

Lesson # 1

Effective Help Desk Specialist Skills

Chapter 1

Introduction to Help Desk Support Roles

Lesson #: 1

Objectives

- Understand the Support Center
- Understand the Role of the Help Desk Professional
- Understand Users
- Review Typical Incident Process

Understanding the Support Center

- The purpose of an IT support center is to provide technical support to users.
 - This includes starting (or booting) a computer, logging on, configuring a computer, configuring and running applications, and accessing network resources.
 - The support center might support users within the same organization or, in other cases, the support center might support external customers of the organization.
 - The help desk is a cost center instead of a profit center.
 - A profit center generates revenue for a company and includes departments such as sales and marketing.
 - A cost center generates additional costs for a company without bringing in any direct revenue.

Understanding the Support Center (cont.)

- It's important to understand two key terms: **incident** and **incident management**.
- You can think of an incident as a problem. Customers typically report the problem to the help desk and the help desk technicians take steps to resolve it. An organization implements incident management processes to ensure that all incidents are resolved to the best ability of the organization.
 - An **incident** is an unplanned interruption or a reduction in the quality of an IT service. It can also be the failure of a fault tolerant or redundant solution designed to increase the availability of a service.
 - **Incident Management** includes all processes and procedures used to deal with incidents. Incidents might be reported by users, by technical staff, or from automated tools that perform event monitoring and reporting.

Understanding the Support Center (cont.)

- Organizations often divide an IT department into several different divisions.
- Personnel working within these divisions can focus on specific IT requirements and become experts within that area.
- Some common divisions:
 - Help Desk
 - Infrastructure
 - Servers
 - Security
 - Software

Understanding the Support Center (cont.)

- Organizations typically organize support to their customers in separate levels, or tiers.
- Most organizations that use tiers have three internal tiers, and some identify a fourth external tier.
 - **Tier 1.** Help desk personnel are tier 1 and provide basic support to users.
 - **Tier 2.** Technicians with a higher level of knowledge, experience, and permissions work at tier 2 and can assist tier 1 technicians to resolve more complex problems.
 - **Tier 3.** The highest tier in most organizations is tier 3. Administrators and technicians at this tier troubleshoot and resolve the most difficult or complex problems.
 - **Tier 4.** Many organizations have **service-level agreements (SLAs)** with outside organizations. An SLA stipulates the performance expectations and identifies support services provided by the vendor.

The Role of the Help Desk Professional

- The help desk professional is often the “face” of the IT staff that customers see and, right or wrong, customers often make judgments about the entire organization based on their interactions with a help desk professional.
- Successful help desk technicians require a wide range of skillsets. These skillsets are often categorized as hard skills and soft skills.
 - **Hard skills** are specific, measurable skills such as configuring and troubleshooting systems.
 - **Soft skills** refer to the ability to communicate effectively with others. In short, hard skills can often get you an interview while soft skills can get you the job.

The Role of the Help Desk Professional (cont.)

- Hard skills are specific abilities that can be taught and measured.
 - **Technical skills** refer to the technician's ability to configure, maintain, and troubleshoot IT systems. These skills vary between organizations and even between specific jobs within an organization.
 - **Security skills** have become more and more important in recent years. Attackers and criminals are constantly waging attacks on individuals and organizations of all sizes.
 - **Troubleshooting skills** refer to the ability of a technician to identify and resolve a problem. The highest tier in most organizations is tier 3, and administrators and technicians at this level troubleshoot and resolve the most complex problems.
 - **Business skills** refer to the technician's understanding of the organization's vision, mission, and values, in addition to the ability to use tools available within the organization.

The Role of the Help Desk Professional (cont.)

- Soft skills are associated with personal attributes and indicate how successfully individuals can work with other people in teams and how effectively they can interact with users.
 - **Communication skills.** Effective communication is extremely important in IT support job roles. Technicians need to question the user to get adequate information on a problem without taking on a tone of interrogation. Two important communication skills are using open-ended questions and active listening.
 - **Personal skills.** Personal skills refer to someone's ability to manage different situations and manage themselves. A core personal skill is attitude.
 - **Writing skills.** Superior written communication is one of the most important soft skills for help desk technicians.
 - **Training skills.** In many cases, technicians provide training to users so that the users can resolve problems on their own the next time they occur.

