INFORMATION TECHNOLOGY SUPPORT SERVICE
Level I

LEARNING GUIDE #39

Unit of Competence : Record Client Request Requirements

Module Title : Recording Client Request Requirements

LG Code : ICT ITS1 M11 L02-LG-39

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LO 2: Prioritize support requests with appropriate personnel

Instruction Sheet	**Learning Guide # 39**

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics –

- Identifying Relevant guidelines

- Prioritizing Client requests

- Referring Requests to an appropriate person or department

- Involving Appropriate persons with client support to be communicated

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, upon completion of this Learning Guide, you will be able to –

- Identify relevant guidelines for prioritizing or rating client requests.
- Prioritize client request based on its criticality or impact on the business.
- Refer the request to an *appropriate person* or department for assistance.
- Communicate to appropriate persons involved with client support.

Learning Activities
1. Read the specific objectives of this Learning Guide.

2. Follow the instructions described below 3 to 6.

3. Read the information written in the information "Sheet 1, Sheet 2, Sheet 3 and Sheet 4".

4. Accomplish the "Self-check 1, Self-check t 2, Self-check 3 and Self-check 4" **in page -4, 6,,8 and 16** respectively.

5. If you earned a satisfactory evaluation from the "Self-check" proceed to "Operation Sheet 1 " **in page -17.**

6. Do the "LAP test" **in page – 18**.

- Your teacher will evaluate your output either satisfactory or unsatisfactory. If unsatisfactory, your teacher shall advice you on additional work. But if satisfactory you can proceed to the next topic

Information Sheet 1	**Identify Relevant Guidelines**

1.1. Organizational Guidelines

Organizational guidelines are the **policies or procedures** that are used to correctly perform a specific activity or operation within an organization. Here, we used the organizational guidelines to prioritize client support requirements.

- Polices are basically guides to the organization's philosophy and mission and help to interpret those elements to the officers.
- Procedures are more specific than polices; they serve as guides to action.

1.2. Identifying Relevant Guidelines For Prioritizing Or Rating Client Requests

There should be some mechanism used to prioritize service request that come from clients. In many organizations there are rules and policies that govern prioritization issues. The most important factor taken into consideration is:-

- **Business Critical System** – the interruption of such system directly affects the production, profit of the organization or the business. It results in bankruptcy, frustration, disappointment etc

- **Urgency of the service requested-** This method requires you to sort tasks into the following categories and rate them according to the level of priority.
  - ✓ important and urgent
  - ✓ important and not urgent
  - ✓ not important but urgent
  - ✓ not important and not urgent

Self-Check -1	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. which of the following is used as a guide to the organization philosophy and mission.
   A. Policy   B. Procedure   C. Standards
2. _____used to sort tasks in to categories according to the level of priority.
   A. Urgency of the service requested B. procedure C. organization
3. _____are more specific than polices.

A. Policy B. procedure

Note: **Satisfactory rating - 3 points**   **Unsatisfactory - below 3 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = _____

Rating: _____

Name: _____   Date: _____

Information Sheet 2	Prioritize client requests

2.1. Prioritize client requests based on criticality or impact on the business

Some client support requests will be allocated a high priority, as they involve critical IT functions which cannot be carried out until the problem is resolved. Extra resources may have to be allocated to high priority support needs, and the progress of these support needs to be closely monitored.

The most common ways of prioritization mechanisms are using the following general guidelines but its best to respond to all requests as quickly as possible.

1. **High Priority:** - high priority is given where the business critical system has got a problem.
   - A significant number of people are affected by an issue, a customer's computer crashed, the network server is down, a virus attack, or there is a security concern.

   Example:

   The user is unable to login; the computer crashed; a customer's account is locked or the password needs to be reset; a computer has been infected by a virus; an entire student lab is down; if the network is inaccessible.

2. **Medium Priority:** A single customer is affected by a problem but is still able to work, or there are problems with a service but it is still functional.

   Example:

   A customer is experiencing intermittent computer problems; is unable to open or work within a software program; is having printer problems; has lost access to a file share; or requires data recovery/backup.

