

ICT - Information and Communications Technology

ICT30118

Cert. III in Information, Digital Media and Technology

Unit

ICTSAS305

Provide ICT advice to clients

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Trainer/Teacher Manual



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STUDENT/TRAINEE DETAILS

Student/Trainee Name

Student/Trainee Email

Teacher / Trainer Name

School / Institution / Training Organisation / Employer

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INTRODUCTION

This manual is developed to provide training content that addresses the specific 'Unit of Competency' as outlined on the following pages.

It provides the teacher and/or trainer with a document that includes all that the student and/or trainee manual content plus guidance notes as well as answers to the learning activities in the student/trainee manual.

This manual can be packaged with various manuals addressing other 'Units of Competency' in order to meet the 'Packaging Rules' of a particular Australian Training Package Qualification.

This resource has been designed to be delivered in a form that is conducive to the learning environment including:

- ☆ Online delivery
- ☆ Classroom delivery
- ☆ On the job training

The documents are designed in a 'landscape' format in order to make reading on a computer screen easier as well as reduces the need to scroll down pages. Documents can be easily printed if the learning environment requires the student or trainee to have hard copies of the learning materials.

INTRODUCTION—CONT'D

LEARNING ACTIVITIES

The learning activities in the student and/or trainee manuals are 'Form Enabled' so that if the resources delivered online, the activities can be filled in using the computer keyboard.

Each learning activity is identified with the following icon.

**Learning
Activity**

Learning activities come in the following forms.

- ☆ Questions
- ☆ Research
- ☆ Tasks
- ☆ Interviews

Questions

Questions would relate to the information presented on previous pages.

Research

This type of learning activity would require the student or trainee to locate information by using research methods. The information they would be required to locate would be in line and/or support the information that the manual had outlined in previous pages.

INTRODUCTION—CONT'D**SAMPLE ONLY****Tasks**

This learning activity type would require the student/trainee to actually do or undertake something and would be reinforcing the knowledge they have gained from reading the manual's previous pages.

Interviews

This learning activity type would require the student/trainee to interview person(s) in an actual workplace environment or a person(s) who are experienced in the industry sector which the student/trainee is currently undergoing training.

The student/trainee is made aware of the type of learning activity by noting the learning activity type displayed under the learning activity icon.

**Learning
Activity****Research****SELF ASSESSMENT**

At the end of each manual is a series of questions that the student/trainee should review and answer.

This self assessment is to ensure in the student's or trainee's mind that they have reviewed and understood the information that was presented in their manual.

If they are unsure of their understanding in any of the topics reviewed, they are encouraged to go back and review the information again and/or seek the assistance of their teacher or trainer.

UNIT OF COMPETENCY OVERVIEW

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The following pages are extracts from Training.gov.au website and outlines this specific 'Unit of Competency' including the 'Elements' and the 'Performance Criteria'. The content within this manual has been developed to address this unit.

ICTSAS305 - PROVIDE ICT ADVICE TO CLIENTS

ELEMENT	PERFORMANCE CRITERIA
1. Review client support issues	1.1 Check for new problems logged by client 1.2 Check previous logs for similar problems or requests from client 1.3 Investigate and document support issues affecting client 1.4 Notify client of the results of investigation and provide advice and support on findings 1.5 Obtain client feedback and make changes
2. Provide advice on software, hardware or network	2.1 Confirm software, hardware or network requirements with client 2.2 Investigate and document a solution 2.3 Document additional requirements identified in the investigation and refer them to the client 2.4 Obtain approval from client to implement the solution 2.5 Investigate and document amount of technical support client may require 2.6 Discuss and agree level of technical support identified with client 2.7 Arrange time with client when support will take place 2.8 Provide technical support as part of group or one-to-one instruction to the client 2.9 Provide manuals and help documentation to client
3. Obtain client feedback	3.1 Create an appropriate evaluation or feedback form or other mechanism to gather feedback about solution and support provided 3.2 Provide client with instructions on how to complete form or use other means of providing feedback 3.3 Distribute evaluation or feedback to client 3.4 Review feedback from client to identify areas for improvement

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Section One

Review Client Support Issues

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Manual**

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PROVIDE ICT ADVICE TO CLIENTS

SECTION ONE—REVIEW CLIENT SUPPORT ISSUES

INTRODUCTION

In the ICT industry sector there are numerous vendors and suppliers of computer hardware and software products. Just like other types of products, there will be problems associated with using the products or the products failing.

This is why most vendors or suppliers of computer hardware and software products provide technical support staff that clients can contact for technical support.

This also includes larger organisations that have large and complex computer systems and would employ internal technical support staff that employees would go to for assistance.

In this section we look at technical support from a Help Desk point of view

SECTION LEARNING OBJECTIVES

At the completion of this section you will learn information relating to:

- ☆ Checking for new problems logged by client
- ☆ Checking previous logs for similar problems or requests from client
- ☆ Investigating and documenting support issues affecting client
- ☆ Notifying client of the results of investigation and providing advice and support on findings
- ☆ Obtaining client feedback and making changes



CHECK FOR NEW PROBLEMS LOGGED BY CLIENT

AND

CHECK PREVIOUS LOGS FOR SIMILAR PROBLEMS OR REQUESTS FROM CLIENT

(Over the next few pages we cover two 'Performance Criteria' points at the same time to avoid repetition)

For the purpose of these training materials, when we refer to a client this could mean a staff member in a larger organisation, or an external client seeking the advice and services of a ICT service provider.

In both scenarios we will be suggesting that the client will be making contact and seeking advice by way of a 'Help Desk', which is a term used to describe a department or a designated person to receive requests for advice and or support in ICT matters.

In the first section we focus on the 'Help Desk' (also known as the 'Service Desk') being the first contact point for clients that have a problem with either computer hardware (including peripherals) and/or software.

The 'Help Desk' concept was developed to ensure that the client's problem is efficiently as well as sufficiently addressed and resolved.

The Help Desk's approach to assisting clients is to have each problem a client has presented to the Help Desk 'logged' and in most cases this includes providing the client a 'case ticket' which is a number in which the client and the 'Help Desk' personnel use to identify the problem and track its progress.

In larger organisations this 'case ticket' is often used to categorise the client's problem. For example if the client's problem is a hardware related problem then the 'case ticket' would have a category number to suggest that the problem is related to hardware.

This 'ticketing' system is generally a software program that both logs and issues 'case ticket's, and then records those tickets in a database.

Clients can contact the Help Desk in numerous ways. If the Help Desk is internally based it could be by way of an email, telephone call or web based company form. If the Help Desk is externally based, the contact could be by way of a link on the service providers website or a 'toll free' telephone number.

SAMPLE ONLY

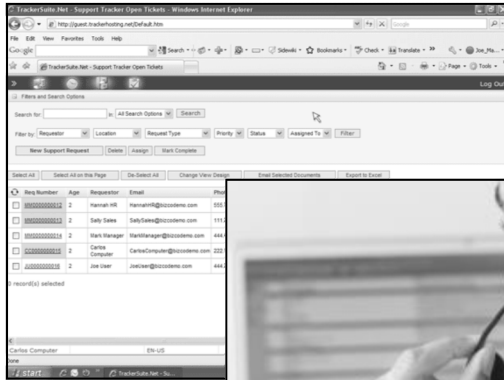
RECORDING CLIENT'S REQUESTS

If the request was logged using an electronic contact method (email, electronic forms or support links), then it is the responsibility of the Help Desk personnel to check for new problems logged by clients.