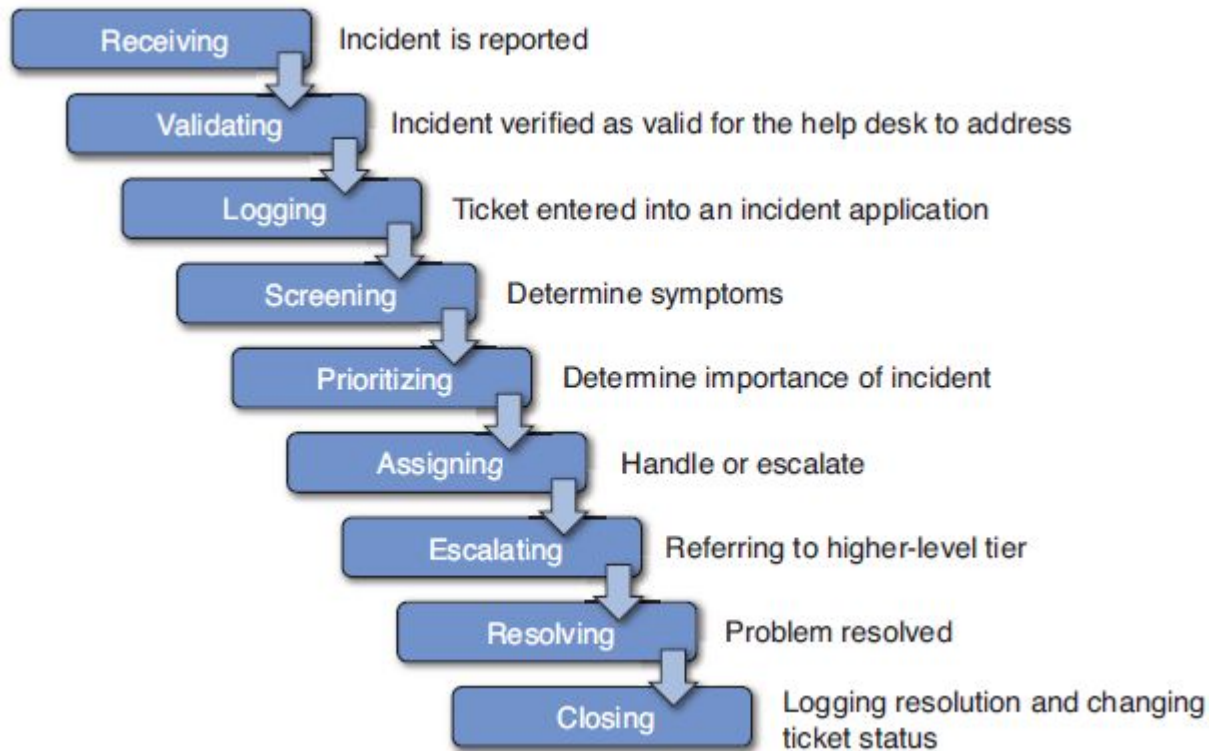
Understanding Users

- A primary purpose of help desk professionals is to support users. With this in mind, it's important to understand them. Different types of users have different needs and skillsets and will have a wide variety of different problems. When the help desk understands the users, their common characteristics, and their needs, they are better equipped to help them.
- One of the simple user categories is based on the user's relationship to the organization.
 - Internal users work in the same organization as the help desk, and help desk personnel typically prioritize incidents based on the user requesting assistance.
 - External users are customers of the organization. Often, an organization is selling some other product or service and the help desk technicians assist customers having a problem with the product or service. This assistance might be via email, chat, or phone.

Understanding Users (cont.)

- Services provided to users:
 - Logging on
 - Asking for information
 - Starting an application
 - Installing or upgrading software
 - Configuring or troubleshooting hardware
 - Using or performing a task with an application
 - Accessing a network resource
 - Removing viruses or other malware
 - Recovering data
 - Rolling back changes
 - Understanding errors and messages

Typical Incident Process



Lesson 1:

Summary

- Reviewed the Support Center
- Reviewed the Role of the Help Desk Professional
- Reviewed Users
- Reviewed Typical Incident Process

Next Lesson: Chapter 2, “Communication Skills”