passes the HDM Certification exam can be expected to:

- Recognize the strategic role of the Support Center
- Identify the necessary management skills for a Support Center manager
- Identify the purpose of business alignment in the Support Center
- Identify operational management strategies for the Support Center
- Identify technology management strategies for the Support Center
- Recognize the skills necessary for human resource and team development

Objective	Title	Weighting %
1	The Strategic Role of the Support Center	15
2	Management Skills	10
3	Business Alignment	15
4	Operational Management	35
5	Technology Management	10
6	Human Resource and Team Development	15
	Total	100%



Certification Structure and Weightings:

Name of the Certification:

HDI's Certified Help Desk Manager (HDM)

- CSS is the acronym that is used for the Customer Support Specialist
- HDA is the acronym that is used for the Help Desk Analyst
- HDM is the acronym that is used for the Help Desk Manager

Target Demographics and Prerequisites

HDI's HDM exam and training material are aimed at individuals who have one to three years of management experience in the support profession. Examples of professional job titles include:

- Supervisor I, II, and III
- Manager I, II, and III
- Senior Manager

HDI expects that individuals interested in obtaining this certification will mirror HDI's membership demographics. Test takers will come from various industry sectors and a range of large, medium, and small sized Support Centers. The one thing that all of the test takers will have in common is a desire to be recognized for demonstrating an understanding of the important topics listed in these standards in order to pursue employment and advancement opportunities in the support industry.

Prerequisites for passing the certification exam will be a working and comprehensive understanding of the professional demands placed on a Support Center manager, the standard process requirements for most Support Center operations, and the technology available to all Support Centers. Individuals should not attempt certification unless they have worked in the support industry for three to five years and have a working knowledge of the concepts below or have successfully completed certification preparation course work and have a strong desire to work in the customer support profession.



HDM Certification Standards

THE STRATEGIC ROLE OF THE SUPPORT CENTER

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Support Center Services	<i>Identify the responsibilities of the Support Center</i>	<p>The Support Center is responsible for:</p> <ul style="list-style-type: none"> ■ Satisfying the customer while following the guidelines of the organization ■ Interacting with the customer in a respectful, courteous, and positive manner ■ Maintaining open communication ■ Managing expectations ■ Recognizing the needs, requirements, and demands of the business ■ Representing the service provider to the customer
	<i>Identify sources for knowledge of the support industry</i>	<p>Knowledge of the support industry can be gained from the following sources:</p> <ul style="list-style-type: none"> ■ HDI ■ Web sites ■ Reference material ■ Benchmarking ■ Industry publications
	<i>List the phases in the evolution of Support Center services</i>	<p>The phases in the evolution of Support Center services include:</p> <ul style="list-style-type: none"> ■ Paper based systems ■ Automated call logging and tracking systems ■ Phone based systems: voice and fax ■ Internet and Web based systems ■ Instant messaging (IM) and chat ■ Incident and problem management ■ Change management ■ Release management ■ Customer relationship management ■ Universal queue and universal agent ■ Electronic services: Internet, e-mail, and wireless ■ Customer centric to business centric ■ Self-service, self-healing, and remote access tools and technology
	<i>Describe the Support Centers of today</i>	<p>Support Centers of today:</p> <ul style="list-style-type: none"> ■ Focus on supporting the organization's business needs ■ Use key performance indicators (KPI) to align the Support Center with the organization ■ Recognize that support skills include more than just technical ability ■ Are a strategic asset to the organization ■ Strive to maintain consistency ■ Improve organizational productivity ■ Reduce costs ■ Increase return on investment (ROI)
	<i>Describe the role of Support Center services</i>	<p>The role of Support Center services is to:</p> <ul style="list-style-type: none"> ■ Serve as single point of contact (SPOC) for the customer ■ Measure and report performance ■ Be a strategic asset to the organization ■ Provide customer and/or technical assistance services, including: <ul style="list-style-type: none"> ▫ Providing quick, responsive, and consistent service ▫ Acknowledging and recording all incidents and requests ▫ Resolving customer incidents and requests ▫ Referring or escalating unresolved incidents ▫ Monitoring and escalating incidents per the service level agreement (SLA) ■ Document service costs and identify opportunities to reduce the total cost of ownership (TCO) ■ Keep the organization and/or supported client performing at the highest level possible ■ Provide service delivery and service monitoring ■ Balance resource expenses to keep support performing at the highest level possible ■ Provide cost effective services to the organization



THE STRATEGIC ROLE OF THE SUPPORT CENTER

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Personal Development	<i>Identify ways to stay current with support industry developments</i>	Ways to stay current with support industry developments include: <ul style="list-style-type: none"> ■ Attending courses or conferences ■ Subscribing to industry magazines, e-newsletters, and news groups ■ Joining industry related groups ■ Visiting customer sites
Key Support Center Elements	<i>Describe how to leverage personal presence and organizational commitment to inspire and motivate others</i>	Inspire and motivate others by: <ul style="list-style-type: none"> ■ Seeking feedback from trusted peers on personal presence ■ Setting the work ethic example by demonstrating personal commitment ■ Using your personal presence as an opportunity for feedback, support, and mentoring
	<i>Describe the key elements of a successful Support Center</i>	Key elements of a successful Support Center include the following: <ul style="list-style-type: none"> ■ Leadership ■ Policy and strategy ■ People management ■ Resources ■ Process ■ Employee satisfaction ■ Customer satisfaction ■ Performance results ■ Cost effectiveness compared to industry standards
	<i>Identify the benefits of HDI's Support Center Certification (SCC)</i>	HDI's Support Center Certification: <ul style="list-style-type: none"> ■ Ensures adherence to industry best practices ■ Increases employee morale ■ Demonstrates a commitment to quality ■ Increases customer satisfaction
Global Perspective	<i>Recognize ways to understand country and cultural differences</i>	Understand country and cultural differences by: <ul style="list-style-type: none"> ■ Taking a course in international business or cross-cultural studies ■ Reading a book on how to do business with other countries ■ Studying the business practices of successful multinational businesses ■ Visiting other countries
	<i>List options for obtaining language assistance</i>	Options for language assistance include: <ul style="list-style-type: none"> ■ Translation services ■ The Web ■ PC tools ■ Translation applications ■ Interpreters ■ Other Support Center staff ■ Other customers
Shaping Vision and Strategy	<i>Describe ways to create clear, insightful strategies designed to take advantage of business opportunities and align organizational resources</i>	To create clear, insightful strategies: <ul style="list-style-type: none"> ■ Know the organizational competencies of your team and company ■ Network with people in other organizations and within the support industry and your communities ■ Encourage people to push boundaries and challenge the status quo ■ Work with your team to develop future scenarios in which your team is likely to be a player

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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Shaping Vision and Strategy	<i>Identify the activities required to obtain support from critical resources and remove barriers</i>	<p>To obtain support and remove barriers:</p> <ul style="list-style-type: none"> ■ Request that new projects be weighed against the SLA to determine requirements to successfully understand needed involvement, cost, and support for implementation ■ Determine resource requirements to support the Support Center, SLA, and objectives ■ Determine additional support resources required to implement projects and gain buy-in early ■ Determine if additional support will be required and if resources are available ■ Verify that other organizations or teams are supporting the project and have identified it as a goal or objective
	<i>Identify the role of telephone support in a Support Center environment</i>	<p>Telephone support:</p> <ul style="list-style-type: none"> ■ Is the traditional and most common method of Support Center support ■ Typically resolves the majority of problems for customers on the initial contact ■ Can be escalated to deskside support if the incident or request cannot be resolved over the phone ■ Can be used with remote support tools ■ Typically provides Level I and II support
Service Delivery Methods and Practice	<i>Identify the variables that are used when deciding if telephone, deskside, or remote control will be used</i>	<p>The type of support to be used depends on the:</p> <ul style="list-style-type: none"> ■ Type of incident or request ■ Complexity of the incident or request ■ Product or application being supported ■ Stipulations in the SLA ■ Expertise of the onsite Support Center staff ■ Location of the customer ■ Time zones of the customer and Support Center ■ Support Center's hours of operation ■ Impact of the incident or request on the business
	<i>Identify the role of deskside support in a Support Center environment</i>	<p>Deskside support:</p> <ul style="list-style-type: none"> ■ Involves a support professional going to a customer's physical location to respond to an incident or request ■ Is typically used when the incident or request cannot be resolved remotely
	<i>Describe the skill level required for the support professional delivering deskside support</i>	<p>The skill level required for the support professional delivering deskside support includes:</p> <ul style="list-style-type: none"> ■ Medium to high level expertise in PC hardware diagnostics and troubleshooting ■ Medium to high level expertise in PC operating systems ■ General understanding of site-specific network configuration ■ Working knowledge of domain and server configuration issues ■ Exemplary customer service skills
	<i>Identify situations where deskside support is applicable</i>	<p>Deskside support is applicable when:</p> <ul style="list-style-type: none"> ■ A physical presence is required (e.g., hardware failure or replacement) ■ It is stipulated by the SLA ■ It improves the productivity of the Support Center ■ Telephone and remote support are not effective or applicable
	<i>Identify the benefits of using deskside support</i>	<p>The benefits of using deskside support include:</p> <ul style="list-style-type: none"> ■ Allowing one-to-one or face-to-face communication with the customer to establish a rapport ■ Being able to view the environment from the customer's perspective