This could be by an automated alert that a client has electronically contacted the Help Desk or a Text Message to the Help Desk person on duty at the time.

If the Help Desk was contacted by telephone (or even in person), then the person Help Desk on duty would enter the client's request into the Help Desk database and provide a logged request 'case ticket'.

Often the information provided by the client is entered into the Help Desk database using a data entry form that is a feature of the Help Desk database software.

**SAMPLE ONLY**



CHECK PREVIOUS LOGS FOR SIMILAR PROBLEMS OR REQUESTS FROM CLIENT

When a problem has been reported, the first step of the Help Desk personnel is to check the Help Desk database to see if similar problems have been previously logged by the client. There are a number of reasons for this and some include:

- ☆ The hardware or software problem is one that is based on user lack of training and it is best to solve this and future problems by offering training.
- ☆ Previous problems would have had solutions and these would be reviewed suggesting a different approach to solving the same problem may be needed
- ☆ Previous problems that were resolved successfully previously would lessen the time to resolve the current one
- ☆ In an organisation with the same hardware or software being used by many users, then the database can be checked for similar problems logged by other users and if there were, it may be required to have the hardware or software vendors involved in resolving the problem

If the Help Desk is an internal organisational department, the Help Desk database is usually part of an organisation's 'Knowledge Base'.

A Knowledge Base is like a library, where all kinds of information on a wide range of topics or subjects are stored and made available to those in an organisation.

A well-organised 'Knowledge Base' can save an organisation money by decreasing the amount of staff time (in this case the Help Desk staff) spent trying to find information about past hardware and software problems and solutions.

So when we mention the 'Help Desk' databases, this is often means the organisation's 'Knowledge Base' if the Help Desk is an internal function.



SUPPORT TIER LEVELS

Generally, Help Desks have what they call levels of support that a client will be assigned to, based on what the problem is.

The common tiers are Tier 1, Tier 2 and Tier 3.

Tier 1 Support—This is the basic level of client support. And the Help Desk that is on duty would be a generalist with a broader understanding of the computer products or system, but might not understand the more complex inner workings of the system. He/ or she in this case would identify the client, clarify and log the problem and provide basic tips on solving the problem.

At this level of support, the Help Desk may refer to solutions found in a 'FAQ' developed by the Help Desk staff or a knowledge database of problems and related solutions that could be used in the majority of the client calls. In larger organisations especially those that supply complex hardware and/or software internationally, the Tier 1 support runs round the clock and in many cases is outsourced to third parties. When the Tier 1 is not able to handle the issue, the Help Desk classifies the problem into many types and then it is escalated to another support Tier. An issue tracking ticket might be issued to the client.

(We learn about 'escalation' shortly)

Tier 2 Support—Tier 2 level support involves technical knowledge and the Help Desk is staffed by more experienced technicians who have strong exposure to troubleshooting. The technician here is more specialised and will first determine if he or she will be able to offer solutions to the issue based on the data collected by the Tier 1 staff. If it is within the staff in the Tier 2 level, then it has to be determined if it is a new issue or an existing issue. Advanced diagnostic tools and data analysis is often done at this level.

However, if the solution is not easily possible, then it is escalated to the Tier 3, where it is typically assigned to the vendor of the hardware or vendor of the software.

Tier 3 Support—Tier 3 is a very specialised job provided by the specialists who are usually involved in the software development or have an engineering level of understanding of the hardware. The problem could be quite complex and they will collect as much data as possible from the previous two Tiers.



ESCALATION

When a client makes contact with a Help Desk, the 'case ticket' remains open until the client is completely satisfied that the problem has been solved.

We learned earlier about the three common 'Tiers of Support'.

If a Help Desk staff member cannot immediately solve a problem in the initial stages of the client's case, it will be passed to the technical support staff in the other Tiers. Where the Help Desk is part of the organisation's IT department, then the problem would be passed on to someone in the department with the technical capabilities to solve the problem.

In both cases this is called 'escalation'.

Call escalation procedures are defined by each company depending the size of the organisation and organisational guidelines.

Escalation may occur:

- ☆ According to an agreed set of rules
- ☆ If the initially assigned support person is not qualified to fix the problem
- ☆ When a client requests escalation
- ☆ When the problem type is immediately pre-defined as critical
- ☆ After initial attempts to fix a client's problem fail within a set time limit

The concept of escalation only works if :

- ☆ The Help Desk staff knows when to escalate a client's problem to an IT specialist and knows which IT specialist to escalate the problem to
- ☆ The person or department receiving the escalated problem responds quickly, especially those received by telephone
- ☆ The Help Desk is continually following up with the client (we learn about following up at the end of this section)

**Learning
Activity****SAMPLE ONLY****Interview****LEARNING ACTIVITY ONE**

In this activity we want you to interview six people that use PCs on a very regular basis.

We want you to ask them the following question:

- ☆ Have you ever contacted a Help Desk for a computer problem?
- ☆ How did you contact the Help Desk (e.g. telephone, Help Desk website, email, etc.)?
- ☆ What was the problem?
- ☆ Was the problem resolved by the Help Desk?
- ☆ If 'yes', were you happy with the service of the Help Desk or if 'no', how was the problem then resolved?

Compile your interview findings in a report form. Tell us the first name of the person you interviewed, their age and what suburb they live in. Also tell us what these people mainly use their PCS for.

Once your report is completed present it to your teacher or trainer for review and discussion.

TEACHER / TRAINER GUIDANCE NOTES

This activity will show the student or trainee that not all people who have contacted a Help Desk had a very good experience.

If the student or trainee should have at least four persons that have used a Help Desk to successfully complete this activity. You as the teacher or trainer may want to validate their interviews by asking for additional evidence about the persons they have interviewed.

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY TWO**

What is the difference between a Help Desk and a Service Desk?

TEACHER / TRAINER GUIDANCE NOTES

Generally there is no difference. In the ICT industry, the Help Desk term is slowly being replaced by the term Service Desk.

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY THREE**

What is a 'case ticket'?

TEACHER / TRAINER GUIDANCE NOTES

A 'Case Ticket' often generated by a software program allows the Help Desk to track and sort client requests with the help of a unique number. They then can frequently classify problems by user, computer program, or similar categories by using the case ticket.

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Task****LEARNING ACTIVITY FOUR**

In this activity we want you to develop a client log form that you think you would need if you worked on a Help Desk in a company that had many PCs and users. The form should focus on the hardware aspect of the PC.

When completed, the form should reveal all the information about the client, the PC and what the problem is.

Use an A4 format and when completed present your Help Desk client log form to your teacher or trainer for review and discussion.

TEACHER / TRAINER GUIDANCE NOTES

The form should include the following fields:

- ☆ A case number
- ☆ Date and time problem logged
- ☆ Client's name and department
- ☆ Client's contact details
- ☆ Type of PC
- ☆ Description of problem
- ☆ Is this the first time the problem has occurred?
- ☆ What attempts were made to resolve the problem before contacting the Help Desk?
- ☆ Name of Help Desk staff member filling in the form

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Task****LEARNING ACTIVITY FIVE**

In this Section we learned about the three 'Tiers of Support'. In your own words and as briefly as possible explain to us the difference between each Tier of Support.

Tier 1 Support***Tier 2 Support******Tier 3 Support*****SAMPLE ONLY**

SAMPLE ONLY**TEACHER / TRAINER GUIDANCE NOTES**

Tier 1 Support—This is the basic level of client support. The Help Desk that is on duty is a generalist with a broader understanding of the computer products or system, but might not understand the more complex inner workings of the system.

