HDI CERTIFIED INSTRUCTOR DOU

Document of Understanding

HDI

HDI Certification & Training
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Section 1: Overview

Welcome to the HDI Certified Instructor Program. HDI is your partner in achieving support center success. For nearly thirty years, we've worked with organizations like yours to ensure you're equipped with the tools, resources, and knowledge to elevate the customer experience.

HDI Certified Instructors (HDI-CI) are the only facilitators authorized to deliver HDI certification courses. CI's are expected to have a strong understanding of each course they deliver and be able to relay personal experiences to transfer knowledge and aid in the learning process. A CI must pass the certification exam at the mastery level (90% pass rate) for each course they desire to teach.

HDI Certified Instructors are authorized to deliver HDI certification training through one of the following channels:

- HDI Partner – A training company authorized to market, sell, and deliver HDI courses.

- HDI Corporate Training Partner – A specific company, educational institution, government agency, or organization that is a client of HDI and desires to train internal support staff using an internal HDI Certified Instructor to deliver HDI courses.

As an HDI Certified Instructor (HDI-CI), it is your job to create an engaging and interactive learning environment. Instructors are encouraged to be creative when facilitating the course material, without compromising consistency in the course. As an HDI Certified Instructor, facilitate your course delivery by emphasizing skills-building strategies and highlighting the certification standard. As an HDI Certified Instructor, you are responsible for delivering valuable information, driving consistency, and promoting best practices in your classroom.

HDI Training Product Offerings

Visit www.thinkhdi.com/certification for a complete list of HDI course offerings and descriptions.

Course Pre-requisites

All HDI Certified Instructors are required to provide a copy of their resume to HDI as a part of the application process. A minimum of two years of experience in a support center or contact center and previous instructional experience, training, and facilitation is recommended for all courses. In addition, each HDI course may have additional prerequisites that the instructor must satisfy, in order to be authorized to deliver a specific course. Below are the prerequisites for delivering each HDI course:

HDI Customer Service Representative (HDI-CSR)
- No prerequisites
- If the Instructor is authorized to deliver the HDI Support Center Analyst (HDI-SCA) and/or the HDI Desktop Support Technician (HDI-DST) courses; the instructor is automatically authorized to deliver HDI-CSR.

HDI Support Center Analyst (HDI-SCA)
- ITIL Foundation certification recommended
- Instructors who are authorized to deliver HDI-DST may deliver HDI-SCA after passing the HDI-SCA certification at the mastery level. The requirement to attend the HDI-SCA course is waved.

HDI Desktop Support Technician (HDI-DST)
- ITIL Foundation certification recommended
- Instructors who are authorized to deliver HDI-SCA may deliver HDI-DST after passing the HDI-DST certification at the mastery level. The requirement to attend the HDI-DST course is waved.

HDI Technical Support Professional (HDI-TSP)
- ITIL Foundation certification highly recommended
- 2-3 yrs. experience working with or at a level 2 or higher support or related experience

HDI Support Center Team Lead (HDI-SCTL)
- ITIL Foundation certification
- 2-3 yrs. experience at a supervisory level

HDI Support Center Manager (HDI-SCM)
- ITIL Foundation certification
- 3 yrs. experience as a support center manager or related consulting experience
- Knowledge of other IT Service Management frameworks recommended, such as ISO/IEC 20000 and KCS

HDI Desktop Support Manager (HDI-DSM)
- ITIL Foundation certification
- 3 yrs. experience as a desktop support manager or related consulting experience
- Knowledge of other IT Service Management frameworks recommended, such as ISO/IEC 20000 and KCS

HDI Support Center Director (HDI-SCD)
- ITIL Foundation certification
- HDI Support Center Manager (HDI-SCM) certification
- 3 yrs. experience as a support center director or related consulting experience
- Knowledge of other IT Service Management frameworks recommended, such as ISO/IEC 20000 and KCS

HDI Problem Management Professional (HDI-PM)
- Required: Operational Support & Analysis certificate (one of the intermediate ITIL capability modules)
- Highly suggested: ITIL Expert certificate

KCS Foundation
- Must be authorized to deliver the KCS Principles course

KCS Principles
- ITIL Foundation certification
- KCS Principles certification
- Minimum 3 yrs. experience with Knowledge Management

Section 2: HDI Certified Instructor Expectations

The below points were discussed in detail during your attendance of the HDI Certified Instructor course. In summary:

Etiquette and Professionalism

Each time you facilitate an HDI training course you are representing both HDI and your organization. We ask that you conduct yourself in a professional manner that elicits respect from the course participants. It is expected that each HDI Certified Instructor meet the course objectives each time they deliver an HDI training course. All HDI Certified Instructors shall demonstrate honesty, courtesy, accuracy, and capability during the facilitation of an HDI training course.