THE STRATEGIC ROLE OF THE SUPPORT CENTER

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Service Delivery Methods and Practice	<i>Identify the role of remote control in a Support Center environment</i>	<p>Remote control:</p> <ul style="list-style-type: none"> ■ Is a set of tools, technologies, and processes that facilitate the resolution of customer incidents and requests remotely ■ Eliminates or significantly reduces the requirement for deskside support ■ Is used to support how-to questions, configuration issues, etc.
	<i>Identify the benefits of using remote control</i>	<p>The benefits of using remote control include:</p> <ul style="list-style-type: none"> ■ Allowing the Support Center to view and take control of the customer's workstation ■ Allowing the analyst to see what the customer sees ■ Allowing the customer to watch and learn how the analyst solves problems ■ Reducing resolution times ■ Enabling the analyst to train customers how to resolve simple incidents and requests ■ Lowering support costs
	<i>Recognize the limitations of remote support tools</i>	<p>The limitations of remote support tools include:</p> <ul style="list-style-type: none"> ■ Tools can be complex ■ Tools may require infrastructure improvements ■ Customers may be concerned about security issues
	<i>Describe the role of chat and instant messaging (IM) in a Support Center environment</i>	<p>Chat and instant messaging:</p> <ul style="list-style-type: none"> ■ Enable communication with customers and Support Center staff ■ Allow for quick access to in-house experts ■ Enable staff to have private dialogues ■ Allow identified individuals to send messages directly to your computer in real time ■ Link remote workers to home base easily ■ Lower support costs ■ Allow analysts to handle more than one customer at a time
	<i>Describe remote control</i>	<p>Remote control is a tool that allows an analyst to take control of a customer's workstation from a remote location. Remote control is used for troubleshooting, training, updating, and making repairs.</p>
	<i>Identify the advantages of using self-help in a Support Center</i>	<p>The advantages of using self-help in a Support Center include:</p> <ul style="list-style-type: none"> ■ Enabling customers to resolve certain requests without direct HDA interaction or involvement ■ Allowing customers to resolve specific types of requests regardless of whether the Support Center is open or closed ■ Enabling the customer to resolve the request in less time than it would take to wait for a HDA ■ Improving the customer's productivity, effectiveness, and efficiency by utilizing information sources ■ Allowing customers to resolve simple requests (<i>e.g.</i>, status of order, flight arrival time or delay, and bank balance) ■ Permitting Support Center staff to focus on resolving more complex issues with customers

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THE STRATEGIC ROLE OF THE SUPPORT CENTER

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Service Delivery Methods and Practice	<i>Identify uses of self-help technology</i>	<p>Self-help technology can be used to:</p> <ul style="list-style-type: none"> ■ Allow customers to access documentation (e.g., policies, procedures, SLAs, FAQs, etc.) ■ Provide training and online tutorials ■ Facilitate problem solving ■ Allow access to the knowledge base ■ Provide information and updates to customers ■ Notify customers of service outages and upcoming scheduled changes and maintenance ■ Log calls and new requests or incidents ■ Check the status of current requests ■ Update information on current requests ■ Update contact information ■ Reset passwords
	<i>Identify common examples of self-help technology</i>	<p>Examples of self-help technology include:</p> <ul style="list-style-type: none"> ■ Faxback systems ■ Forms ■ Procedures ■ IVR-based systems ■ Web-based self-help systems ■ Specific information about products and services ■ Online help systems for applications ■ Help systems found with most applications
	<i>Identify advantages of self-help technology</i>	<p>The advantages of self-help technology include:</p> <ul style="list-style-type: none"> ■ Allowing for faster problem resolution ■ Providing easy access for the customer ■ Being available 24x7, regardless of the Support Center's operating hours ■ Providing consistent responses to repetitive requests ■ Being the preferred method for some customer segments ■ Lowering the cost of Support Center support
	<i>Identify the characteristics of self-healing tools</i>	<p>Self-healing tools can:</p> <ul style="list-style-type: none"> ■ Identify when a problem has occurred and initiate remedial action ■ Maintain an understanding of the distinct system and desktop profiles ■ Restore or heal a system to a functioning state
	<i>Recognize the types of functions self-healing tools can perform in a Support Center</i>	<p>Self-healing tools can perform the following functions in a Support Center:</p> <ul style="list-style-type: none"> ■ Update registry settings ■ Recognize system corruption and restore the system from a backup ■ Automatically reset applications ■ Run antivirus applications ■ Reset key files every time a user executes an application (e.g., DLL files)



THE STRATEGIC ROLE OF THE SUPPORT CENTER

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Service Ethics	<i>Explain the purpose of a code of conduct</i>	<p>The purpose of a code of conduct is to:</p> <ul style="list-style-type: none"> ■ Ensure that all employees understand what the company expects of them ■ Documents the company's standards of moral and ethical behavior ■ Document the behavior expected of employees ■ Serve as a resource for employees for vague or questionable areas of behavior
	<i>Recognize what is affected by commitments made to customers, team members, and organizations</i>	<p>Making commitments to customers, team members, and organizations affects:</p> <ul style="list-style-type: none"> ■ Credibility ■ Trust ■ Customer satisfaction ■ Employee morale ■ Accountability
	<i>Identify ways to manage multiple demands and competing priorities</i>	<p>Manage multiple demands and competing priorities by:</p> <ul style="list-style-type: none"> ■ Delegating whenever possible ■ Keeping a daily calendar of deadlines ■ Scheduling regular meetings to reassess priorities and demands
	<i>Identify the benefits customers receive when the Support Center follows standard procedures</i>	<p>Following standard procedures:</p> <ul style="list-style-type: none"> ■ Enables faster, more efficient service ■ Makes Support Center activities traceable and allows for the creation of an audit trail ■ Optimizes Support Center resources ■ Minimizes customer interruptions
	<i>Identify typical expectations of customers</i>	<p>Customers expect:</p> <ul style="list-style-type: none"> ■ Quick and responsive service ■ Fair treatment ■ Consistent and courteous service

HDM Certification Standards

MANAGEMENT SKILLS

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Project Management Skills	<i>Identify key behaviors that allow the Support Center to deliver on commitments</i>	The following behaviors allow the Support Center to deliver on commitments: <ul style="list-style-type: none"> ■ Give consistent and constructive feedback to your team ■ Emphasize the need for results, not just activity ■ Convey confidence in the team and match your words with action ■ Show your team how progress is monitored, benchmarked, and corrected ■ Model the attributes of managing the Support Center on a business being run for profitability and customer satisfaction
	<i>Recognize how to anticipate problems, develop contingency plans, and sustain progress</i>	To anticipate problems, develop contingency plans, and sustain progress: <ul style="list-style-type: none"> ■ Segment projects in to phases ■ Analyze each phase of a project to determine areas of risk ■ Determine the criteria for success or failure for each phase of the project ■ Manage the maintenance required to preserve agreed levels of performance ■ Look at trends
Creative Thinking Skills	<i>Describe logical problem solving</i>	Logical problem solving is the ability to organize an incident or problem in to a series of rational, consistent, coherent, and orderly steps.
	<i>Identify the benefits of creative thinking</i>	Creative thinking allows you to: <ul style="list-style-type: none"> ■ Think outside the box ■ Generate more viable options, resulting in more alternatives and backup plans ■ Generate quicker actions under unusual circumstances
	<i>Describe techniques to assist in creative thinking</i>	To assist in creative thinking: <ul style="list-style-type: none"> ■ Change your perspective and look at the situation from the customer's perspective ■ Focus on the real need or the desired end result ■ Assess the risk of using other approaches ■ Take a simple approach
	<i>Describe when it is appropriate to take risks in order to find viable solutions</i>	It is appropriate to take risks in order to find viable solutions when: <ul style="list-style-type: none"> ■ A high degree of effectiveness is likely to be the direct result of taking a risk ■ The risk is not expressly connected to your delivery of service ■ The customer understands that a risk is being taken
	<i>Identify basic critical thinking skill concepts</i>	Critical thinkers: <ul style="list-style-type: none"> ■ Critique in order to redesign, remodel, and make better ■ Recognize that ultimate authority rests with reason and evidence ■ Can listen in order to enter empathetically and analytically into the perspective of others ■ Organize an incident or problem resolution into a series of logical, orderly steps
	<i>Explain the benefits of performing gap analysis as it relates to problem solving</i>	The benefits of performing gap analysis include: <ul style="list-style-type: none"> ■ Assessing the current state of the Support Center and comparing it to the desired state ■ Comparing current practices to best practices ■ Recognizing the difference between cause and effect ■ Producing reports ■ Making informed recommendations