Tier 2 Support—Tier 2 level support involves technical knowledge and the Help Desk is staffed by more experienced technicians who have strong exposure to troubleshooting.

Tier 3 Support—Tier 3 is a very specialised job provided by the specialists who are usually involved in the software development or have an engineering level of understanding of the hardware.

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY SIX**

In this Section we learned about 'escalation' and five reasons why a client's 'case ticket' may be escalated. What were those five reasons?

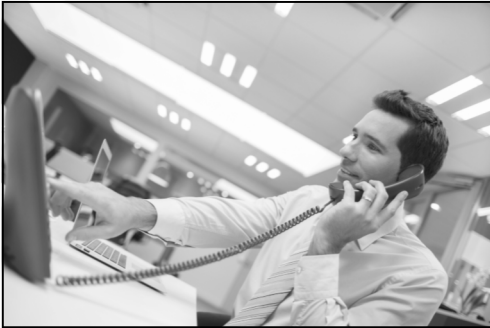
SAMPLE ONLY

SAMPLE ONLY***TEACHER / TRAINER GUIDANCE NOTES***

Escalation may occur:

- 1) According to an agreed set of rules
- 2) If the initially assigned support person is not qualified to fix the problem
- 3) When a client requests escalation
- 4) When the problem type is immediately pre-defined as critical
- 5) After initial attempts to fix a client's problem fail within a set time limit

SAMPLE ONLY



INVESTIGATE AND DOCUMENT SUPPORT ISSUES AFFECTING CLIENT AND NOTIFY CLIENT OF THE RESULTS OF INVESTIGATION AND PROVIDE ADVICE AND SUPPORT ON FINDINGS

(Over the next few pages we cover two 'Performance Criteria' points at the same time to avoid repetition)

Help Desks or (Service Desks) do not always help clients through hardware or software problems.

There is a wide range of other issues that would require clients to contact Help Desk staff, both internally as well as externally.

Some of these would include:

Time it is taking to resolve a problem already logged in the system—If the client's problem is creating significant disruption or hardship, then they would expect the problem addressed quickly and resolved quickly. Not getting regular updates on the progress of their 'case' only causes further frustration to the client.

In these cases the Help Desk staff would need to investigate what has happened to the client's 'case' and report back to the client. When the client has to chase up the Help Desk for information is a problem in itself and this would need to be logged and documented, so future types of support issues can be avoided.

Service Level Agreements (SLA) - Many organisations will purchase hardware and/or software packages and these are serviced and maintained by the vendor under what is known as a Service Level Agreement or SLA. Basically, a SLA defines in detail what support the client can expect from the vendor. There will be times when the vendor fails to provide the promised support. In these cases the client will contact the Help Desk staff and report these support issues.

Again, the Help Desk staff would need to investigate the support issue and report back to the client. The client having to chase up the Help Desk and report a support issue is a problem in itself and this would need to be logged and documented, so future types of support issues can be avoided.

SAMPLE ONLY

Training—Another support issue often handled by the Help Desk is training. An organisation may purchase new hardware and/or software and as part of the purchase there may be a certain level of training provided by the vendor. If the training is insufficient and the organisation's staff are struggling with the new hardware and/or software, then the first point of call will be the Help Desk.

Details why the training was lacking would be logged and documented by the Help Desk and then whatever further training required would be investigated and reported back to the client. This information would be used by the vendor to adjust their level of support to clients especially in the area of training.

Warranties—Repairs to hardware are often organised with the vendor through the Help Desk. There will be times when the client expects the repairs to be performed for free under a warranty agreement in place.

Warranty terms and conditions would need to be met if the vendor was to repair any hardware under warranty. So this means that the Help Desk staff would need to document all the details of the hardware as well as the needed repairs and then investigate whether the warranty agreement would cover those repairs. Then the Help Desk staff would inform the client of the decisions.

Priority support—There will be times that a client has a critical problem needing quick resolution and when the Help Desk is contacted the client is insisting immediate attention given to the problem. This means the Help Desk needs to prioritise the problem and this could require additional resources from the vendor (or if an internal request, then additional IT staff).

The problem would be logged and what resources required would be investigated and documented. The client would then be notified on how and who would be addressing the problem given the critical nature of the problem.

SAMPLE ONLY

SAMPLE ONLY

KEEPING THE CLIENT INFORMED

One of the most important tasks of any ICT support person, whether on a Help Desk or hands on fixing the problem, is keeping the client informed of the progress of their support issues or problems.

This is very important in instances where the Help Desk has passed on the problem to others. The person who is actually assigned the problem needs to introduce themselves as quickly as possible to the client. If it is an internal request, this may mean going to the user with the problem in person.

Keeping in contact with the client could be for many other reasons, such as the problem is taking longer to be resolved than first anticipated.

Good communication skills are essential. From the very start you need to fully understand the client's needs or problems and this involves using good questioning skills, as well as active listening skills.

There are many times when clients make requests which they perceive as simple, but which are not easily carried out by ICT technicians, as they involve excessive cost, or will result in a breach of organisational guidelines.

In these cases the Help Desk needs to be able to explain to the client why it is not possible to carry out their requests and be able to suggest alternative actions, which will allow the client to resolve their own problems or technical issues.

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY SEVEN**

In this Section we reviewed support issues that Help Desks may need to deal with. There were two issues that were mentioned both were related to some sort of an agreement. What were those two types of agreements?

TEACHER / TRAINER GUIDANCE NOTES

- 1) Service Level Agreements (SLA)
- 2) Warranty Agreements

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY EIGHT**

When communicating with a client we mentioned the importance of communication skills. One we mentioned was 'Active Listening'. What is active listening?

TEACHER / TRAINER GUIDANCE NOTES

Active listening is when a person is giving their undivided attention to what the other person is saying and using body language such as nodding to ensure the other person knows that they are being listened to. If it is on the telephone, then the other person will often ask clarifying questions so as to have the other person realise they are being listened to.

SAMPLE ONLY

SAMPLE ONLY

OBTAIN CLIENT FEEDBACK AND MAKE CHANGES

When the Help Desk staff are confident that the client's IT problem or support issues have been resolved then it is a common industry practice to seek the client's feedback on the solutions or resolutions.

This is for a few reasons, such as the client may have a different view on whether the problem or issue actually has been fixed or resolved to their satisfaction.

The methods used or the way the client's problems or issues were handled may be questioned or criticised by the client and these need to be addressed and documented.

There may be times when the client tells the Help Desk staff that the solution they proposed was unworkable, too expensive, too disruptive or so on.

If this feedback is not sought then the Help Desk and its staff has failed in its role of client support and client service.

Seeking and obtaining feedback allows the Help Desk staff to make changes to how they approach and solve certain problems or issues and make those changes so all clients can confidently tell the Help Desk staff that they are happy with the service and resolutions.

In Section Three of these training materials we go into more detail on how to seek feedback from clients including feedback mechanisms that could be considered.

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Task****LEARNING ACTIVITY NINE**

Fill in the missing words using the words from the word bank using each word only once.

_____ feedback is always great, but _____ feedback has the potential to provide valuable _____ on where or how your business processes or _____ service can be _____. It also presents an _____ for you to address a client _____ or concern and turn their experience into a _____ one.

WORD BANK

opportunity, positive, insights, positive, client, improved, complaint, negative

TEACHER / TRAINER GUIDANCE NOTES

Positive feedback is always great, but negative feedback has the potential to provide valuable insights on where or how your business processes or client service can be improved. It also presents an opportunity for you to address a client complaint or concern, and turn their experience into a positive one.