3. **Low Priority:** Routine or maintenance tasks.

   Example:

   A customer asks "how to" questions or requests new software installations or computer set up. The department requests account creations or updates, directory changes, or new file shares.

Self-Check -2	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. Which of the following priority is a routine task.
   - A. High
   - B. Middle
   - C. low
   - D. All

2. It is best to respond to all request as quickly as possible.
   - A. True
   - B False

Note: **Satisfactory rating - 3 points   Unsatisfactory - below 3 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = _____

Rating: _____

Name: _____   Date: _____

Information Sheet 3	Refer Request to appropriate person

3.1. Referring requests to appropriate person or department for assistance

- This stage is the step at which we refer client support requirements to respected technician or department to give the support needed by the client.
- Appropriate person in the contest of IT is a supervisor, teacher, vendor business representative, help desk person or subject matter expert Technician that is responsible for answering the technical question of clients and the goal is to create value for clients that will help preserve company's reputation and business.
- We are looking for a competent **Help desk technician** to provide fast and useful technical assistance on computer systems
- An excellent Help desk technician must have good technical knowledge and be able to communicate effectively to understand the problem and explain its solution. They must also be customer-oriented and patient to deal with difficult customers.

- The goal is to create value for clients that will help preserve the company's reputation and business

3.1.1. Responsibilities of It Help Desk
- Serve as the first point of contact for customers seeking technical assistance over the phone or email.
- Perform remote trouble shooting through diagnostic techniques .
- Walk the customer through the problem solving process.
- Direct unresolved issue to the next level of support personnel.
- Provide accurate information on IT products or service.
- Record events and problems and their resolution in logs.
- Follow-up and update client status and information.
- Pass on any feedback by clients to the appropriate internal team.
- Identify and suggest possible improvement on procedure.

3.1.2. Requirement of IT Help Desk
- Proven experience as a help desk technician
- Good understanding of computer system.
- Ability to diagnose and resolve basic technician issues
- Proficiency in English
- Excellent communication skill
- Customer oriented and cool tempered.

Self-Check -3	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. Which of the following is not the responsibilities of help Desk Technician?
   A. Direct unresolved issue to the next level of support personnel.
   B. Provide accurate information on IT products or service.
   C. Record events and problems and their resolution in logs
   D. nonek

2. Good understanding of computer system is one aspect of Help Desk Requirment.
   A. True   B. False

3. One is not the requirement of an IT help desk.
   A. Excellent communication skill
   B. Good understanding of computer system
   C. Customer oriented
   D. None

Note: **Satisfactory rating - 3 points   Unsatisfactory - below 3 points**
You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = _____

Rating: _____

Name: _____   Date: _____

Short Answer Questions

1.List at least three responsibilities of an IT Help Desk Technician

Information Sheet 4	Involve Appropriate persons with client support to be communicated

4.1. Contacting the client

If you are the support person who has been contacted by the help desk, you need to contact the client soon after receiving their request from the help desk. You'll also need to investigate and document the issues raised by the client.

The contact with the client may be just letting the client know that you're on the way to see them at their workstation. As mentioned previously, non-complex client problems can be resolved quickly. The solution may be as simple as providing a short set of instructions, which the client can follow to fix their problem.

At other times, you may need to contact the client for other reasons, including the following situations:

- If the problem is more complex, and likely to take time to resolve, the client needs to be informed of this.

- You want to clarify with the client exactly what their needs are. To do that effectively, you'll need good communication skills, including skills in active listening and reflective questioning.

- You cannot meet the initial target completion date because of other competing deadlines and you want to re-negotiate the priority (or the completion date) with the client. Successful changes to completion dates come about through successful negotiations. This is the result of building up good client relations.

It is important for you to keep the client informed about the progress of their call. Frustration over delays in solving IT problems can be a major cause of concern to people. This frustration can be made worse by poor communication from IT support staff. As a result of your investigations, you should be able to inform the client about the nature of the solution. You should also be able to tell the client how long it will take to resolve the problem.