MANAGEMENT SKILLS

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Customer Advocacy Skills	<i>Describe the principles of negotiation</i>	<p>The principles of negotiation include:</p> <ul style="list-style-type: none"> ■ Seeking a win-win solution ■ Determining the customer's underlying need ■ Separating the person from the problem ■ Acknowledging the benefit of the customer's idea, from the customer's perspective ■ Recognizing the customer's emotions ■ Discussing each other's perceptions ■ Receiving participation from all parties ■ Setting objective criteria to measure results ■ Seeking a compromise that is acceptable to all parties
	<i>Identify characteristics of a good negotiator</i>	<p>A good negotiator:</p> <ul style="list-style-type: none"> ■ Solves problems ■ Develops multiple options to choose from ■ Explains concerns about the customer's idea ■ Focuses on what is needed, not how to get there ■ Strives to understand the incident from the customer's point of view ■ Doesn't blame anyone ■ Develops well-planned and realistic commitments
Report Writing and Presentation Skills	<i>Identify considerations for preparing a written management report</i>	<p>When preparing a written management report:</p> <ul style="list-style-type: none"> ■ Determine the purpose and audience for the report ■ Research the issue ■ Collect data ■ Write a first draft ■ Revise the draft for style, grammar, and spelling ■ Write concisely ■ Choose effective wording ■ Be as precise as possible ■ Vary sentence structure ■ Avoid run-on sentences ■ Use the active voice ■ Develop unified and coherent paragraphs ■ Use parallel words and phrases in lists ■ Use a confident, courteous, and sincere tone ■ Avoid abbreviations and acronyms ■ Proofread and check spelling in the document
	<i>Identify the elements necessary to prepare for an effective presentation</i>	<p>To prepare for an effective presentation:</p> <ul style="list-style-type: none"> ■ Use your report writing skills ■ Develop visual aids (e.g., charts, graphs, tables, etc.) ■ Practice aloud for timing and delivery
	<i>List standard types of presentation equipment</i>	<p>Standard types of presentation equipment include:</p> <ul style="list-style-type: none"> ■ Overhead projectors and slides ■ LCD devices ■ Flip charts ■ Whiteboards
	<i>Identify considerations when using presentation media</i>	<p>Things to consider when using presentation media include the:</p> <ul style="list-style-type: none"> ■ Color of the font and the background ■ Content of the presentation ■ Font type and size ■ Item limit per slide ■ Placement of projecting slides (e.g., Are the projecting slides high enough so that the audience in the back of the room can see?)

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MANAGEMENT SKILLS

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Report Writing and Presentation Skills	<i>Identify techniques for getting audience participation</i>	<p>Techniques for getting audience participation include:</p> <ul style="list-style-type: none"> ■ Asking questions designed to elicit a verbal response ■ Asking questions designed to elicit a show of hands ■ Giving the audience a mental picture ■ Asking the audience to create a mental picture ■ Repeating a word or phrase and having the audience repeat the word or phrase back to you
	<i>Describe a briefing</i>	<p>A briefing is:</p> <ul style="list-style-type: none"> ■ A short meeting used to rapidly communicate the status or provide an update on issues appropriate to the audience ■ Typically used to ensure that the incoming staff is fully aware of the ongoing and potential customer issues it may encounter during its shift
Questioning Skills	<i>Identify three information gathering techniques</i>	<p>Three information gathering techniques are:</p> <ul style="list-style-type: none"> ■ One-way ■ Structured ■ Unstructured
	<i>Describe one-way information gathering</i>	<p>In one-way information gathering the customer provides a description of the incident without any interaction with the Support Center via voice mail, e-mail, or fax.</p>
	<i>Describe structured information gathering</i>	<p>In structured information gathering:</p> <ul style="list-style-type: none"> ■ Questions are asked in a predetermined sequence ■ Issues related to an incident are identified ■ The difference between what happened and what the customer expected to happen is identified
	<i>Describe unstructured information gathering</i>	<p>In unstructured information gathering, which is the technique used most commonly in Support Centers:</p> <ul style="list-style-type: none"> ■ Questions are asked in a free-form manner ■ Customers volunteer information
	<i>Describe clarifying questions</i>	<p>Clarifying questions:</p> <ul style="list-style-type: none"> ■ Are used to ensure understanding ■ Are used to uncover hidden information <ul style="list-style-type: none"> ▫ Has this ever happened before? ▫ When was the last time this worked? ■ Need to cover both sides of the situation <ul style="list-style-type: none"> ▫ When does this happen? ▫ When doesn't it happen? ▫ Who is affected? ▫ Who is not affected?



BUSINESS ALIGNMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Strategic Vision	<i>Explain the mission of Support Center services</i>	The mission of Support Center services is to provide high-performing, critical customer and technical assistance services.
	<i>Identify the four phases of the HDI Support Center maturity model</i>	There are four phases in the HDI Support Center maturity model: <ul style="list-style-type: none"> ■ Reactive – Tactical ■ Proactive – Tactical ■ Customer centric – Strategic ■ Business centric – Strategic
	<i>Identify techniques for establishing effective relationships with other parts of the service organization</i>	To establish effective relationships with other parts of the service organization: <ul style="list-style-type: none"> ■ Treat others in your organization as if they were your customer ■ Treat others as you would like to be treated ■ Understand the responsibilities and roles of the other organizations or teams ■ Educate other organizations or teams on the roles and responsibilities of your group or team ■ Do not blame others ■ Focus on the steps necessary to resolve the customer's request ■ Recognize others (individuals, groups, or teams) for their achievements and assistance to customers
	<i>Describe how to build a trusting relationship</i>	To build a trusting relationship: <ul style="list-style-type: none"> ■ Establish credibility ■ Meet your commitments ■ Ensure that your commitments are clearly understood ■ Demonstrate competence ■ Continually strive to improve yourself ■ Strive for mutual respect ■ Respect others' opinions ■ Open communication with team members ■ Avoid hidden agendas ■ Actively listen to others
	<i>Describe ways to take decisive action while managing risks and uncertainties</i>	To take decisive action while managing risks and uncertainties: <ul style="list-style-type: none"> ■ Manage and review time spent to meet or exceed customer expectations ■ Manage strengths, weaknesses, opportunities, and threats ■ Manage programs that reward initiative in improving costs, KPI, and customer satisfaction
	<i>Describe how to stay focused on what is most critical in order to achieve personal and organizational goals</i>	To stay focused on achieving personal and organizational goals: <ul style="list-style-type: none"> ■ Identify three to five critical areas that will determine success ■ Communicate priorities and progress repeatedly ■ Once goals are established, construct a step-by-step plan with benchmarks
	<i>Recognize ways to personally adapt to new situations, priorities, or demands</i>	To adapt to new situations, priorities, or demands: <ul style="list-style-type: none"> ■ Seek an assignment or project outside of your comfort zone ■ Look at an incident within the context of a system or process, rather than as a static event

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BUSINESS ALIGNMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Strategic Vision	<i>Identify the role of the Support Center manager in shaping the business's strategic vision</i>	The role of the Support Center in shaping the business's strategic vision includes: <ul style="list-style-type: none"> ■ Being the eyes and ears of the CIO ■ Gathering information from IT staff ■ Gathering information from customers ■ Participating in enterprise initiatives and cross-functional teams ■ Performing root cause analysis ■ Sharing information with customers and IT staff
	<i>Describe how to develop a clear understanding of an organization's missions, strategies, strengths, weaknesses, and capabilities</i>	To develop a clear understanding an organization's missions, strategies, strengths, weaknesses, and capabilities: <ul style="list-style-type: none"> ■ Interview key stakeholders, customers, and leaders ■ Conduct roundtable meetings with employees ■ Conduct focus groups with customers and partners ■ Review and report SLA/OLA successes and failures regularly ■ Act as a visible manager in championing service processes ■ Review historical successes and failures of the support organization ■ Participate in the creation of IT policies, processes, supporting tools, and roadmaps ■ Determine overlaps from department to department ■ Obtain buy-in from management
	<i>Identify how to use formal and informal networks to accomplish work goals</i>	Before taking action that will affect other departments, discuss the economic, staffing, and organizational ramifications with your manager or other knowledgeable managers.
Sourcing	<i>Explain what external outsourcing means in a Support Center environment</i>	External outsourcing is paying a third party to provide support services on the provider's premises that a company might otherwise have employed its own Support Center staff to perform.
	<i>Explain what internal outsourcing means in a Support Center environment</i>	Internal outsourcing is paying another company to provide support services on your own premises that a company might otherwise have employed its own Support Center staff to perform.
	<i>List the advantages of outsourcing</i>	The advantages of outsourcing include: <ul style="list-style-type: none"> ■ Eliminating the time consuming day-to-day supervision of the Support Center ■ Focusing management resources on core competencies and the quality of the services provided ■ Reducing capital expenditures and headcount ■ Increasing staffing flexibility ■ Having defined and documented service levels