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Section Two

Provide Advice on Software, Hardware or Network

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PROVIDE ICT ADVICE TO CLIENTS

SECTION TWO—PROVIDE ADVICE ON SOFTWARE, HARDWARE OR NETWORK

INTRODUCTION

In the previous section we learned the importance of the Help Desk as a contact point where clients can receive advice mainly in solving hardware and software problems as well as dealing with actual client support issues.

In the ICT industry there is another form of providing clients advice and that is in the area of hardware and/or software choices, installation and training.

We look at these topics in this section.

SECTION LEARNING OBJECTIVES

At the completion of this section you will learn information relating to:

- ☆ Confirming software, hardware or network requirements with client
- ☆ Investigating and documenting a solution
- ☆ Documenting additional requirements identified in the investigation and referring them to the client
- ☆ Obtaining approval from client to implement the solution
- ☆ Investigating and documenting amount of technical support client may require
- ☆ Discussing and agreeing level of technical support identified with client
- ☆ Arranging time with client when support will take place
- ☆ Providing technical support as part of group or one-to-one instruction to the client
- ☆ Providing manuals and help documentation to client



CONFIRM SOFTWARE, HARDWARE OR NETWORK REQUIREMENTS WITH CLIENT

In the previous section we focussed on the support aspect of the ICT industry from a Help Desk point of view both as an external support service as well as one that is set up internally in an organisation.

The Help Desk concept as a service provides clients advice on properly operating computer hardware and/or software, including resolving functional problems or failures.

However, advice is also requested by clients on the choice and the sourcing of new or additional computer hardware and/or software and this is not considered a Help Desk function.

Circumstances when a client may need advice on computer hardware (including peripherals) and/or software could include:

- ☆ Upgrading the organisation's computer system or network
- ☆ Expanding the current computer system or network
- ☆ A specific requirement requiring specialised hardware and/or software

In these cases the organisation may go to a hardware or software vendor to seek advice, to a consultant that specialises in providing advice on ICT needs or the internally employed technical staff in the organisation.

Whoever the organisation goes to, the initial steps in providing ICT advice is the same, learning, clarifying and understanding the needs or requirements of the client.

Over the next few pages we want you to place yourself in the position of providing ICT advice to a client.



IDENTIFY AND EVALUATE CLIENT REQUIREMENTS

The two most important skills you would need to develop are questioning and listening skills. Without those skills you would be unable to determine what a client is wanting.

The first thing you must remember is that when you ask a client a question, you need to wait for an answer.

Then you are able to evaluate what the client has told you and then you can start formulating a possible solution.

Within the ICT industry there are an endless amount of computer hardware types as well as software being on offer.

As we know now that no matter what type of computer hardware or software is put forward, it must match the needs of the client.

Generally there are common client needs or requirements that affect the suitability of the type of hardware or software that will be proposed.

These client needs or requirements would include:

- ☆ Durability, function and usage
- ☆ Client's existing skills and knowledge on the hardware or software usage
- ☆ Price and affordability
- ☆ Availability
- ☆ Support

It is important that throughout this initial stage of identifying the client's requirements that you clarify any aspect of those requirements you do not fully understand.

A good communicator listens as much as they speak. It is important to asking questions until both you and the client feel that each have a full understanding of their requirements.

It is possible that a client is unsure of their exact requirements. In this situation, questions and resulting answers may start off in very general terms. However, as the questioning continues, the requirements of the client become more defined and you will be able to formulate a solution.

**Learning
Activity****SAMPLE ONLY****Task****LEARNING ACTIVITY ONE**

In the area of workplace communication, questioning skills are important skills to develop. In this activity we want you to do some research and tell us what each of the following types of questions mean as well as give us an example of each.

Open ended questions definition

Open ended questions example _____

Closed ended questions definition

Closed ended questions example _____

SAMPLE ONLY

SAMPLE ONLY***Reflective questions definition******Reflective questions example*** _____***Clarifying questions definition******Clarifying questions example*** _____***TEACHER / TRAINER GUIDANCE NOTES***

Open ended questions require the person answering the question to provide an answer with some detail included. Example could be “Why does your organisation wish to upgrade your computer network?”

Closed ended questions generally require only a yes or no answer, or a simple one or two word answer. An example could be “How many workstations do you need?” or “Are you looking at new software as well?”.

Reflective questions are questions that provoke some thought by the person answering the question. An example could be “You mentioned that the company has had problems with their current hardware. Would this be because you have outgrown your computer system?”

Clarifying questions are questions that ask the person to explain something again, or say it in a different way so you can get a better understanding on what they are saying. An example could be “What did you mean when you said that the software is not suitable for your needs?”

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY TWO**

What three examples did we mention in this Section why a client would need advice on hardware and/or software?

TEACHER / TRAINER GUIDANCE NOTES

Circumstances when a client may need advice on computer hardware (including peripherals) and/or software could include:

- 1) Upgrading the organisation's computer system or network
- 2) Expanding the current computer system or network
- 3) A specific requirement requiring specialised hardware and/or software

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY THREE**

What were the five common client needs or requirements we mentioned in this Section?

TEACHER / TRAINER GUIDANCE NOTES

Common client needs or requirements usually include:

- 1) Durability, function and usage
- 2) Client's existing skills and knowledge on the hardware or software usage
- 3) Price and affordability
- 4) Availability
- 5) Support

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Research****LEARNING ACTIVITY FOUR**

There is a Greek philosopher called Epictetus who came up with a saying that is used in workplace communication training.

The first part of his saying goes like this:

We have two ears and one mouth so we can ...

We want you to first finish the saying and then tell us what communication skill was Epictetus referring to.

The completed saying...

The communication skill _____

TEACHER / TRAINER GUIDANCE NOTES

“We have two ears and one mouth so we can listen twice as much as we speak.”

The communication skill is listening.

SAMPLE ONLY



INVESTIGATE AND DOCUMENT A SOLUTION AND

DOCUMENT ADDITIONAL REQUIREMENTS IDENTIFIED IN THE INVESTIGATION AND REFER THEM TO THE CLIENT

(Over the next few pages we cover two 'Performance Criteria' points at the same time to avoid repetition)

Your level of technical knowledge is dependent on what role you play when providing advice to a client. If you work for a hardware or software supplier your technical knowledge will be confined to the products that your employer has to offer.

However, if you were an external consultant or work in the IT department of a larger organisation, then you would need to do some research and investigate the possible hardware or software solutions on the market that would meet the client's requirements.

There are two main research methods you can use:

- 1) Direct information gathering
- 2) Indirect information gathering

1) Direct method

Gathering direct information is the best form of research and the most reliable form of acquired knowledge. It involves personal research and requires you to gather the information from reliable sources. Direct information should be the type of information you concentrate on. Examples of places from which you can gather direct information can include:

- ☆ Product brochures, product specification documents, service brochures, the internet
- ☆ Trade magazines, product and service reports, product and service reviews
- ☆ Training sessions, product demonstrations, tradeshow
- ☆ Vendor representatives
- ☆ Personal experience with the hardware or software

SAMPLE ONLY

2) Indirect method

Indirect information is the next best form of research and should only be used as support information for direct information gathering. Do not base your product knowledge on indirect information.

Indirect information can come from other sources, for example, other clients who have used the hardware/software may give valuable feedback, as can friends, other suppliers, etc.

Always take indirect information and confirm its reliability from what you already know. Genuine product information, using the product yourself and other sources can help to confirm this indirect information.

