

Help Desk



FBLA High School Competitive Events Guidelines

2022–2023

Case Study Events

Overview

These events consist of a case study. In many cases, these events consist of two parts: an objective test and an interactive case study. A 60-minute objective test will be administered on-site at the NLC. Team competitors will take the test individually and team scores will be averaged. Please check specific event guidelines to determine whether or not the event has an objective test.

Eligibility

Each state may submit up to four entries. Competitors must have paid FBLA national and state dues by 11:59 p.m. Eastern Time on March 1 of the current school year.

NLC Registration

Participants must be registered for the NLC and pay the national conference registration fee to participate in competitive events.

Finals

Case study events with an objective test: The top fifteen scoring individuals/teams advance to the final round.

Case study event that do not have an objective test: Fifteen finalists, or an equal number from each group in the preliminary round, will advance to the final round.

Banking & Financial Systems
Business Management
Client Service
Entrepreneurship
Help Desk
Hospitality & Event Management
Impromptu Speaking
International Business
Introduction to Event Planning
Management Information Systems
Marketing
Network Design
Parliamentary Procedure
Sports & Entertainment Management

Help Desk

Event Type: I

Equipment Setup Time: N/A

Prep Time: 10 minutes

Performance Time: 5 minutes

Warning Time: 4 minutes

Time Up: 5 minutes

Q&A: N/A

Objective Test Competencies

- Support center infrastructure and procedures
- Customer management
- Help desk operations and procedures
- Communication
- Professional career and leadership skills

Case Overview

An interactive role-play scenario will be given based on customer service in the technical field.

Performance Guidelines—Final Round

- Two 4" x 6" note cards will be provided to each competitor and may be used during event preparation and the role play. Information may be written on both sides of the note cards. Note cards will be collected following the role play.
- No additional reference materials are allowed.
- Individuals should introduce themselves, describe the situation, make their recommendations, and summarize their cases during the role play.
- All questions raised in the case must be addressed during the role play.
- Turn off electronic devices.
- Objective test scores will be used to break a tie.
- Performances are not open to conference attendees.

Objective Test Guidelines

- No materials may be brought to the testing site.
- No calculators may be brought into the testing site; calculators will be provided.
- Electronic devices must be turned off and out of sight.
- Bring a writing instrument.

Penalty Points Deducted by Judges

- Competitors may be disqualified if they violate competitive event guidelines.
- Five points are deducted if competitors do not follow the dress code.
- Five points may be deducted for each instance of not following guidelines.

FBLA Help Desk Test Study Guide

Competency A: Communication	Minimum: 10
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.	
Competency B: Help Desk Operations and Procedures	Minimum: 20
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.	

FBLA Help Desk Test Study Guide

Competency C: Customer Management	Minimum: 30
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.	
34. Identify the characteristics of excellent customer service.	

FBLA Help Desk Test Study Guide

Competency D: Support Center Infrastructure and Procedures	Minimum: 30
Task	
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.	
Competency E: Professional Career and Leadership Skills	Minimum: 10
Task	
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

National Association of State Directors of Career Technical Education Consortium. Washington, DC

Customer Service Representative Competencies, 2011. HDI-SCA Certification Standard & Self-Study Guide. Colorado Springs, CO.

HELP DESK SAMPLE TEST QUESTIONS

- 1) Which of the following is **not** included in an incident report?
 - A) a description of the incident
 - B) a unique identification number assigned to the incident, for tracking
 - C) the birthdate of the person reporting the incident
 - D) the date and time the incident is reported

- 2) One way to promote the image of the support center is by _____.
 - A) quickly end the call
 - B) answer the call with a monotonous tone
 - C) providing customers with accurate information
 - D) provide the customer with a best guess

- 3) Motivators or drivers that cause customers to seek out specific types of products or services driven by marketing are _____.
 - A) wants
 - B) service options
 - C) needs
 - D) stimulators

- 4) Most hardware devices that malfunction today are _____.
 - A) rebuilt
 - B) repaired
 - C) replaced
 - D) not needed

- 5) The first few sentences in a support incident that introduce an agent, form the basis for the first impression of the support service by the user, and get the incident-resolution process started on a positive note is the _____.
 - A) body of the message
 - B) greeting
 - C) script
 - D) conclusion

- 6) The first step for problem solving is _____.
 - A) understanding everyone's interest
 - B) identifying the issues
 - C) documenting agreements
 - D) evaluating options