BUSINESS ALIGNMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Sourcing	<i>List the disadvantages of outsourcing</i>	The disadvantages of outsourcing include: <ul style="list-style-type: none"> ■ Losing control of day-to-day operations ■ Reducing infrastructure efficiency ■ Losing corporate identity ■ Moving further away from the Support Center's customers
	<i>Explain the service level management (SLM) considerations when outsourcing</i>	When outsourcing, SLAs require a higher level of granularity and the following must be documented: <ul style="list-style-type: none"> ■ The responsibilities of both the service provider and the customer ■ Incident and request work flows ■ Interfaces between outsourcers and the customer ■ Performance levels (e.g., response time, resolve time, status updates, etc.) ■ The conflict resolution process ■ The frequency of reviews ■ The timing of responses
	<i>Describe insourcing in a Support Center environment</i>	Insourcing involves leveraging an organization's existing or internal staff to provide support services to a customer base outside of the Support Center's customary areas (e.g., the Support Center taking calls after hours from another division that has its own Support Center). When insourcing, the Support Center subcontracts work for other companies or organizational units.
	<i>Identify advantages of insourcing</i>	The advantages of insourcing include: <ul style="list-style-type: none"> ■ Improving the productivity of the organization ■ Increasing flexibility for staffing peak and off-peak periods ■ Increasing revenues for the company ■ Allowing for better utilization of IT and Support Center resources ■ Having clearly defined and documented service levels ■ Improving customer service ■ Allowing staff to focus on new, higher value initiatives
	<i>Identify disadvantages of insourcing</i>	The disadvantages of insourcing include: <ul style="list-style-type: none"> ■ New services may result in a loss of focus on the primary business ■ Increases in workload may not result in increased or adequate staffing
	<i>Describe Rightsourcing and its possible benefits</i>	Rightsourcing: <ul style="list-style-type: none"> ■ Involves identifying the proper balance of outsourcing and other sourcing options to ensure financial and operational effectiveness ■ Maintains operational control while enabling the utilization of effective external options ■ Provides an optimum mix of insourced and outsourced support, which balances customer service quality with corporate return on investment (ROI)

HDM Certification Standards

BUSINESS ALIGNMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Marketing the Support Center	<i>Identify benefits of marketing the Support Center</i>	Marketing the Support Center allows you to: <ul style="list-style-type: none"> ■ Communicate priorities and how the priorities are being met ■ Ensure that customers are aware of the Support Center's contributions and how the Support Center is helping the business meet its strategic goals ■ Increase the visibility of the support organization to key stakeholders ■ Raise morale ■ Prove that the Support Center is bringing a return on investment
	<i>Identify factors that drive the Support Center's marketing</i>	The following factors drive the Support Center's marketing: <ul style="list-style-type: none"> ■ Improvement initiatives ■ Customer requirements ■ Performance measurements ■ Customer feedback
	<i>Describe techniques for marketing the Support Center</i>	The following techniques can be used to market the Support Center: <ul style="list-style-type: none"> ■ Create a dashboard that outlines the Support Center's key achievements (e.g., performance, customer satisfaction, financial metrics, and proactive measures) ■ Distribute a Support Center newsletter (e.g., the newsletter can be called <i>Tips and Techniques</i> or <i>How to Use the Support Center to Help You</i>) ■ Conduct 'lunch and learn' or 'brown-bag' sessions ■ Solicit suggestions, complaints, and compliments about the Support Center ■ Send e-mails that describe the role of the Support Center ■ Meet with customers and ask them what they need ■ Evaluate insourcing opportunities ■ Set up a booth at sales meetings and large functions or in key areas like the lunch room (i.e., in-person marketing) ■ Promote the Support Center via a company and/or Support Center intranet
	<i>Describe considerations for internal marketing</i>	To effectively market the Support Center internally, you should: <ul style="list-style-type: none"> ■ Understand the various methods of communication and know which are most effective with your customer base ■ Understand corporate organization and departmental structure ■ Understand the different types of customers to whom you provide services ■ Perform a needs assessment ■ Hone your presentation skills ■ Understand the importance of ongoing, regular communication ■ Report your performance to your customers ■ Educate management on the value of the Support Center ■ Communicate with both management and individual contributors to understand their different perspectives



BUSINESS ALIGNMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Marketing the Support Center	<i>Identify key components of marketing and positioning the Support Center</i>	<p>Key components of marketing and positioning the Support Center include:</p> <ul style="list-style-type: none"> ■ Recognizing marketing principles and tools <ul style="list-style-type: none"> ■ Marketing principles are the best practices for marketing (e.g., making sure that the message is defined, clearly presented, targeted to the audience, and delivered clearly and concisely) ■ Marketing tools include the different types of media that are used to deliver the message (e.g., daily reports, marketing newsletters, e-mails, advertising campaigns) ■ Identifying the difference between service and product marketing <ul style="list-style-type: none"> ■ Service marketing involves providing statistics about levels of service and customer satisfaction ■ Product marketing involves publicizing specific product releases or enhancements ■ Recognizing the value of using advertising and public relations techniques (e.g., publicizing the ROI that the Support Center has created for the organization helps get the message out that the Support Center is profitable) ■ Communicating the Support Center's values, goals, objectives, and expectations ■ Communicating the financial impact of Support Center measurements to the organization (e.g., making the cost per call or per incident available to the department or customer)
	<i>Explain how to manage stakeholder expectations and project scope</i>	<p>To manage stakeholder expectations and project scope:</p> <ul style="list-style-type: none"> ■ Survey customers frequently to determine their needs ■ Ask customers to evaluate your present performance and suggest ideas for improvement ■ Share KPI with stakeholders ■ Evaluate present resources and levels of performance and give feedback for improvement
Return on Investment (ROI)	<i>Describe how to monitor and manage the financial performance of a project, department, or business unit</i>	<p>To monitor and manage the financial performance of a project, department, or business unit:</p> <ul style="list-style-type: none"> ■ Create and maintain the Support Center's process functions, including: <ul style="list-style-type: none"> ■ Team responsibilities ■ Deliverables ■ Expectations ■ Reporting ■ Auditing ■ Communicate clear deliverables and expectations ■ Require regular progress reports ■ Manage the Support Center like a business partner with IT, balancing cost performance dollars ■ Manage the professional development of the Support Center's personnel ■ Define strict timelines and budgets ■ Determine the impact of proposed services on the success of the organization as a whole
	<i>Describe return on investment (ROI)</i>	<p>Return on investment is used to calculate the return on support investment. It is calculated using the following formula: $(\text{value}-\text{cost})/\text{cost} \times 100$.</p>

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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Return on Investment (ROI)	<i>List the steps used to calculate ROI</i>	To calculate ROI, perform the following steps: <ul style="list-style-type: none"> ■ Collect data ■ Convert data to monetary value ■ Determine costs ■ Identify intangible benefits ■ Report results
	<i>Recognize how implementing a ROI or cost-benefit methodology affects the Support Center and other departments</i>	By implementing a ROI methodology, you will be able to: <ul style="list-style-type: none"> ■ Participate in enterprise-wide initiatives and cross-functional teams ■ Evaluate expense and benefit opportunities with every project or decision ■ Determine the payback and/or savings of each project ■ Accurately measure the impact of services and solutions on business value ■ Manage the costs of operations, quantify value, and increase first contact resolutions
	<i>Identify ways for a support manager to reduce costs</i>	Ways for a support manager to reduce costs include: <ul style="list-style-type: none"> ■ Implementing cost containment programs ■ Striving for realistic and verifiable ROI ■ Adopting standard methods of measurement ■ Locking down desktops ■ Running the Support Center like a business ■ Thinking tactically and strategically ■ Defining and documenting roles and responsibilities ■ Communicating expectations to the support team ■ Reporting performance to the support team ■ Getting buy-in from senior management ■ Measuring performance and KPI ■ Reporting individual and team performance ■ Sending e-mails ■ Conducting: <ul style="list-style-type: none"> ▮ Daily meetings ▮ One-on-one meetings ▮ Team meetings ▮ Forums ▮ Roundtable discussions ▮ Surveys