SAMPLE ONLY

SAMPLE ONLY

ANALYSING VENDOR TECHNICAL INFORMATION AND SPECIFICATIONS

We have just reviewed two of the main methods of research that should be considered when starting to formulate a solution for the client.

We touch on a source of information as being hardware and/or software specification and technical documents.

If you worked for a hardware or software vendor, these would be readily available. This information and additional information from technical staff within the vendor's organisation will ensure the hardware and/or software solution will satisfy the client's requirements.

If you are working for a hardware or software vendor, you can be reasonably confident that the client is also seeking advice from your competitors, so it is important to find out what the others could be offering.

When researching your competitor look at reviews, ask other clients that may use the software or hardware and locate any technical information about the competitor's hardware or software.

Also try and find out what additional services they may offer and any perceived competitive advantages, such as pricing, product range, or level of client service.

If you are an independent consultant or an internal technical staff member, then all the technical specifications and information would need to be closely analysed and aligned with the requirements of the client.

SAMPLE ONLY



OTHER CONSIDERATIONS

Locating hardware and software to meet the client's requirements is not the only step in formatting a solution to meet those requirements.

There are other considerations that need to be taken into account before finalising a proposed solution and these would likely included:

- ☆ How an existing computer system or network will impact on the implementation of your proposed solution
- ☆ What are the overall business goals of the organisation and how will your proposed solution impact those goals
- ☆ Are you clear on who the stakeholders are that will be affected by the implementation of your proposed solution such as the end-users, management and other technical staff
- ☆ Are your methods of developing a solution and proposing a solution in line with the organisational guidelines?

Both you and the client would need to have a basic agreement of the scope of the project, the budgetary goals and when a proposal needs to be made available.

On the subject of organisational guidelines, the organisation will likely have policies and procedures regarding who the documentation will be presented to that outlines the proposed solution, as well as who is involved in the decision making process.

DOCUMENTING A SOLUTION

After you have completed your research and investigated all possible solutions, it is time to document what the proposed solution(s) that would satisfy the client's requirements are.

ICT documentation can be quite technical, so it is important to determine the audience in which the document is to be read. When it comes to describing computer hardware and software, it can be difficult to avoid using highly technical terms or industry jargon.

However, from a technical point of view it is sometimes impossible not to offer any solutions without going into technical detail.

The skill of writing a technical report and proposal is something that anyone who is asked to provide ICT advice should learn.

Accompanying these training materials is a supplement training manual called 'Writing Technical Reports and Proposals'. This manual goes into detail on how to write a proper technical document that would meet the needs of a wide variety of audiences.

Your teacher or trainer will likely refer you to this manual while completing this unit.



SAMPLE ONLY

DOCUMENTING ADDITIONAL AND/OR CHANGING REQUIREMENTS

After you have completed your research and investigated all possible solutions, there likely will be additional requirements that surface and need to be included in the proposed solution.

For example, the new servers being proposed require an air-conditioned environment, so the organisation will need to dedicate a separate room for the servers, provide air-conditioning and additional cabling will be required.

The client may also change the requirements and these new requirements need to be taken into account before finalising the proposed solution.

For example, the original scope was for six workstations and the client has now increased that to ten, as a result, the overall budget will need to be changed as well as the software licences and so on.

In the documentation, these additional and/or changed requirements need to be quite clearly highlighted, and how that will affect the organisational project scope and the impact on the budget (if any).

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY FIVE**

What were the two research methods we learned about in this section and what type should not be used on it's own?

TEACHER / TRAINER GUIDANCE NOTES

There are two main research methods you can use:

- 1) Direct information gathering
- 2) Indirect information gathering and this method should not be used only on its own; merely as support information that was sourced using the direct method

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY SIX**

If you were employed by a hardware or a software vendor and you were developing a hardware or software solution for a client, why would you seek out information about your competitors and how would you use that information?

TEACHER / TRAINER GUIDANCE NOTES

If you are working for a hardware or software vendor, you can be reasonably confident that the client is also seeking advice from your competitors, so it is important to find out what the others could be offering.

When researching your competitor look at reviews, ask other clients that may use the software or hardware and locate any technical information about the competitor's hardware or software.

Also try and find out what additional services they may offer and any perceived competitive advantage such as pricing, product range, or level of client service.

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY SEVEN**

What were the four other main considerations that should be taken into account when developing a solution for your client?

TEACHER / TRAINER GUIDANCE NOTES

- 1) How an existing computer system or network will impact on the implementation of your proposed solution?
- 2) What are the overall business goals of the organisation and how will your proposed solution impact those goals?
- 3) Are you clear on who the stakeholders are that will be affected by the implementation of your proposed solution, such as the end-users, management and other technical staff?
- 4) Are your methods of developing a solution and proposing a solution in line with the organisational guidelines?

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY EIGHT**

When providing a document outlining a hardware and software solution to a client from a technical point of view, it is sometimes impossible not to offer a solutions without going into technical detail. Accompanying these training materials is a supplement training manual called 'Writing Technical Reports and Proposals'. This manual goes into detail on how to write a proper technical document that would meet the needs of a wide variety of audiences.

In this supplement training manual it explained how to ensure that readers that are not technically knowledgeable could be catered for when reading a technical report or document. How is this done?

TEACHER / TRAINER GUIDANCE NOTES

In technical reports there is likely the need to provide a 'Definitions' section. This assists the less technically minded readers to understand some of the more technical terminology as well as the definition of any symbols, unique names or abbreviations that may be used.

This page is sometimes called the 'Glossary'.

SAMPLE ONLY



OBTAIN APPROVAL FROM CLIENT TO IMPLEMENT THE SOLUTION

Once the solution has been documented and distributed, the next stage would be to obtain approval to implement the solutions.

Before the approval is given, you should be prepared to answer questions about various aspects of your proposed solutions.

You would also need to be prepared for modifications to your proposal document. It could be for a variety of reasons. However, before finalising and signing off on the implementation project, check and see what impact the project will experience due to the modifications. So it is suggested that you go back, make the modifications to the document and then seek approval again.

The document should include a 'revision' notation, the date the revision was made to the document and what the revision was, including the page reference.

APPROVAL METHODS

There are a few common ways of formalising the approval of the implementation of a proposed hardware or software solution. The choice on which one to choose often depends of the size of the project, the costs of the project and the organisational guidelines of both the client and the vendors of the hardware and/or software.

The options are:

- ☆ The proposal document includes a signoff page where all parties sign the document after it has been fully reviewed, revised and agreed to
- ☆ In some cases an organisation will issue a formal purchase order and have the proposed document attached to this purchase order
- ☆ In large projects a more formal contract may be drawn up using the details extracted from the proposal document

Whatever option is chosen, it is strongly recommended that it is in writing and those signing off on the proposed solutions are authorised to do so.

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY NINE**

What are the three approval mechanism options that could be used when obtaining approval from a client in order to implement a proposed hardware or software solution?

TEACHER / TRAINER GUIDANCE NOTES

- 1) The proposal document includes a signoff page where all parties sign the document after it has been fully reviewed, revised and agreed to.
- 2) In some cases an organisation will issue a formal purchase order and have the proposal document attached to this purchased order.
- 3) In large projects, a more formal contract may be drawn up using the details extracted from the proposal document.

SAMPLE ONLY



INVESTIGATE AND DOCUMENT AMOUNT OF TECHNICAL SUPPORT CLIENT MAY REQUIRE

Part of the advice you provide on hardware and/or software would likely include what technical support the client require when the solution was being implemented.