Attire for training course facilitation should be better business or business casual. For example, dress slacks and a collared button-down shirt for men or dress slacks or skirt with a collared button-down shirt or blazer for women. HDI Certified Instructors will always respect the dress code of the HDI partner and clients.

The Certified Instructor will arrive at least one half hour prior to the start of the class and use that time to get the classroom and media equipment set up. Begin the training course promptly according to the agenda published by the course sponsor.

Preparation for Course Delivery

Successful delivery of HDI training courses takes thorough planning. In order to deliver an exceptional learning experience for the course participants, you should understand the course flow and how to apply the course activities. You should also be very familiar with the course presentation files and all learning materials that relate to the course.

HDI encourages you to download all course materials from HDI's online Instructor Resources and begin preparing for course delivery at least two weeks prior to delivering your HDI training course.

Classroom Set-Up

HDI encourages you to consider a modified classroom set-up. Examples of modified classroom set up include a U-shape or semi rounds configuration. See your HDI Certified Instructor manual for sample illustrations. Modified classroom set up is learner-centered and is characterized by learners facing each other in order to foster communication and group activities and course participation.

You will need a video projector, slide advancer, and at least one flip chart or whiteboard to use during the delivery of your training course.

Staying Current

HDI Certified Instructors have an obligation to stay current with industry resources and trends. This means that you should be participating in any Train-the-Trainer opportunities that HDI provides, reading HDI communications and publications, and attending HDI or other industry conferences.

Active Certification Status

An HDI Certified Instructor must meet the following requirement annually in order to remain active as an HDI-CI:

1. Deliver HDI training to a minimum of 25 students.

2. Adhere to this Document of Understanding and abide by the HDI Certified Instructor Agreement.

3. Maintain your HDI Certified Instructor membership.

HDI reserves the right not to certify anyone who does not meet the criteria stated herein and to revoke certified instructor status with reason. HDI has the right to monitor classes with notice as part of our quality assurance program. All HDI Certified Instructors are expected to provide a quality experience, respect for both the customer and HDI, and demonstrate professional etiquette at all times.

Multi-course Authorization

After initial acceptance as an HDI Certified Instructor, certified instructors can earn authorization to instruct additional courses. The certified instructor must attend an instructor-led course for each course they desire to be authorized to deliver and pass the related exam at the mastery level (passing score of 90% or greater). Once the certification exam is passed at a mastery level, you can apply to be authorized to deliver that course. In addition, authorization to deliver some courses may also require you to meet with an HDI Business Associate and co-teach the course or receive additional training to re-deliver the course, thus receiveing authorization.

Some courses may pre-authorize the instructor to deliver a related course. For example, anyone authorized to deliver the HDI Support Center Analyst (HDI-SCA) course is automatically authorized to deliver the HDI Customer Service Representative (HDI-CSR) course. See the Course Pre-requisites section for more information.

Copyright Violations

For some courses, HDI provides videos, voice files, case studies, and articles as part of the course materials. HDI has obtained copyright clearance for the use of these additional resources. If you use additional resources outside of those provided, you do at your own legal risk. HDI will not be held liable for copyright violations.

Additionally, as an HDI Certified Instructor you agree not to copy or distribute HDI content which includes PowerPoint presentations, course files, videos, voice clips, etc. (e.g., all training deliverable that are copyrighted HDI) for any purpose other than facilitating your HDI course that you are authorized to train.

Section 3: Materials and Resources

HDI Online Instructor Resources

HDI has a secure web portal for all HDI Certified Instructors to access all release notes and course materials such as: PowerPoint presentations, certification standards, forms and templates, activities, videos, and voice files. Once you complete all of the HDI Certified Instructor requirements, you will be provided login credentials to access the HDI online instructor resources and have access to only those course resources you have been authorized for. Use this link to access the HDI online instructor resources: www.thinkhdi.com/instructors

Course Rosters

The HDI course roster is a form available for download from the HDI online instructor resources, under "Certified Instructor GENERAL Resources". This form is due via fax or e-mail to HDI within one business day of the course completion. Submit the form to training@thinkhdi.com or via fax to HDI at **866.373.7628.**
If the course roster is faxed in, please follow up with a phone call to ensure it was received.