OPERATIONAL MANAGEMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Service Level Management (SLM)	<i>Describe service level management (SLM)</i>	<p>Service level management (SLM):</p> <ul style="list-style-type: none"> ■ Documents service level objectives and goals ■ Monitors performance of service level objectives and goals ■ Improves performance within the constraints of the service level agreement (SLA) ■ Makes service level expectations known internally and externally
	<i>Describe service level agreements (SLAs)</i>	<p>A service level agreement (SLA) is an agreement between the customer and the service provider that:</p> <ul style="list-style-type: none"> ■ Documents the types of services provided ■ Documents the level of services (e.g., response time and hours of operation) ■ Documents the methods used for measuring and reporting compliance with the agreement ■ Identifies the process for dealing with conflict between the customer and the service provider ■ Sets the expectations of the customer and service provider, minimizing conflicts and improving satisfaction
	<i>Identify steps to take to effectively implement and maintain a SLA</i>	<p>To effectively implement and maintain a SLA, perform the following steps:</p> <ul style="list-style-type: none"> ■ Define requirements and expectations clearly for both the customer and the service provider ■ Define baseline requirements and the methods used to measure performance ■ Establish an incentive system of rewards and penalties for compliance and noncompliance ■ Implement tools to monitor SLA compliance ■ Periodically review the SLA baseline for timeliness and accuracy
Operational Level Agreements (OLA)	<i>Describe operational level agreements (OLAs)</i>	<p>An operational level agreement (OLA):</p> <ul style="list-style-type: none"> ■ Is an agreement between the first level support organization or team and the other internal organizations or support teams that are a part of the overall support process ■ Documents the agreements reached between two organizations or teams to ensure the successful achievement of the SLAs for the customer ■ Includes additional items that are not necessarily contained in the SLA (e.g., time to escalate issues from Level I to Level II, time to resolve or escalate for Level II, and time to resolve for Level III)
Change Management	<i>Describe organizational change management</i>	<p>Organizational change management is a set of processes designed to influence the human and organizational variables associated with a change to minimize the impact on the staff, customers, and services provided.</p>
	<i>Describe the technical change management process</i>	<p>Technical change management is a process used to identify, track, and manage all changes in the support environment. Someone from the Support Center should be involved in the change management process to ensure that the Support Center is aware of upcoming changes, provide valuable input into possible support issues with proposed changes, enable communication to the customers of planned maintenance, and ensure knowledge and processes if a change fails.</p>

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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Change Management	<i>Identify the benefits of using an organizational change management process</i>	<p>The benefits of using an organizational change management process include:</p> <ul style="list-style-type: none"> ■ Improving organizational performance ■ Enabling personal and professional growth ■ Ensuring that only approved and authorized changes are implemented ■ Managing risk ■ Involving stakeholders in developing plans ■ Gaining stakeholders buy-in for new plans ■ Reducing the adverse impact of changes on customers ■ Improving the productivity of users due to the reduced impact of changes ■ Aligning services to customers' needs
	<i>Recognize the actions involved in leading a change management team</i>	<p>Leading a change management team includes:</p> <ul style="list-style-type: none"> ■ Establishing a team ■ Appointing formal and informal team leaders ■ Ensuring that all levels of the organization are represented in the team ■ Training the team ■ Involving the Support Center in developing the team's vision
	<i>Identify the basic components of an IT change management process</i>	<p>The basic components of an IT change management process include:</p> <ul style="list-style-type: none"> ■ Identifying the proposed change ■ Performing a technical assessment of the change ■ Determining the impact of the change ■ Determining the risk of change ■ Assessing the affect the change will have on the business ■ Assessing the timing of the change and the change's compatibility with business plans ■ Obtaining approval from management ■ Ensuring that back-out plans are in place ■ Accepting, rejecting, or deferring the change ■ Testing and evaluating the change ■ Verifying that the change does no have a negative impact on the environment ■ Installing the change ■ Implementing the change and notifying all affected parties ■ Reviewing the change ■ Performing an ongoing evaluation of the change management process

OPERATIONAL MANAGEMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Change Management	<i>Identify the role of the Support Center in the change management process</i>	The role of the Support Center in the change management process includes: <ul style="list-style-type: none"> ■ Publicizing the change ■ Preparing for the change (e.g., performing upgrades and installations, adding new operations procedures, receiving training on support issues, etc.) ■ Documenting and tracking the change ■ Documenting and tracking the impact of the change on the customer ■ Summarizing and publishing the results of the change
	<i>Describe appropriate interactions between change management and problem management teams</i>	Appropriate interactions between change management and problem management teams include: <ul style="list-style-type: none"> ■ Associating and tracking problem reports with changes ■ Providing reports to appropriate parties ■ Sharing information to improve future changes ■ Trending and analyzing the change history
	<i>Identify the potential impact the rollout of new technologies has on the Support Center</i>	The rollout of new technologies can have the following impact on the Support Center: <ul style="list-style-type: none"> ■ Call volume increases as the rollout progresses ■ Early feedback on problems can be used as an opportunity for improvement ■ The change has an impact on the organization's productivity (e.g., lowering productivity at first and then improving it)
Problem Management	<i>Describe problem management</i>	Problem management is a process that is used to evaluate high impact incidents to understand their root cause and to prevent them from happening in the future.
	<i>Recognize the role of the Support Center in the problem management process</i>	The role of the Support Center in the problem management process is to document incidents and problems as they occur.
	<i>Identify basic components of problem management</i>	Basic components of problem management include problem control and error control: <ul style="list-style-type: none"> ■ Problem control identifies the underlying causes of incidents to prevent future recurrences. ■ Error control covers the processes involved in progressing known errors until they are eliminated by the successful implementation of a change under the control of the change management process. The objective is to be aware of errors, monitor them, and eliminate them when feasible and cost justifiable.
	<i>Recognize the benefits of problem management</i>	The benefits of problem management include: <ul style="list-style-type: none"> ■ Reducing the number of incidents ■ Eliminating problems ■ Improving products based on feedback ■ Increasing customer productivity and satisfaction ■ Fixing the cause of the problem rather than the symptom
	<i>Describe root cause analysis</i>	Root cause analysis is: <ul style="list-style-type: none"> ■ A methodical approach used to determine the underlying cause of a problem, which if eliminated or corrected would prevent the problem from existing or recurring ■ Typically used by problem management teams ■ Also used by the subject matter experts (SMEs) responsible for developing improvement plans, training programs, etc.

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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Problem Management	<i>Recognize the benefits of root cause analysis</i>	<p>The benefits of root cause analysis include:</p> <ul style="list-style-type: none"> ■ Allowing the Support Center to determine why problems are occurring and take actions to eliminate similar problems ■ Reducing problem resolution time ■ Enabling rapid prioritization of alternative solutions or workarounds ■ Allowing the information on workarounds to be made available to all users until a permanent solution is provided
	<i>Identify the steps used in root cause analysis</i>	<p>The steps used in root cause analysis include:</p> <ul style="list-style-type: none"> ■ Clustering incidents into groups ■ Separating the symptoms from the effects of the incident ■ Breaking the incident down into business requirements ■ Formulating measurements to eliminate failures ■ Developing a plan for change to eliminate failures ■ Making recommendations to management
Incident Management	<i>Explain the difference between incident management and problem management</i>	<p>Incident management seeks to restore normal service operation by resolving incidents as quickly as possible. Problem management is concerned with finding the underlying cause of the incidents and eliminating the cause.</p>
	<i>Describe the role of the Support Center in the incident management process</i>	<p>The role of the Support Center in the incident management process includes:</p> <ul style="list-style-type: none"> ■ Recording and documenting all incidents or requests ■ Categorizing all incidents or requests ■ Resolving incidents or requests or involving the appropriate group ■ Monitoring incidents or requests until they are closed ■ Ensuring that service was complete and bringing the incident or request to closure ■ Following up on reported incidents
	<i>Recognize the benefits of using an incident management system</i>	<p>The benefits of using an incident management system include:</p> <ul style="list-style-type: none"> ■ Receiving a system-wide view of the types of incidents encountered ■ Managing incidents from end-to-end to ensure continuity and resolution ■ Identifying points of failure ■ Facilitating proactive communication ■ Preventing similar incidents from occurring ■ Facilitating continuous improvement
	<i>List the basic components of an incident management process</i>	<p>The basic components of an incident management process include:</p> <ul style="list-style-type: none"> ■ Receiving the incident ■ Logging and acknowledging the incident ■ Assessing the priority of the incident ■ Diagnosing the incident ■ Isolating the cause of the incident ■ Resolving the incident or developing an action plan ■ Verifying the resolution ■ Communicating the completion of the process ■ Reviewing and analyzing the process
Knowledge Management	<i>Describe knowledge management</i>	<p>Knowledge management (KM) is the capture and reuse of business and technical information in an organization. Knowledge management processes were developed by organizations to manage some or all of the knowledge within the organization as a resource in the same way that they manage real estate, inventory, or human resources.</p>