This client support could include:

- ☆ Getting through the installation process
- ☆ User training
- ☆ Maintenance
- ☆ Help Desk services
- ☆ SLAs (Service Level Agreements)
- ☆ User and technical manuals

The time you investigate what technical support the client may require would often be while you are investigate the hardware and/or software solutions. If you were working for a hardware or software vendor, then the company would have a clear idea on what technical support would be required when installing and using their hardware or software.

Vendors of hardware and/or software would tend to suggest what level of support a client would need and provide this information to independent IT consultants or you if you were working internally in the organisation seeking a hardware and/or software solution.

In most cases this technical support information would be documented and included in the final solution proposal document.

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY TEN**

What were the six main areas of client support often required when implementing a hardware and/or solution for your client?

TEACHER / TRAINER GUIDANCE NOTES

This client support could include:

- 1) Getting through the installation process
- 2) User training
- 3) Maintenance
- 4) Help Desk services
- 5) SLAs (Service Level Agreements)
- 6) User and technical manuals

SAMPLE ONLY



DISCUSS AND AGREE LEVEL OF TECHNICAL SUPPORT IDENTIFIED WITH CLIENT

On the previous pages we learned that technical support covers many aspects of a new hardware and/or software installation and implementation project.

High on the list and probably the most important technical support requirement would be training. To determine the level of training needed by the client requires a reasonable amount of discussion with the client as well as input from the client.

To reach the agreed level of training required, the following questions need to be discussed and answered:

- ☆ What are the learner's existing knowledge and skills?
- ☆ What is the complexity of the skills to be taught?
- ☆ Is there a time frame to teach these skills?
- ☆ Are there others in the organisation who need more or less the same type of training?
- ☆ What training resources are needed (e.g. manuals and textbooks)?
- ☆ When is the client and/or users available for training?
- ☆ What type of training should be given (one-on-one or group)?
- ☆ Where should the training take place (in house or at an external training centre)?
- ☆ What is the organisation's budget for this training?

Once the answers to these questions are documented, a 'training needs analysis' would be required. The analysis would reveal gaps in training needs.

For example —different levels of training needed for different learners (novice, advanced, high-user or technical training). The analysis would focus on what the learner needs to know in order for them to perform the task, so it is important to find out what they already know. The training needs to be valuable and appropriate to this particular learner or group.



There are also those barriers to learning that need to be identified, discussed with the client and an agreement reached on how to overcome those learning barriers.

Barriers to learning could include:

- ☆ Learner availability
- ☆ Learner disabilities
- ☆ Cultural issues
- ☆ Negative attitudes toward learning something new

To do a training needs analysis often requires a significant amount of time and most of the information would be gathered by:

- ☆ **Interviews**—informal interviews with users often reveals the amount of technical training required
- ☆ **Testing**—the user could be given a few tasks to do using the new technology and this would reveal their current level of skills and what training they would need.
- ☆ **Observation**—watching the user perform their daily tasks using the old technology could reveal areas where they may struggle when new technology is introduced.

Once the training needs are identified and documented, it is important that the client agrees with the training plan.

The agreement should be formalised whether it be signed off in the initial solution proposal document or separated out as a formal training contract. If the training plan has been developed in house by you as part of the IT department, then a senior manager of the organisation needs to sign off on the training plan. This shows the commitment of the organisation's management towards the training.

**Learning
Activity**

SAMPLE ONLY

Question

LEARNING ACTIVITY ELEVEN

To reach an agreed level of training requires nine questions need to be discussed and answered? What are they?

SAMPLE ONLY

SAMPLE ONLY**TEACHER / TRAINER GUIDANCE NOTES**

- 1) What are the learner's existing knowledge and skills?
- 2) What is the complexity of the skills to be taught?
- 3) Is there a time frame to teach these skills?
- 4) Are there others in the organisation who need more or less the same type of training?
- 5) What training resources are needed (e.g. manuals and textbooks)?
- 6) When is the client and/or users available for training?
- 7) What type of training should be given (one-on-one or group)?
- 8) Where should the training take place (in house or at an external training centre)?
- 9) What is the organisation's budget for this training?

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY TWELVE**

What were the four barriers to learning that were reviewed in this Section?

TEACHER / TRAINER GUIDANCE NOTES

Barriers to learning could include:

- 1) Learner availability
- 2) Learner disabilities
- 3) Cultural issues
- 4) Negative attitudes toward learning something new

SAMPLE ONLY



ARRANGE TIME WITH CLIENT WHEN SUPPORT WILL TAKE PLACE

SAMPLE ONLY

The technical and user training is something that can be disruptive to an organisation, so attention to a well developed training timetable needs to take place.

Providing training or technical support you will also need to consider the priorities of the client. There are two important things to keep in mind when developing a training timetable 1) the need to avoid any disruptions to the client's operations and 2) the need to have the right users available for training at a time that is suitable for the client and the user(s).

This will involve considerable negotiations to come up with a suitable time for technical training to be provided. Often there is a significant number of people affected by proposed training, however for maximum benefit you need to make sure the right people will all be available.

Arranging technical training would also include the need to arrange a suitable location for the training. For example, some organisations will give up their boardroom for training sessions. This too can be disruptive to the management who may have regular management meetings in the boardroom.

If it is an external location, then the training rooms would need to be booked and the booking schedule align with the trainee's availability.

Also, it is important to remember that the person doing the training must be available. Some trainers may come from other parts of the country. Depending on the project this may require two or more trainers, so the task of developing a training timetable can be a juggling act.

In some projects much of the training starts when the installation of the hardware and/or software begins. The benefits of this arrangement is that the users gain reasonable training in the new technology before they actually have to use it.

Once the training timetable has been agreed to, it needs to be distributed to all those affected and well enough in advance that if there are changes required, that these changes can be made without significant problems being created.

The most difficult changes to accommodate are those made at the last minute. Last minute changes can also be costly. For example, some trainers may come from interstate, so they may fly in and stay over during the training period. If changes are made, travel costs may increase, especially if interstate trainers need to return.

Additional costs that may be incurred for absenteeism and training timetable changes should be highlighted to the client. This often reduces the occurrence of absenteeism and training timetable changes.

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY THIRTEEN**

What are two main considerations when creating a training time table?

TEACHER / TRAINER GUIDANCE NOTES

There are two important things to keep in mind when developing a training timetable 1) the need to avoid any disruptions to the client's operations and 2) the need to have the right users available for training at a time that suitable for the client and the user (s).

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY FOURTEEN**

What are the benefits of starting user training at the same time as the hardware or software is being installed?

TEACHER / TRAINER GUIDANCE NOTES

The benefits of this arrangement is that the users gain reasonable training in the new technology before they actually have to use it.

SAMPLE ONLY



PROVIDE TECHNICAL SUPPORT AS PART OF GROUP OR ONE-TO-ONE INSTRUCTION TO THE CLIENT

In providing technical training support the other consideration is the type of training that should be provided. The types of training are numerous. Types of training are totally dependent on the time available to the learner and the acceptable expense. It also depends on the nature of the training as well as how many employees are to be trained.

There are five common training methods used by organisations today. They are:

- ☆ On-the-job training
- ☆ Classroom training
- ☆ One-on-one
- ☆ Coaching
- ☆ Self-paced training

Let's look at each type in some detail.

ON-THE-JOB TRAINING

This training takes place at the organisation's workplace or workstation. It is generally focussed on skills required for a specific function or task when using new technology. The training period is relatively short – maximum two to three weeks. Any longer and a classroom setting with more intense instruction is usually recommended.

