e-Quals Unit Syllabus

Level 3 Customer support provision 3

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Unit 502 Customer support provision 3

Rationale

This unit will enable the candidate to provide technical customer support and understand the processes involved in improving the way in which customers use networked ICT systems.

Learning outcomes

There are **five** outcomes to this unit. The candidate will be able to:

- Provide technical support to customers
- Gather and evaluate feedback from customers on improving technical support provision
- Analyse trends to improve customer use of IT
- Provide remote technical customer support
- Provide coaching in technical skills for customers

Guided learning hours

It is recommended that 60 hours should be allocated for this unit. This may be on a full time or part time basis.

Connections with other qualifications

This unit contributes towards the knowledge and understanding required for the following qualifications:

NVQ for IT Professionals (4324) Level 3

Outcome	Unit
2	303.4 Relevant methods of measuring customer satisfaction
2	306.1 Relevant client/customer needs
2	306.2 Defects which can arise in information
1	309.1 The products or services to be supported
1,2,4	309.2 Organisational requirements of customer care
1,4,5	316.1 The appropriate uses of advice and guidance
3	316.4 Technical information to form the basis for advice and guidance
1,3,4,5	317.1 Appropriate uses of diagnostic methods
1,3,4,5	317.2 The purpose for which diagnostic information is required
1,3,4,5	317.3 The diagnostic process to be followed

Key Skills

Application of number	N/A
Communication	2.1, 3.2, 3.3
ICT	2
Working with others	N/A
Problem solving	3
Improving own learning	2

Assessment and grading

Assessment will be by means of a **set assignment** covering both practical activities and underpinning knowledge.

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Outcome 1 Provide technical support to customers

Practical activities

The candidate will be able to:

1 determine customer requirements for ICT systems and services support

2 respond to individual customer requests for technical support using different communication techniques

   a verbal

   b written

   c practical methods

3 use manual/written or electronic methods to record details of the customer request and the outcome giving details such as

   a customer

   b problem

   c date and time of call

   d date and time of first response

   e action taken

   f time of resolution

4 obtain technical support information from other sources, eg manufacturer's help desk, website

5 record and escalate unresolved technical support requests following agreed processes.

Underpinning knowledge

The candidate will be able to:

1 explain the reasons for providing a prompt and professional response to customer requests for technical support

2 describe the reason for using a structured approach when questioning customers in response to support requests, eg to

   a reach a conclusion as soon as possible

   b ascertain all symptoms and events leading up to them

   c identify additional problems

3 describe when to use different methods of technical support provision

4 explain the reasons for maintaining accurate records of

   a requests for technical support

   b the nature of the problem

   c the type of response given

   d the method of resolution and outcome

5 describe the reasons for recording/logging customer technical support requests, and their outcomes

6 describe typical procedures for escalating technical support problems which cannot be resolved immediately

7 describe the relevant legislation and regulations concerning confidentiality and health and safety in the provision of support

8 state when to invoke different escalation procedures, eg

   a vertical

   b horizontal

   c technical

   d administrative

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Outcome 2 Gather and evaluate feedback from customers on improving technical support provision

Practical activities

The candidate will be able to:

1 design suitable tools (eg questionnaires, log sheets, etc.) for gathering effective feedback from customers to improve technical support provision

2 obtain feedback from customers using the designed tools

3 analyse feedback gathered and prepare a report detailing the results of the analysis and recommendations for improvements.

Underpinning knowledge

The candidate will be able to:

1 describe the factors which affect the design of tools used to gather information from customers, eg questionnaires, satisfaction forms, response rates, level of detail, telephone calls

2 describe the importance of extracting and organising relevant information from the data, eg faults, problems, grievances, complaints, delays, level of understanding, standard or level of service

3 explain that positive conclusions should be drawn from analysed data, identifying for instance

   a recommendations for action

   b suggestions for improvement

   c areas of responsibility.

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Outcome 3 Analyse trends to improve customer use of IT

Practical activities

The candidate will be able to:

1 obtain support records or logs (can be provided by the tutor to reflect local situations), eg unit logs, call records, site logs

2 analyse the support records or logs identifying patterns of customer support request

3 write a report recording the analysis and making recommendations for improvement

4 prepare an action plan to implement the recommendations.