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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Knowledge Management	<i>Recognize the benefits of knowledge management in a Support Center environment</i>	<p>The benefits of knowledge management in a Support Center environment include:</p> <ul style="list-style-type: none"> ■ Enabling Support Center staff and customers to work more effectively and efficiently ■ Ensuring that knowledge is accessible ■ Reducing training time for new personnel ■ Solving a problem once and using the solution many times ■ Promoting a culture of self-sufficiency through the use of self-help tools and technology ■ Building rapport and establishing credibility between the various teams in the Support Center by sharing knowledge ■ Allowing for effective support processes ■ Reducing costs in the Support Center
	<i>Identify the steps to take to develop and maintain a knowledge base</i>	<p>The steps to take to develop and maintain a knowledge base include:</p> <ul style="list-style-type: none"> ■ Capturing tacit knowledge within an organization. ■ Reviewing and evaluating information for accuracy and conformity to standards ■ Revising existing data to improve accuracy and ensure conformity to standards ■ Storing information in a central repository ■ Making the content available to customers and employees when and where they need it
	<i>Identify possible sources of content for the knowledge base</i>	<p>Possible sources of content for the knowledge base include:</p> <ul style="list-style-type: none"> ■ Call logs ■ Personal experience ■ Training classes ■ Vendor FAQs ■ Other IT groups ■ Developers ■ Administrators ■ Other technical support groups ■ Users ■ Early users of beta and prototype versions ■ Third party knowledge bases ■ Web sites ■ White papers ■ Training presentations
	<i>Explain the importance of documenting processes and procedures</i>	<p>Documenting processes and procedures:</p> <ul style="list-style-type: none"> ■ Ensures consistent service ■ Creates a resourceful atmosphere ■ Builds confidence for professional call handling ■ Encourages adherence to policies and procedures ■ Facilitates change ■ Ensures consistent service
	<i>Describe the common forms of reference documentation and sources of information for Support Center personnel</i>	<p>Common forms of reference documentation and sources of information for Support Center personnel include:</p> <ul style="list-style-type: none"> ■ Books (e.g., user's guides and reference manuals) ■ Training materials ■ Conferences, shows, and exhibitions ■ Vendors ■ Industry associations and publications ■ E-mail (HDAs often store tips and notes on common solutions) ■ Web sites ■ FAQs ■ Knowledge bases ■ Online help ■ Index or keyword searches ■ Knowledge of peers, customers, or IT staff

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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
IT Configuration Management	<i>Describe IT configuration management</i>	<p>IT configuration management:</p> <ul style="list-style-type: none"> ■ Provides lifecycle management for IT equipment based on a balanced implementation of people, processes, and technology ■ Tracks all of an organization's property and resources via asset management, including: <ul style="list-style-type: none"> ■ Computer hardware and software ■ Software licenses ■ Equipment and furniture ■ Patents ■ Leased equipment ■ Keeps track of which assets are being utilized and which assets are available for reallocation ■ Allows the organization to determine total cost of ownership (TCO), depreciation, licensing and maintenance costs, and appropriate insurance coverage ■ Provides a logical model of the IT infrastructure
	<i>List the advantages of implementing an IT configuration management process</i>	<p>The advantages of implementing an IT configuration management process include:</p> <ul style="list-style-type: none"> ■ Reusing equipment and licenses ■ Identifying illegally installed or unlicensed software ■ Accounting for costs ■ Saving on costs ■ Facilitating impact and trend analysis for problems and changes
	<i>List the disadvantages of implementing an IT configuration management process</i>	<p>The disadvantages of implementing an IT configuration management process include:</p> <ul style="list-style-type: none"> ■ IT configuration management programs can be complex ■ IT configuration management programs can be labor intensive ■ Automated tools for IT configuration management are still evolving
Release Management	<i>Describe release management</i>	<p>Release management is a specific set of change management processes that typically relate to hardware and software updates, upgrades, or rollouts. Release management also encompasses configuration management.</p>
	<i>Identify the responsibilities of the Support Center in the release management process</i>	<p>The responsibilities of the Support Center in the release management process are:</p> <ul style="list-style-type: none"> ■ Agreeing on the policies and procedures that will be used during release management (<i>i.e.</i>, developing a release policy) ■ Planning and documenting procedures for building releases ■ Ensuring that each release is conducted according to the release policy ■ Testing releases ■ Communicating new releases to all parties involved
	<i>Recognize the benefits of implementing a release management process</i>	<p>The benefits of implementing a release management process include:</p> <ul style="list-style-type: none"> ■ Utilizing resources more effectively ■ Increasing productivity within the enterprise ■ Interfacing with change management and configuration management to ensure accuracy ■ Improving the quality of services due to higher quality releases

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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Security Management	<i>Identify the importance of having security policies</i>	Having security policies is important because they: <ul style="list-style-type: none"> ■ Protect the company and the customer from unauthorized access ■ Protect data integrity ■ Protect corporate assets
	<i>Recognize the benefits of having security policies</i>	The benefits of having security policies include: <ul style="list-style-type: none"> ■ Setting customers' expectations for the protection of data and personal information ■ Enhancing credibility with customers, partners, and employees ■ Protecting the company in the event of data loss
	<i>Identify types of security policies</i>	Security policies include: <ul style="list-style-type: none"> ■ Implementing unique login name and password parameters ■ Establishing password reset requirements ■ Reducing the visibility of credit card information ■ Blocking access to personal information ■ Instituting identification badge requirements
	<i>Identify key types of information that require confidentiality from the Support Center</i>	Types of information that require confidentiality from the Support Center include: <ul style="list-style-type: none"> ■ Customer data ■ Personal contact information ■ Social Security Numbers or national IDs ■ Individual and corporate financial information ■ Corporate or company information ■ Product development plans ■ Strategic plans
	<i>Recognize the importance of reporting security compromises</i>	Reporting security compromises is important because it: <ul style="list-style-type: none"> ■ Protects the company and the customer ■ Identifies the offender and prevents the security breach from occurring again ■ Limits the damage that is caused ■ Alerts customers to possible security threats ■ Helps in the resolution of security problems
	<i>Explain the importance of having documented policies relating to data security and personal backups</i>	Having documented policies relating to data security and personal backups is important because documented policies: <ul style="list-style-type: none"> ■ Protect business operations ■ Ensure the ongoing viability of the organization ■ Limit access to sensitive resources ■ Prevent software piracy
	<i>Recognize the purpose of backups</i>	The purpose of backups is to: <ul style="list-style-type: none"> ■ Simplify system recovery ■ Prevent data loss and corruption ■ Satisfy legal requirements (e.g., audits) ■ Safeguard corporate assets ■ Prepare for unforeseen incidents
	<i>Identify the most common types of backup</i>	<ul style="list-style-type: none"> ■ Full or system backups back up of all files on the system ■ Incremental backups back up files that have changed since the last full or system backup

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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
IT Business Continuity Planning	<i>Recognize the purpose of business continuity planning for a Support Center</i>	Business continuity planning: <ul style="list-style-type: none"> ■ Maintains critical services to customers with minimal disruptions ■ Eliminates single points of failure for delivering services ■ Provides both short and long-term workarounds
	<i>Identify key factors that affect business continuity planning</i>	Key factors that affect business continuity planning include: <ul style="list-style-type: none"> ■ Business requirements ■ Critical application requirements ■ SLA requirements ■ The cost of downtime
	<i>Identify the factors to consider when setting up an off-site business continuity facility</i>	Consider the following factors when setting up an off-site business continuity facility: <ul style="list-style-type: none"> ■ Location ■ Ease of access during times of disaster ■ Availability of transportation ■ Storage and space capacity ■ Availability of food, water, and housing ■ Cost ■ Availability of public utilities (e.g., electricity, gas, water, telephone, etc.) ■ Communication and system capabilities ■ Staffing mobility and alternatives ■ Data transfer recovery mechanisms
	<i>Recognize the characteristics of hot, warm, and cold continuity sites</i>	<ul style="list-style-type: none"> ■ Hot continuity sites are available immediately, the transfer of control is invisible to customers, and there is no disruption to customers ■ Warm continuity sites allow for a quick transfer to the secondary location and there is minimal disruption to customers ■ Cold continuity sites are identified facilities that require equipment to be procured, delivered, and/or installed and there is disruption to customer
Benchmarking in a Support Center	<i>Describe the role of benchmarking in a Support Center environment</i>	Benchmarking is a comparative evaluation of Support Centers performance that provides an understanding of the relative differences and similarities among the Support Centers benchmarked. It is used to provide meaningful and readily implemented recommendations that are determined by analyzing an organization's IT support results against the performance of comparable organizations. Benchmarking is completed through the use of consensus methodologies and robust metrics that enable consistent data collection and true peer group comparisons.
	<i>Recognize the benefits of benchmarking</i>	The benefits of benchmarking include: <ul style="list-style-type: none"> ■ Linking customer satisfaction with service levels ■ Implementing continuous improvement initiatives ■ Developing Support Center best practices ■ Evaluating outsourcing alternatives
	<i>Identify common methods used to analyze Support Center measurements</i>	Common methods used to analyze Support Center measurements include: <ul style="list-style-type: none"> ■ Root cause analysis ■ Gap analysis ■ Trend analysis