CLASSROOM GROUP TRAINING

This method is usually for a number of users being trained on the same subject and the training is more than three weeks in duration.

The classroom is either away from the job or a separate training room in the workplace and is equipped for training purposes, such as duplicating the workplace environment as close as possible.

Classroom group training is also effective where during the course of training numerous mistakes can be expected. This allows the learner to learn by their mistakes in a safe environment away from customers, suppliers, etc. where mistakes could reflect badly on themselves as well as the organisation

**ONE-ON-ONE TRAINING**

One-to-one training enables the training to be tailored to be more suitable for individual learners. This results in accelerating the learning process, as well as enabling the learner to provide immediate feedback about the training. One-to-one instruction is generally more costly than classroom training, but under some circumstances it is necessary when the trainee has specific training needs not common with others.

COACHING

This is where experienced work colleagues come in. These types of persons will have the necessary knowledge and skills to help along others in certain areas where they may need training. This type of training would be used when the implementation of new technology is being managed 'in house'.

Coaching can be a formal or informal method of training. In a formal setting the employee is trained and closely supervised and helped along by an experienced colleague.

In an informal setting the person coaching a colleague is always made available to answer questions or assist in areas where a learner needs help or improvement. Most coaching efforts should be aimed at an identifiable need.

SELF PACED TRAINING

Self-paced training is becoming more and more popular with companies. In some cases it is difficult for organisations to release employees for extended periods of training time.

A learner can access learning content modules online, CD ROMs, audiovisual materials, study guides as well as other resources that focus on the employees training needs. These are used at a pace acceptable to both the organisation, as well as the employee.

The technical Help Desk is also a good training resource. In many cases it is available 24/7 and can assist the learner through many of their training needs.

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY FIFTEEN**

What are the five methods of training that many organisations would or could use?

TEACHER / TRAINER GUIDANCE NOTES

- 1) On-the-job training
- 2) Classroom training
- 3) One-on-one
- 4) Coaching
- 5) Self-paced training

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY SIXTEEN**

What qualities does a person need if some of the training in an organisation is provided through 'coaching'?

TEACHER / TRAINER GUIDANCE NOTES

These types of persons will have the necessary knowledge and skills to help others along in certain areas where they may need training. In an informal setting the person coaching a colleague is always made available to answer questions or assist in areas where a learner needs help or improvement. Most coaching efforts should be aimed at an identifiable need.

SAMPLE ONLY

PROVIDE MANUALS AND HELP DOCUMENTATION TO CLIENT

When installing new hardware or software in an organisation, there is a need to provide user manuals and other documentation that relates to the use and maintenance of the new technology.

These are generally produced by the hardware or software vendors.

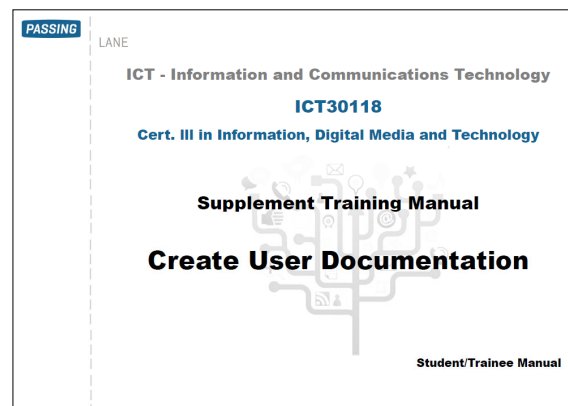
When it comes to training, these manuals are good reference materials, while training and for those times when a user needs some information after training.

In certain circumstances, training materials may need to be developed. This is often the case when the new technology being installed is customised to a specific organisation and the vendor's users manual are too general in its content.

Training materials may also be needed where the trainees level of technical comprehension is not sufficient enough to understand the technical terminology used in the vendor's manuals.

Accompanying these training materials is a supplement training manual called 'Create User Documentation'. This manual goes into detail how to write a simple but effective user document that would meet the needs of a varying technical levels learners and users .

Your teacher or trainer will likely refer you to this manual while completing this unit.



**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY SEVENTEEN**

Although vendors of hardware and software supply user documentation and manuals, there are many times when training manuals need to be created as well. Why is this often the case?

TEACHER / TRAINER GUIDANCE NOTES

This is often the case when the new technology being installed is customised to a specific organisation and the vendor's users manuals are too general in their content.

Training materials may also be needed where the trainees level of technical comprehension is not sufficient enough to understand the technical terminology used in the vendor's manuals.

SAMPLE ONLY

SAMPLE ONLY

Section Three

Obtain Client Feedback

SAMPLE ONLY

**Teacher/Trainer
Manual**

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PROVIDE ICT ADVICE TO CLIENTS

SECTION THREE—OBTAIN CLIENT FEEDBACK

INTRODUCTION

Any service provider needs to know if they are meeting their client's needs and this is also true with those providing ICT advice.

In this section we learn how to seek feedback from clients and what the feedback information is used for.

SECTION LEARNING OBJECTIVES

At the completion of this section you will learn information relating to:

- ☆ Creating an appropriate evaluation or feedback form or other mechanism to gather feedback about solution and support provided
- ☆ Providing client with instructions on how to complete form or use other means of providing feedback
- ☆ Distributing evaluation or feedback to client
- ☆ Reviewing feedback from client to identify areas for improvement



CREATE AN APPROPRIATE EVALUATION OR FEEDBACK FORM OR OTHER MECHANISM TO GATHER FEEDBACK ABOUT SOLUTION AND SUPPORT PROVIDED AND PROVIDE CLIENT WITH INSTRUCTIONS ON HOW TO COMPLETE FORM OR USE OTHER MEANS OF PROVIDING FEEDBACK

(Over the next few pages we cover two 'Performance Criteria' points at the same time to avoid repetition)

After the hardware and software has been installed and the training completed, it is highly recommended that you seek feedback from the users as well as the client.

If you work for a hardware or software vendor or as part of a IT consulting business, they may already have feedback or system evaluation forms or other types of feedback mechanisms.

If you work on your own as a consultant or as part of an internal technical team, then you may be required to create your own feedback or system evaluation forms or other types of feedback mechanisms.

The critical things you need to discover from the feedback include:

- ☆ Did the hardware and/or software system solution meet the requirements of the client?
- ☆ Was the training of the level where the users are reasonably competent in the new technology?
- ☆ Does the level of technical support (aside from the training) meet the client's expectations?
- ☆ Does the user and technical documentation meet the client's needs?

Traditionally the most economical way to gain feedback from a group of people was to use hardcopy questionnaires. However today, there are numerous feedback form templates available, some are even free.



TYPES OF FEEDBACK OR EVALUATION QUESTIONS

There are basically two types of feedback questions—open and closed ended questions. Earlier, we learned about each.

Some closed-ended questions can only be answered by selecting from a certain number of responses. For example: *'Have you received any training manuals in using the UNIX operating system?' [] Yes [] No*

But other closed-ended questions may involve degrees of agreement with a statement. A good deal of research has shown that offering respondents a range of five levels of agreement with such closed-ended questions is a good compromise between making the answer too complicated and giving the respondents a reasonable latitude for their answers.

For example: *'I found the training good.'*

Strongly disagree ____ *Disagree somewhat* ____ *Uncertain* ____ *Agree Somewhat* ____ *Strongly Agree* ____

Whatever form of questioning you decide to use, some principles to bear in mind include:

- ☆ Use simple, clear, nontechnical language. People cannot respond to questions that they don't understand.
- ☆ Use the minimum number of questions. People are very busy and quickly become annoyed with answering questions which they see as being of little relevance.
- ☆ Use a method that will be convenient for respondents to access. If answering questions is too difficult, people will avoid answering them.

