

FBLA: Help Desk – Enhanced Topic List

| Topic A: Communication |
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| Task |
| 1. Identify considerations for effective use of email communication. |
| 2. Explain techniques for cross cultural communication. |
| 3. Identify the impacts of language barriers when communicating with customers. |
| 4. Identify options used for language assistance and explain when to obtain assistance when supporting a customer whose primary language is different than your own. |
| 5. Define emotional intelligence and explain why emotional intelligence is important to the role of a CSR. |
| 6. Describe an emotional hijack and explain the impact of an emotional hijack on self and customers. |
| 7. Explain the principles and benefits of active listening. |
| 8. Define paraphrasing. |
| 9. Identify barriers of active listening. |
| 10. Describe how to match a customer's communication style and the importance of doing so. |
| 11. List the steps of the communication process. |
| 12. Explain the difference between deductive reasoning and inductive reasoning. |
| 13. Explain the difference between open-ended and closed-ending questioning. |

| Topic B: Help Desk Operations and Procedures |
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| Task |
| 1. Identify ways to promote the image of the support center. |
| 2. Define policy and list the purpose of organizational policies. |
| 3. Explain the role of the support center and list the responsibilities of the support center in meeting the needs of its customers. |
| 4. Explain the value of the support center to the organization. |
| 5. Identify common measurements used in support centers and describe how these are used. |
| 6. List the reasons for logging all incidents or service requests. |
| 7. Identify what information should be documented for incidents. |
| 8. List the benefits of documentation, such as spelling and capturing complete thoughts. |
| 9. List behaviors to avoid when documenting incidents. |
| 10. Explain creative thinking and critical thinking and why they are important for problem solving. |
| 11. Describe escalation and identify when to escalate. |
| 12. Define up-selling. |
| 13. Define cross-selling. |
| 14. Identify the benefits of up-selling and cross-selling. |

| Topic C: Customer Management |
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| Task |
| 1. Identify ways a CSR can deliver consistent, quality customer service. |
| 2. Define incident and explain the purpose of the Incident Management process. |
| 3. List and explain the value and activities of the Incident Management process. |
| 4. Describe the responsibilities of the CSR in the Incident Management process. |
| 5. Define service request and explain the purpose of the Request Fulfillment process. |
| 6. List and explain the value and activities of the Request Fulfillment process. |
| 7. Describe the responsibilities of the CSR in the Request Fulfillment process. |
| 8. List best practices for customer management during the Incident Management process. |
| 9. Explain the benefits of using the customer's name during the call. |
| 10. Identify techniques for keeping the customer's attention focused on the resolution. |
| 11. Identify habits and situations to avoid when interacting with a customer. |
| 12. List the steps for putting a customer on hold and for transferring a call. |
| 13. List the steps for closing a call. |
| 14. List the benefits of customer management. |
| 15. List strategies for establishing effective relationships with customers. |
| 16. Define customer differentiating. |
| 17. Define customer competency and describe four customer competency levels. |
| 18. Identify ways to adapt to customer competency levels and encourage and/or praise incident solving attempts by the customer. |
| 19. List principles of negotiating with a customer. |
| 20. Explain the difference between assertiveness, aggressiveness and passiveness. |
| 21. List common customer emotions or actions a representative may have to deal with. |
| 22. Explain the difference between empathy and sympathy. |
| 23. Identify signs that a conflict is developing. |
| 24. Explain why demonstrating confidence is important and list techniques for doing this over the phone. |
| 25. Identify techniques that reduce and eliminate conflict. |
| 26. Identify strategies to use when handling an irate customer. |
| 27. Identify strategies to use when handling an emotional customer. |
| 28. Identify strategies to use when handling a rambling customer. |
| 29. List steps to disengage from a customer who refuses to disengage. |
| 30. Explain the importance of keeping the customer informed of changes in status. |
| 31. List the steps for providing live status updates to customers. |
| 32. Explain the steps for leaving a voicemail status update. |
| 33. Identify the characteristics of providing consistent service. |

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| 34. Identify the characteristics of excellent customer service. |
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| Topic D: Support Center Infrastructure and Procedures |
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| 1. Identify common technologies used in the support center. |
| 2. Explain the difference between public branch exchange (PBX) and automatic call distribution (ACD) systems. |
| 3. Define computer telephony integration (CTI). |
| 4. Define procedure. |
| 5. Define quality assurance. |
| 6. Describe the types of quality assurance programs typically used in a support center. |
| 7. Identify mechanisms for call monitoring. |
| 8. Explain the importance of customer satisfaction surveys. |
| 9. Describe the three most common types of surveys and the importance of each type. |
| 10. Explain the purpose of the security management process. |
| 11. Identify types of security policies. |
| 12. List types of data that should be protected. |
| 13. Explain the importance of reporting security compromises. |

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| Topic E: Professional Career and Leadership Skills |
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| 1. Identify the characteristics of an effective leader. |
| 2. Identify ways to exhibit personal accountability. |
| 3. Describe ethical behavior in support center. |
| 4. Identify strategies for multitasking in a support environment. |
| 5. Explain how to manage the use of your time efficiently. |
| 6. List ideas for staying informed about industry trends and best practices. |
| 7. List responsibilities of a CSR. |
| 8. Explain the objectives and benefits of teamwork. |
| 9. Identify characteristics of successful teams and define responsibilities of team members. |
| 10. List techniques for establishing effective relationships with other departments. |
| 11. Define stress and identify its causes. |
| 12. List common physical symptoms of stress and list techniques for managing stress. |
| 13. Identify the characteristics of a positive service attitude. |
| 14. List the benefits of a positive service attitude. |

References:

Career Cluster Resources for Marketing, Sales & Service. 2008. National Association of State Directors of Career Technical Education Consortium. Washington, DC

Career Cluster Resources for Business, Management and Administration. 2008
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Customer Service Representative Competencies, 2011. HDI-SCA Certification Standard & Self-Study Guide. Colorado Springs, CO.