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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Customer Satisfaction	<i>Identify the purpose of customer satisfaction surveys</i>	<p>Customer satisfaction surveys are used to:</p> <ul style="list-style-type: none"> ■ Determine the customers' perception of the Support Center's products and services ■ Determine whether the Support Center's products and services are meeting customers' expectations ■ Identify what the customers feel is important ■ Identify areas for improvement ■ Benchmark and trend customer satisfaction ■ Assist in developing new products and services based on customers' needs
	<i>Describe the three most common types of surveys used by Support Centers</i>	<p>Ongoing surveys:</p> <ul style="list-style-type: none"> ■ Are completed as soon as possible after a call is closed ■ Are typically short (<i>e.g.</i>, 5–8 questions) and can be completed quickly ■ Measure the quality of a single call or incident ■ Are used to trend customer satisfaction between annual surveys and measure the impact of changes in processes, products, or services <p>Annual or periodic surveys:</p> <ul style="list-style-type: none"> ■ Are planned and scheduled on periodic basis (normally annually) ■ Are used to evaluate overall satisfaction levels with the Support Center's products, service offerings, and personnel ■ Identify changes to products, services, and processes that customers feel would improve their relationship with the Support Center and better meet their needs ■ Are based on the customer's perception of the company over the last year or period <p>Onetime or event surveys:</p> <ul style="list-style-type: none"> ■ Are not completed during regularly scheduled intervals ■ Are scheduled for a specific reason ■ Are appropriate for evaluating satisfaction levels with current products and service offerings or for identifying changes that customers feel are important

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Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)	
Key Performance Indicators (KPI) and Support Center Metrics	<i>Identify the purpose of Support Center metrics</i>	Support Center metrics help the HDM: <ul style="list-style-type: none"> ■ Determine scheduling needs ■ Develop staffing plans ■ Measure productivity and performance ■ Analyze costs ■ Understand customer satisfaction ■ Understand employee satisfaction ■ Analyze trends 	
		<i>Identify how common Support Center metrics are used</i>	Average speed to answer (ASA): <ul style="list-style-type: none"> ■ Is the average amount of time that a customer is waiting (in a queue) before the call is answered ■ Is used to determine how long customers wait to speak to a HDA ■ Is used to evaluate and adjust staffing levels
		Abandon before answer (ABA): <ul style="list-style-type: none"> ■ Is used to measure the percentage of customers that terminate a call (i.e., hang up) before the call is answered by a HDA 	
		Average talk time (ATT): <ul style="list-style-type: none"> ■ Is the average time spent talking to a customer on each call ■ Is used to evaluate staffing and training needs 	
		Availability: <ul style="list-style-type: none"> ■ Is the percentage of the total time that the HDA was available to take incoming or make outgoing calls ■ Is used to measure the productivity of the Support Center and the HDA 	
		First contact resolution (FCR): <ul style="list-style-type: none"> ■ Measures the percentage of incidents that are resolved upon initial contact with the customer ■ Is used to measure the knowledge level of the HDA ■ Is used to measure the complexity of incidents relative to HDA knowledge levels 	
		Cost per call: <ul style="list-style-type: none"> ■ Is used to measure the average cost per call for the Support Center ■ Is calculated by dividing total Support Center costs by the total number of calls 	
		Cost per incident: <ul style="list-style-type: none"> ■ Is used to measure the average cost per incident for the Support Center ■ Is calculated by dividing total Support Center costs by the total number of incidents 	
		Customer satisfaction: <ul style="list-style-type: none"> ■ Measures customer satisfaction with the Support Center's products and services ■ Is used to evaluate the overall performance of the Support Center's staff, infrastructure, and management ■ Is typically measured on a scale of 1–4 or 1–10 	



OPERATIONAL MANAGEMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Key Performance Indicators (KPI) and Support Center Metrics	<i>Recognize why Level II and III escalations are monitored</i>	<p>Level II and III escalations are monitored to:</p> <ul style="list-style-type: none"> ■ Measure the percentage and duration of incidents that are transferred to other Support Centers ■ Measure the Support Center's overall effectiveness in following the SLA ■ Measure the percentage of incidents that are resolved at each level and within each group ■ Measure the overall effectiveness of the Support Center by evaluating each element of the support process ■ Identify cost saving opportunities by determining which calls can be shifted to Level I and locating key areas for improvement
	<i>Identify the key sources of metrics for the Support Center</i>	<p>The key sources of metrics for the Support Center are the:</p> <ul style="list-style-type: none"> ■ Automatic call distributor (ACD) and private branch exchange (PBX) ■ Incident management and tracking systems ■ Network monitoring systems ■ Knowledge management systems
	<i>Identify common quality assurance practices</i>	<p>Common quality assurance practices include:</p> <ul style="list-style-type: none"> ■ Call monitoring ■ Incident monitoring ■ KPI monitoring ■ Customer surveys ■ Roundtables ■ Focus groups
	<i>Recognize the benefits of call monitoring</i>	<p>The benefits of call monitoring include:</p> <ul style="list-style-type: none"> ■ Ensuring that the call documentation process is followed ■ Validating the information provided to customers ■ Providing feedback to Support Center staff on job performance ■ Identifying strengths and weaknesses of individuals and the organization ■ Providing coaching opportunities ■ Verifying consistency in call management ■ Identifying areas where processes are not meeting expectations or are not being followed ■ Identifying earlier opportunities for improvement ■ Improving the quality of service
	<i>Identify mechanisms for call monitoring</i>	<p>Mechanisms for incident monitoring include:</p> <ul style="list-style-type: none"> ■ Performing live service observations in which a reviewer sits with the HDA and listens in on a call ■ Performing remote service observations in which a reviewer listens to calls live, but the HDA is not aware that the call is being evaluated ■ Performing call recording and evaluation ■ Making follow-up calls or conducting customer satisfaction surveys
	<i>Recognize the benefits of incident monitoring</i>	<p>The benefits of incident monitoring include:</p> <ul style="list-style-type: none"> ■ Providing quality and service assurance for the customer and the organization ■ Allowing the Support Center to proactively address situations rather than reacting to them
	<i>Identify methods for incident monitoring</i>	<p>Mechanisms for incident monitoring include:</p> <ul style="list-style-type: none"> ■ Reviewing incident documentation for completeness and accuracy ■ Conducting an online review with the HDA and caller after the incident is closed ■ Making follow-up calls or conducting customer satisfaction surveys

HDM Certification Standards

TECHNOLOGY MANAGEMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Support Center Infrastructure	<i>Identify common technologies used in the Support Center</i>	<p>Common technologies used in the Support Center include:</p> <ul style="list-style-type: none"> ■ Telephony <ul style="list-style-type: none"> ■ Phone: private branch exchange (PBX) and automated call distribution (ACD) ■ Fax ■ Voice mail ■ Integrated voice response (IVR) ■ Call management systems (CMS) ■ E-mail ■ Internet and Web technologies ■ Incident management systems ■ Problem management systems ■ E-mail management systems (EMS) ■ Knowledge management systems ■ Change management systems ■ Wireless technologies ■ Alert systems ■ Broadcast devices (e.g., display boards) ■ Remote access tools ■ Self-help and self-healing technologies
Telephony	<i>Identify general telephony (PBX and ACD) features</i>	<p>General telephony features include:</p> <ul style="list-style-type: none"> ■ Hold ■ Conference calling ■ Transfer ■ Voice mail ■ Agent tracking availability <ul style="list-style-type: none"> ■ Available ■ Working ■ Unavailable ■ Ability to generate call information <ul style="list-style-type: none"> ■ Number of calls to the Support Center ■ Average speed to answer (ASA) ■ Number of abandons ■ Hold time ■ Talk time ■ Frequency of calls ■ Reporting capabilities ■ Night and unattended service
	<i>Identify the types of equipment that are typically integrated with Support Center telephony systems</i>	<p>The types of equipment that are typically integrated with Support Center telephony systems include:</p> <ul style="list-style-type: none"> ■ Call recording equipment ■ Management reporting servers ■ E-mail routing servers ■ Customer management systems ■ Problem or request management systems



TECHNOLOGY MANAGEMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Telephony	<i>Describe the role of computer telephony integration (CTI) in a Support Center</i>	<p>Computer telephony integration (CTI) is the integration of IT and telephony equipment to facilitate the efficient processing of customer contacts. CTI allows the Support Center's management to:</p> <ul style="list-style-type: none"> ■ Identify callers to the HDA (e.g., the screen pop has the caller's name, etc.) ■ View KPI in real time ■ View customer management statistics and reporting data across multiple platforms ■ Apply business rules for delivering personalized service
	<i>Identify common features of CTI</i>	<p>Common features of CTI include:</p> <ul style="list-style-type: none"> ■ Screen pop ■ Password reset ■ Automated customer profile ■ Automated dialing ■ Automated dispatch
	<i>Identify benefits of CTI</i>	<p>Benefits of CTI include:</p> <ul style="list-style-type: none"> ■ Call handling efficiency and accuracy ■ Customization capabilities ■ Integration with the ACD
	<i>Identify some of the common problems encountered when integrating CTI with incident management systems</i>	<p>Some of the common problems encountered when integrating CTI with incident management systems are:</p> <ul style="list-style-type: none"> ■ CTI is a systems integration project, not an off-the-shelf application ■ Incident management systems integration is complex and costly ■ The screen pop may delay the time it takes the Support Center to answer a call, increasing ASA ■ Screen pops typically require customers to input information, requiring accurate databases