Clients can often make requests which they perceive as simple, but which are not easily carried out by IT support staff, as they involve excessive cost, or will result in a breach of organisational guidelines. In these circumstances, you will need to be able to explain to the client why it is not possible to carry out their requests. You should be able to suggest alternative actions, which will allow the client to perform the same tasks.

4.1.1. Obtaining client feedback

There are a number of reasons why it is important for you to obtain client feedback. Is the solution you are proposing workable? Clients may be aware of issues which you have not considered, which may mean that your suggested solution will not be practical. These can be many and varied, but could include budgetary constraints, specific needs of clients such as clients with a disability, disruption of client access to IT systems, or loss of client data.

4.1.2. Listening to the client

When you're dealing with clients and colleagues, it's vital that you listen carefully and respond appropriately. To do this, people often use the **active listening** technique.

Active listening occurs when you focus on the message you're receiving from the other person, without thinking about what you want to say next. Your response to the sender is one that paraphrases what you've heard. That is, you summarise what you've heard, and say it back to the sender in your words. This ensures that you have understood the idea the sender wants to give you.

You can often tell if someone is really listening to you, if they are:

- smiling

- nodding

- staying silent

- making eye contact

- using a friendly and interested tone of voice

- encouraging you to continue

- asking open questions

- reflecting how you (the speaker) are feeling.

- leaning towards you (the speaker).

4.1.3. Asking reflective questions

A reflective question allows the other person to correct and clarify any misunderstandings you may have about what is being said. If you echo back what a client has told you, the client then has a chance to either agree with you, or point out things you have missed or misunderstood.

4.1.4. Documenting client feedback

The Help Desk Operator has given you a client's request to attend to. The Help Desk Operator had filled in a few general details about the client request. It wasn't possible to resolve the problem by telephone, so you need to investigate the problem further and record more details. You'll need to contact the client to find out more.

You've seen an example of the initial details recorded at the help desk. The following is a sample of a form that a support person might use to record further information.

Table 4.1.4. Document Client request

Data required:	Entry
Name of support person:	
Date and time client was contacted:	
Alternate arrangements for client while problem is being solved:	
Problem details (incl. nature and degree):	
Date and time investigation of problem commenced:	
Date and time overall system down:	
Support required for resolution of problem:	

Research required to solve problem: (Provide details.)	
Can problem be resolved by support person? (Provide details.)	
External service required? (Provide details if 'yes'.)	
Purchase of parts required? (Provide details if 'yes'.)	
Date and time parts or service person arrived:	
Date and time problem was solved:	
Date and time of commencement of recovery action/configuring:	
Date and time recovery action/configuring completed:	
Date and time of restoration of normal service:	
Details of staff involved in the investigation and resolution (include names, roles, dates of involvement):	
Name of staff who closed the incident:	

4.1.5. Resolving client's problems

Where possible, client's problems should be resolved with minimum disruption to their work.

The time taken to resolve the problem may mean that IT functions which are important to the organisation will not be able to be carried out if equipment is not

operational. In this case, some alternatives need to be considered, to allow the affected client to carry out their tasks.

Many organisations provide support remotely. Software can be installed by support staff using the organisation's network. You may need to organise a suitable time for this to happen, to minimise disruption to the client.

If warranty repairs are to be performed a staff member may have to be present to provide access to the IT equipment to be repaired. You will have to make sure that someone will be available at this time. This will avoid delays and extra charges from vendors.

If training is to be provided, you will need to organize a suitable time. This is particularly important when clients need to attend group training sessions, which involve taking them away from their normal duties for extended periods of time

4.1.6. Confirming client requirements

Confirming the client's requirements involves developing documentation to ensure you and the client have the same understanding of requirements. This documentation may be based on pre-existing documents that can be used as a template. The example below shows what such a document would look like.