This information is to include:

- Course participant's name

- Course participant's company name

- Course participant's **PRINTED** e-mail address

- Course participant's signature

You may want to consider pre-populating the course roster prior to the start of the class if you know the names of the course participants. Otherwise, please ensure the roster is legible.

When delivering courses for HDI, HDI partners or clients, the roster should be provided by them. Return a copy of the roster to the provider upon completing the course.

Certificate of Completion

As an HDI Certified Instructor, you can provide a certificate of course completion to your students. An HDI-approved certification of course completion template is available to download from the HDI online instructor resources, under "Certified Instructor GENERAL Resources".

The certificate of course completion is meant to acknowledge that a course participant has completed an HDI training course. The course participant can display the certificate on their workstation, or it can be filed in their employee file. For HDI sponsored courses, HDI will provide the completed certificates to the instructor at the start of the course.

1. Download the form at www.thinkhdi.com/instructors > Certified Instructor GENERAL Resources.

2. Enter the participant's first and last name, course name, and course date in the designated text boxes.

3. Enter your (instructor's) name in the bottom left text box.

4. Print each certificate to a color printer; you may want to use high quality paper.

5. Sign each certificate.

6. Distribute certificates at the end of the course.

Change Requests

If you need to submit a correction or recommendation for change, send an e-mail to training@thinkhdi.com and reference the course name, type of course material (e.g., course manual, PowerPoint, online practice test, voice file, etc.), unit, and page number. Your request for change will be submitted to an HDI Instructional Designer who will follow up with you.

Section 4: Support

Why Would You Need to Contact HDI?

Training Support	- Missing courseware order - Respond to certification exam issues - Set-up and process certification exams - Respond to course content issues - Respond to certified instructor issues
Learning Center Support	- HDI Learning Center outage - Resend login credentials - Respond to certification exam access issues - Provide level 1 technical support - Set-up and process exam extensions - Set-up and process exam retakes

HDI Customer Care Center

The HDI Customer Care Center is open from 7:00 am - 5:00 pm MST.

Phone: (800) 248-5667 – US

(719) 268-0174 – Worldwide

E-mail: support@thinkhdi.com

Fax: 866.373.7628

Web: www.thinkhdi.com

Service Levels

Service levels have been set based on industry best practices.

- Phone calls – 90% of calls answered within 15 seconds (about three rings)

- Web Request – 1 hour response time

- E-mail Request – 4 hour response time

- Fax Request – 4 hour response time

- Two day response time for all courseware orders received during posted business hours

- Course rosters – 2 business days to set up and activate certification exams from the time the course roster is received

- HDI Learning Center and HDI Website – 99% Availability

- Mean Time to Resolution for HDI Learning Center and HDI Website – within 1 business day

Escalation Procedures

To resolve customer issues, the HDI Customer Care Team has a three level escalation process in place based on the severity of the issue. Priority definition and escalation paths are defined in the following table. The escalation team consists of the HDI Customer Care Team, HDI Certification and Training Team, and HDI Information Technology Team.

The HDI Customer Care Team is first level support for all issues. The Customer Care Team may be contacted using the information provided above.

Priority Levels

Priority	Definition	Response Time	Escalation
1	**Business Critical** • Website outage • Learning center outage • Scheduled course recovery	**15 minutes**	**Immediate** • CCC Manager • Training logistics • IT Manager • HDI Learning Center Administrator • Executive Director
2	**Business Stopped** • Unable to process order • Unable to access HDI Learning Center • Unable to login to HDI website • Customer feedback with urgency	**1 hour**	**1 hour** • CCC Manager • IT Manager • HDI Learning Center Administrator
3	**Normal Business** • Standard requests • Order Processing • Invoice • Sales • Customer Inquires	**1 Business Day**	**1 Day** • CCC Manager
4	**Non-business Critical** • Customer comment • Customer feedback • Website content error • Vendor call	**2 Business Days**	**1 Week** • Appropriate Management