HDM Certification Standards

HUMAN RESOURCE AND TEAM DEVELOPMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Staffing	<i>Identify ways to pursue continuous learning and take advantage of opportunities to train oneself</i>	Ways to pursue continuous learning and take advantage of opportunities to train oneself include: <ul style="list-style-type: none"> ■ Soliciting assessment feedback ■ Creating an individual development plan ■ Volunteering for projects that require you to learn new information within tight timeframes ■ Participating in training courses
	<i>Recognize how to recruit people with optimal skills and personal traits</i>	To recruit people with optimal skills and personal traits: <ul style="list-style-type: none"> ■ Involve model team members in the interview and selection process ■ Use structured and defined interviewing processes ■ Perform a skills gap analysis ■ Follow your company's hiring processes and procedures
	<i>Identify how to retain valued members of your staff</i>	To retain valued members of your staff: <ul style="list-style-type: none"> ■ Review your team's structure for opportunities to leverage the skills of team members ■ Perform job analysis to determine the required skills and temperament ■ Evaluate the performance of team members ■ Provide support to facilitate optimum performance ■ Help team members develop an ongoing developmental program that will allow them to grow within the organization
	<i>Identify qualities and skills to look for in your staff</i>	Qualities and skills to look for in your staff include: <ul style="list-style-type: none"> ■ Listening skills ■ Questioning skills ■ Technical skills ■ Problem solving skills ■ The ability to work in a team ■ The ability to learn quickly ■ A good temperament
	<i>Identify ways to maintain a satisfied and productive staff</i>	In order to maintain a satisfied and productive staff: <ul style="list-style-type: none"> ■ Pay your staff fairly ■ Treat your staff with respect ■ Recognize team and individual accomplishments ■ Communicate team goals ■ Celebrate success ■ Involve employees in decision making and seek feedback ■ Create learning opportunities ■ Create a sense of belonging ■ Share information
	<i>Explain what multitasking means in a Support Center environment</i>	Multitasking in a Support Center environment means the ability to: <ul style="list-style-type: none"> ■ Switch topics frequently ■ Deal with frequent changes ■ Prioritize tasks throughout the day with minimal supervision ■ Work on several tasks concurrently without sacrificing effectiveness
	<i>Describe how to use recognition and rewards to create energy and enthusiasm for reaching defined goals</i>	Use recognition and rewards to create energy and enthusiasm for reaching defined goals by: <ul style="list-style-type: none"> ■ Highlighting both individual and team contributions at staff or team meetings ■ Linking specific actions to the team's vision and business goals ■ Linking reinforcement and rewards to specific behaviors in a timely fashion
	<i>Describe how to constructively address individual performance problems</i>	Constructively address individual performance problems by: <ul style="list-style-type: none"> ■ Discussing the causes of the problem before the solution ■ Keeping the focus of the discussion on the poor performance or negative behavior ■ Explaining the importance of changing ■ Emphasizing the growth opportunities implicit in change ■ Emphasizing changing the behavior rather than changing the person



HUMAN RESOURCE AND TEAM DEVELOPMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Staffing	<i>List the considerations that team members who share a workspace must take into account</i>	Team members who share a workspace should: <ul style="list-style-type: none"> ■ Obtain the agreement of others before changing the spatial area ■ Maintain a clean environment ■ Use discretion and courtesy when decorating and organizing the workspace ■ Refrain from loading personal software onto computer equipment
	<i>Identify the steps involved in workforce scheduling</i>	The steps involved in workforce scheduling include: <ul style="list-style-type: none"> ■ Forecasting future call volume using historical and current call volume data ■ Determining required staffing needs based on projected volume and service levels ■ Developing a workforce schedule ■ Evaluating performance in comparison to expectations and plans and readjusting plans and expectations as necessary
	<i>Identify methods for assessing organizational and individual development needs</i>	Methods for assessing organizational and individual development needs include: <ul style="list-style-type: none"> ■ Skills gap analysis ■ Position profiling ■ Individual assessment ■ Peer assessment
	<i>Identify common methods for professional staff development</i>	Common methods for professional staff development include: <ul style="list-style-type: none"> ■ On-the-job training ■ Computer-based training ■ Instructor-led training ■ Proving staff with access to training resources
Leadership	<i>Identify the characteristics of a good leader as they relate to working with individuals, teams, and management</i>	The characteristics of a good leader include: <ul style="list-style-type: none"> ■ Maintaining a positive perspective within teams ■ Encouraging participation ■ Discouraging one person from dominating the team ■ Providing effective incentives that are challenging, yet attainable ■ Delegating effectively ■ Encouraging others to be creative and take initiative ■ Practicing and encouraging fairness ■ Making decisions even when they may be unpopular (e.g., decisions about managing deliverables, budgets, and results) ■ Successfully executing plans ■ Demanding more from oneself than anyone else ■ Continuing to learn
	<i>Identify the expected skills of a leader in a Support Center</i>	A leader in a Support Center is expected to: <ul style="list-style-type: none"> ■ Manage Support Center process reporting and accounting ■ Be an ongoing champion of service excellence ■ Provide management reports on Support Center personnel
	<i>Identify ways to reach new levels of performance</i>	To reach new levels of performance: <ul style="list-style-type: none"> ■ Review and analyze past successes to identify strengths, weaknesses, opportunities, and threats (SWOT) in order to identify areas for new initiatives. ■ Implement continuous improvement programs ■ Develop programs that reward initiative ■ Set high goals
	<i>Recognize ways to maintain a balanced and positive outlook</i>	Maintain a balanced and positive outlook by: <ul style="list-style-type: none"> ■ Creating a personal network of advisors with whom you can share problems and concerns ■ Concentrating on common goals during times of disagreement ■ Developing interests outside of work to provide ongoing sources of satisfaction and a stress-free zone ■ Having fun while you work

HDM Certification Standards

HUMAN RESOURCE AND TEAM DEVELOPMENT

Element	Criteria	Range of knowledge and understanding for criteria (not exhaustive)
Leadership	<i>Identify ways to challenge the status quo and drive positive changes</i>	<p>Challenge the status quo and drive positive changes by:</p> <ul style="list-style-type: none"> ■ Communicating the need for change by providing a compelling business rationale ■ Treating every failure as a learning opportunity
	<i>Identify ways to provide direction and focus under ambiguous or chaotic circumstances</i>	<p>Provide direction and focus under ambiguous or chaotic circumstances by:</p> <ul style="list-style-type: none"> ■ Creating a communication hub so that people can get accurate information ■ Empathizing with team members and leveraging your presence to help provide clarity ■ Creating an environment in which team members can experience a sense of continuity and control in their work lives (e.g., schedules, office furniture, etc.)
	<i>Recognize the basic concepts of teamwork</i>	<p>The basic concepts of teamwork include:</p> <ul style="list-style-type: none"> ■ Working together to accomplish common goals ■ Working together to share ideas ■ Actively listening to each other ■ Doing one's share ■ Not taking advantage of others on the team
	<i>Identify the characteristics of an effective team player</i>	<p>An effective team player:</p> <ul style="list-style-type: none"> ■ Participates in the team's activities ■ Displays courtesy and respect for others ■ Is open-minded to others' ideas ■ Is prompt ■ Shares knowledge
	<i>Identify basic group process skills</i>	<p>Basic group process skills include:</p> <ul style="list-style-type: none"> ■ Understanding team dynamics ■ Deferring to a leader or someone with more experience ■ Knowing how to use brainstorming techniques ■ Encouraging others to participate by asking questions
	<i>Identify the impact of tardiness, absenteeism, and paid time off on the team</i>	<p>Tardiness means being unprepared to begin one's shift at the designated time. Tardiness requires an immediate, short-term reactive response to meet service levels. Tardiness affects the team by imposing on others and is unfair to those who are prompt.</p> <p>Absenteeism is failure to report to work or leaving work without permission. Absenteeism requires a more long-term response to meet service levels. Absenteeism creates more work and stress for the rest of the team.</p> <p>Paid time off may be used for the purposes specified by the company. If paid time off is scheduled properly, service levels can still be met.</p>
	<i>Describe the benefits of peer mentoring</i>	<p>The benefits of peer mentoring include:</p> <ul style="list-style-type: none"> ■ Contributing to team rapport ■ Having new team members learn faster when shown and coached rather than having to rely solely on experience ■ Building trust among team members
	<i>Identify characteristics of a friendly and supportive workplace environment</i>	<p>A friendly and supportive workplace environment will contain the following characteristics:</p> <ul style="list-style-type: none"> ■ Rapport among team members ■ Empowerment from management ■ A willingness among the team members to collaborate with and assist other team members ■ Responsible and trustworthy team members ■ A diverse representation of team members