Underpinning knowledge

The candidate will be able to:

1 identify types of support records or logs which may be used to determine trends in customer support requests, eg unit logs, call records, site logs

2 describe trends that may occur in support requests eg

- a recurring requests from individual
- b recurring requests about particular problems
- c requests about specific products or services.

3 explain common causes for recurring requests, eg

- a poor user skills
- b poor media
- c intermittent fault
- d other external influences (poor environment, inadequate system for workload)

4 describe the process for resolving recurring requests by identifying, eg

- a the causes of the pattern(s)
- b possible resolutions
- c responsibilities
- d further information required and from whom, and by when
- e agreeing the resolution with the customer
- f implementing the resolution

5 describe the main points which should be included in an action plan.

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Outcome 4 Provide remote technical customer support

Practical activities

The candidate will be able to:

1. determine the customers' requirements for technical support in a remote situation, eg
   - a advice and guidance
   - b fault diagnosis
   - c remote fault rectification
2. use available diagnostic tools to remotely investigate and inspect a system or system components as part of a fault-finding process, eg
   - a diagnostic modes
   - b third-party utilities
   - c boot disks
   - d start-up disks
   - e system tools
3. guide a remote user through a fault-finding process by suggesting checks or tests on a system to
   - a confirm a problem has been accurately reported
   - b identify the cause of an unspecified problem
4. record the fault-finding process and the results of tests or checks reported by the customer
5. advise on the corrective action to be taken to restore a system to working order and to confirm problem resolution.

Underpinning knowledge

The candidate will be able to:

1 describe and give examples highlighting the differences between hardware and software related faults, eg

   a possible hardware problem – symptoms displayed by one hardware device with different software control and/or independent of software control

   b possible software problem – symptoms affecting more than one hardware device

2 explain the reasons for structured testing during troubleshooting processes

3 describe and give examples of the use of diagnostic tools and when they

   might be used (eg diagnostic modes, third-party utilities, boot disks, start-up disks or system tools)

4 describe the steps that should be taken in fault-finding and correction when communicating with a user by telephone, eg

   a validate the call

   b ensure clear understanding of the problem

   c advise user of appropriate steps to carry out

   d obtain feedback on results

   e analyse the results

   f recommend corrective action

   g establish successful resolution

5 explain why structured fault-finding techniques should be applied to any fault situation on the system

6 describe a routine and a non-routine problem, eg

   a routine – one that occurs on a regular and frequent basis, is simple to resolve using standard procedures

   b non-routine – occurs less frequently, requires deeper knowledge and more troubleshooting methods to resolve.

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Outcome 5 Provide coaching in technical skills for customers

Practical activities

The candidate will be able to:

1 identify types of customer and their knowledge requirements, eg
   - a data input operator
   - b document producer
   - c CAD technician
   - d software designer
   - e sales/marketing
   - f financial dealer
   - g telephone help-line
   - h demonstration
   - j writing instruction handouts
   - k formal training sessions
   - l peer-to-peer support

2 identify technical skills required by the customer and prepare a coaching plan

3 provide coaching to the customer in technical skills

4 obtain feedback regarding the effectiveness of the coaching

5 evaluate coaching delivered and make recommendations (eg by observation of the customer using new skills in an operational situation).

Underpinning knowledge

The candidate will be able to:

1 describe different coaching methods, giving examples of when each is suitable, eg
   - a telephone help-line
   - b demonstration
   - c writing instruction handouts
   - d formal training sessions
   - e peer-to-peer support

2 describe why obtaining feedback and evaluation is important for improving the effectiveness of the coaching, eg
   - a continuous improvement
   - b optimising future output.

Unit record sheet

Use this form to track your progress through this unit.

Tick the boxes when you have covered each outcome. When they are all ticked, you are ready to be assessed.

Outcome	✓	Date
1 **Provide technical support to customers**	☐	
2 **Gather and evaluate feedback from customers on improving technical support provision**	☐	
3 **Analyse trends to improve customer use of IT**	☐	
4 **Provide remote technical customer support**	☐	
5 **Provide coaching in technical skills for customers**	☐	

Candidate Signature ..... **Date** .....

City & Guilds Registration Number .....

Quality nominee (if sampled) ..... **Date** .....

Assessor Signature ..... **Date** .....

External Verifier Signature (if sampled) ..... **Date** .....

Centre Name ..... **Centre Number** .....

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