There will be times when the feedback form is designed in an attempt to gather as much feedback as possible and the client and/or users may need to be encouraged to fill in the feedback forms and may even need some assistance to fill them in.



Sometimes it may be preferable to gain feedback through interviews with users rather than by using questionnaires. A major advantage of this technique is that users can elaborate on their comments and discuss their answers with one another. This may turn out to be a simple form of brainstorming that can sometimes lead to creative solutions. Also, people often find it less laborious to talk than to write answers; so they may be more willing to give complex feedback orally rather than in writing.

Disadvantages associated with using personal interviews include:

- ☆ The higher costs related to having someone conduct the interview rather than merely analysing statistics gained from using a questionnaire
- ☆ The fact that users may be influenced or misled by one another during group meetings
- ☆ The greater time and money costs to the client's company associated with arranging for users to leave their normal work to attend group (or even individual) interviews

Remember also, that if you use the interview method instead of questionnaires you will still need to maintain your own accurate objective records of the responses given during the interviews.

If you are ever uncertain what a respondent actually means on a questionnaire or during an interview, you should contact them directly to ask for further clarification.

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY ONE**

Whatever form of questioning you decide to use in your feedback forms, what three principles should you bear in mind?

TEACHER / TRAINER GUIDANCE NOTES

Whatever form of questioning you decide to use, some principles to bear in mind include:

- 1) Use simple, clear, nontechnical language. People cannot respond to questions that they don't understand.
- 2) Use the minimum number of questions. People are very busy and quickly become annoyed with answering questions which they see as being of little relevance.
- 3) Use a method that will be convenient for respondents to access. If answering questions is too difficult, people will avoid answering them.

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Research****LEARNING ACTIVITY TWO**

In this activity we want you to locate three websites that offer customisable feedback form templates. Tells us the name of the product and their website address.

TEACHER / TRAINER GUIDANCE NOTES

The student or trainee will not have a lack of examples to use in this activity. It is good for the student or trainee to be exposed to such a wide variety of feedback form options.

SAMPLE ONLY



DISTRIBUTE EVALUATION OR FEEDBACK TO CLIENT

There are several ways that the feedback forms (or evaluation forms) can be distributed to the client and the users.

We mentioned earlier that the more traditional method is a printed hard copy sent to the client and each user.

This may be a reasonable method in smaller organisations, however there are numerous electronic methods.

Still using the hardcopy method, the form as a Word or a PDF file can be attached to an email with instructions on how to fill the form in. In this method the client/users would simply print out the form, fill it in and return it back to you.

To avoid having to print out the form, the PDF can be 'formed enabled' meaning that the fields where answers are inserted can be done online, saved and emailed back without the need of printing a hard copy.

Survey forms can also be developed as online versions and placed on the organisation's websites, instructions and links to the forms provided by email.

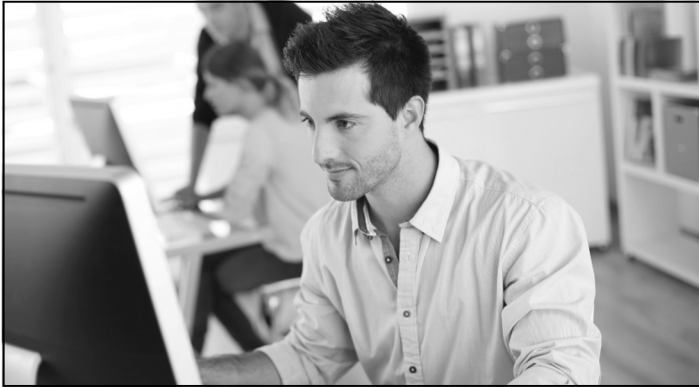
**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY THREE**

List the ways a feedback form can be distributed.

TEACHER / TRAINER GUIDANCE NOTES

Hard copy, by email or online.

SAMPLE ONLY

SAMPLE ONLY

REVIEW FEEDBACK FROM CLIENT TO IDENTIFY AREAS FOR IMPROVEMENT

When you have collected your feedback, by whatever method you employ, you will then need to analyse it. When working with only a few users, analysing feedback should be a relatively simple operation.

However when dealing with many users, and/or complex survey instruments analysis can be enhanced and made more efficient by using computer-based databases and/or spreadsheets. Data from databases and even word processor tables, can be exported into spreadsheets for further statistical analysis and the production of charts.

When analysing the data, pay particular attention to similar answers from more than one respondent or multiple responses that seem to point to a particular area of concern.

For example different respondents might indicate in various ways that they find the training too technical. Perhaps the system is not quite providing what the client was expecting, or the peripheral is not keeping up with the organisation's needs

Always bear in mind when analysing users feedback that it is the users and the client -- not yourself -- who actually have taken the training and are using the new technology.

Don't dismiss their comments too readily without very good reason.

We should be able to use feedback information to inform us about how we went at meeting the client's requirements and should also let us identify ways to improve our service in the future.

SAMPLE ONLY

**Learning
Activity****SAMPLE ONLY****Question****LEARNING ACTIVITY FOUR**

What does one look for when analysing feedback and how should we use feedback information?

TEACHER / TRAINER GUIDANCE NOTES

When analysing the data, pay particular attention to similar answers from more than one respondent or multiple responses that seem to point to a particular area of concern.

We should be able to use feedback information to inform us about how we went at meeting the client's requirements and should also let us identify ways to improve our service in the future.

SAMPLE ONLY

SELF ASSESSMENT

Self assessment is where you ask yourself certain questions to ensure you have understood what you have learned while reading this manual and completing the learning activities.

This unit requires you the student or trainee at the completion of your training to have a certain level of 'Required Knowledge' in which you would be need to have acquired and in which you will be assessed on.

This self assessment section reviews this required knowledge by way of questions and if you are able to say YES to all of them you can be confident your assessment will be satisfactory.

- ☆ Do you remember what levels of IT assistance the following Tiers provide;
 - A) Tier 1?
 - B) Tier 2?
 - C) Tier 3?
- ☆ Can you recall some of the reasons a client would seek assistance from a Help Desk other than hardware or software problems?
- ☆ Are you able to understand the importance of obtaining feedback from a client after their IT problems or issues have been resolved?
- ☆ Do you know the types of circumstances that a client may have that would require advise regarding the choice of new or additional computer hardware and/or peripherals?
- ☆ Are you able to understand the three options of approval methods that can be used when implementing a proposed hardware or software solution?
- ☆ Do you remember the various types of technical support that may be required when providing hardware and/or software?
- ☆ Can you recall how to gather information in order to do a training analysis?
- ☆ Do you know how the following types of training methods are implemented;
 - A) On-the-job training?
 - B) Classroom training?
 - C) One-on-one?
 - D) Coaching?
 - E) Self-paced Training?

SAMPLE ONLY

- ☆ Can you describe the circumstances that may arise that would require training manuals to be developed for a client?
- ☆ Are you able to understand some of the disadvantages of using personal interviews in order to gain client feedback?
- ☆ Do you remember how to distribute evaluation or feedback to a client?

If there were any questions that you were unable to confidently say YES to, we encourage you to review the information again in this manual and if needed seek the assistance of your teacher or trainer.

SAMPLE ONLY

SAMPLE ONLY

NOTES

SAMPLE ONLY

**Teacher/Trainer
Manual**

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