Table 4.1.6. Client Requirements Confirmation

CLIENT REQUIREMENTS CONFIRMATION	
Client name:	
Project name:	
I understand your requirements as follows:	
Requirement	**Scope (if appropriate)**
Good A	To be delivered within one week of contract being signed Twelve lots of Good A required
Service A	To be provided at the time of delivery of Good A
Good B	To be compatible with your existing network

	Author: Federal TVET Agency(FTA)	IT Support Service Level 1	Date: Oct 2019
			Version: 1

Good C	Must be able to be used in outdoor locations without risk of damage
	Must be cheaper than existing provider
Our signatures on this document confirm our shared understanding of the above requirements in this project.	
Client signature:	
Service provider signature:	
Date:	

4.1.7. Obtaining approval

Obtaining approval might occur in a number of ways. It might be a verbal approval to go ahead with work based on the confirmation document. As mentioned earlier, you should *never rely on a verbal approval*. Memories of events can differ very much and lead to confusion and conflict later.

One way of obtaining approval is to have the client provide a written purchase order for the work. Alternatively, the client might write a letter outlining their agreement to your requirements document, asking you to go ahead with the work.

Any approval document that is produced should include agreement on:

- the standard of the goods or services to be provided

- the price of the goods or services to be provided

- the timelines for the project (either broken down into timelines for specific tasks or for the entire project)

- any ongoing or follow up services required or foreseen.

4.1.8. Recommending appropriate training and support

The technical support identified with the client might include areas such as:

- installation

- troubleshooting

- updating and maintenance of a system

- initial training

- provision of manuals for using and maintaining software, hardware or networks.

4.1.9. Negotiating a training and support timetable

Many IT operations need to take place when people don't need access to the system. Remember that the prime focus of the client is to keep the business running! That business will provide the funds to pay you.

This means that you need to be very flexible when arranging times for support with the client. Think of the types of training and support outlined above and what they involve. For example, consider what could happen if you have to stop access to a client's database system to update the software, or to backup the system. It could create chaos!

If you are to provide training or support you will also need to consider the priorities of the client. There are two important things to keep in mind when negotiating times to provide support:

- the need to avoid any interruption to the client's ongoing operations

- the need to have the right people from your organisation free at a time suitable for the client.

Self-Check -4	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. What does it mean documenting client request?

2. List the element in communicating clients.

Note: **Satisfactory rating - 3 points   Unsatisfactory - below 3 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = _____
Rating: _____

Name: _____   Date: _____

Operation Sheet 1	Identify client requirement

2.1.   Steps for identifying client requirements.:

The general steps to follow in identifying clients' needs are summarised below. Note: not all these steps are performed every time.

1   Preparation

2   Understand the business goals. This would include knowing if any budget is applicable or if there are there plans for future expansion.

3   Understand the organisational guidelines. Ask questions to determine what organisational guidelines are to be adhered to.

4   Define the client's requirements clearly. This will be done in conjunction with the next two steps and can involve interviewing, preparation of questionnaires or direct observation. Your questioning skills are very important at this stage and are discussed in detail in the next section.

5   Identify the roles of stakeholders — those people who have an interest in identifying the requirements. This can include end-users or customers, managers and other technical staff.

6   Identify sources of information

7   Investigation

8   Develop an understanding of the existing system

9   Investigate alternatives to the existing system

10 Document the client requirements.

Lap Test	Practical Demonstration

Name: _____   Date: _____

Time started: _____   Time finished:

_____   Time allowed 1.30 hr

Please ask your teacher for the instruction for this Lap Test

Assume you are an IT help desk professional in ABC Company and you recorded the following problems to be solved reported by your clients. Your task is to prioritize each of the problems.   Provide a reason for your answer.

3.   Request of network server failure

Priority: _____

Reason : _____

4.   Request of upgrading of software

Priority: _____

Reason : _____

5.   Request for printing problem of one user.

Priority: _____

Reason : _____

6.   Request of consultation on the upgrading of Windows XP to Windows 7

Priority: _____

Reason : _____

7.   Request for maintenance of computer

Priority: _____

Reason : _____

List of Reference Materials

Samuel P. Harbison III & Guy L. Steele Jr, **C: A Reference Manual**, Fifth Edition, Prentice Hall, 2002, http://www.CAReferenceManual.com, http://vig.prenhall.com/catalog/academic/product/0,1144,013089592X,00.html

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The development of this Learning Gide for the TVET Program Information technology support service Level I.

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