- 7) The process for reducing customer emotion in situations when frustration or anger exists is the _____ model.
- A) emotion-reducing
 - B) problem-solving
 - C) diffusing
 - D) total quality control
- 8) A feature of a Website where a writer posts messages and invites members of a user community to comment on them is a _____.
- A) network
 - B) chat room
 - C) private communication
 - D) user forum
- 9) Actively listening to an angry customer _____.
- A) distracts them from their issue
 - B) tends to eliminate conflict
 - C) makes the situation worse
 - D) increases the level of conflict
- 10) ACD stands for _____.
- A) automatic call development
 - B) alternate call distribution
 - C) automatic call distribution
 - D) alternate current distribution
- 11) A value of using monitoring programs in a call center is the ability to _____.
- A) provide defense for issues
 - B) identify poor grammar
 - C) identify areas of improvement for processes and individuals
 - D) listen to customers complaints
- 12) Customer service representatives must be prepared to deal with _____ from customers.
- A) disappointment
 - B) emotion
 - C) ALL ANSWERS ARE CORRECT
 - D) anger

- 13) A state of mental or emotional strain or tension resulting from adverse or very demanding circumstances is _____.
A) distraction
B) anger
C) confusion
D) stress
- 14) To help reduce the number of obstacles and difficulties you encounter, you should _____.
A) meditate
B) take many breaks
C) develop a positive service attitude
D) do as little as possible
- 15) Time management does **not** mean _____.
A) making a to do list
B) saying no to some obligations
C) understanding your most productive time
D) eliminating social time

- 1) C
- 2) C
- 3) C
- 4) C
- 5) B
- 6) B
- 7) A
- 8) D
- 9) B
- 10) C
- 11) C
- 12) C
- 13) D
- 14) C
- 15) D

HELP DESK SAMPLE CASE STUDY

PARTICIPANT INSTRUCTIONS

1. You have 10 minutes to review the case.
2. Presentation time is five minutes. At four minutes the timekeeper will stand and hold up a colored card indicating one minute is left and at five minutes the timekeeper will stand and hold up a colored card indicating time is up.
3. The presentation is interactive, and the judges will ask questions throughout the presentation. You are a part of an internal help desk support system team that provides on-demand 24/7/365 support to organizations that your company provides contractual IT services to on monthly or quarterly on-site visits. The judges will begin the meeting by calling into the internal help desk support system hotline (ring-ring). You will then begin your dialogue with the office assistants by asking how you can assist them.
4. You will be given two note cards. Note cards will be collected following the presentation.
5. Cover all the points described in the case.

PERFORMANCE INDICATORS

- Create positive interactions with customers.
- Identify customer's needs.
- Describe techniques to meet customer needs.
- Use basic tools and technologies in providing customer support.
- Apply critical-thinking skills to resolve incidents quickly and consistently.
- Effectively communicate strategies for working through various situations.

SAMPLE CASE STUDY SITUATION

Background Information

Your company provides full-service support to hundreds of companies in the New York City area. Clients include nonprofits, large and small corporations, small businesses, and government contractors. As a full-service provider, your company makes monthly and quarterly on-site visits and offers 24/7/365 help desk support. Your team is a part of the company's internal help desk support system.

Scenario

You received a call from a group of office assistants at one of your company's contracted clients. They are a nonprofit with about 150 employees. Each employee has multiple devices. During the monthly on-site visit, a technician completed an update to the third-party software that the organization uses. Now, over half of the employees are experiencing issues with their computers and devices running much slower, locking up, and not displaying correctly when they try to use the software. They need an immediate fix to the problem.

Other Useful Information

- Be prepared to explain a step-by-step process for rectifying the problem.
- Determine what types of questions you need to ask the client.
- The third-party software company does not provide tech support after normal business hours and on weekends.
- You are able to access the company's network remotely.

Things to Consider

You must present strategies/solutions to the client (judges) during a mock telephone conversation.

You must address the following issues in your presentation:

- The scenario and the scope involved.
- Your position and why.
- Effective solutions for meeting the customer's needs.

HIGH SCHOOL - HELP DESK

Performance Rating Sheet

Preliminary Round Final

(Mark one score per row **AND** write score in the Points Earned column. Use Tie Breaker column to add or subtract points to break ties.)

Expectation Item	Not Demonstrated		Below Expectations		Meets Expectations		Exceeds Expectations		Points Earned	Tie Breaker
	0	○	1-3	○	4-7	○	8-10	○		
Demonstrates understanding of the case study and defines problem(s) to be solved	0	○	1-3	○	4-7	○	8-10	○		
Communicates position on problem of case study	0	○	1-3	○	4-7	○	8-10	○		
Identifies logical solution and aspects of implementation	0	○	1-3	○	4-7	○	8-10	○		
Displays empathy/diplomacy when responding to case study problem	0	○	1-3	○	4-7	○	8-10	○		
Shows knowledge of terminology and components related to the case study	0	○	1-3	○	4-7	○	8-10	○		
Demonstrates conflict resolution and closure to the case study	0	○	1-7	○	8-14	○	15-20	○		

Delivery Skills

Statements are well-organized and clearly stated	0	○	1-3	○	4-7	○	8-10	○		
Demonstrates self-confidence, poise, assertiveness, and good voice projection	0	○	1-3	○	4-7	○	8-10	○		
Demonstrates ability to effectively ask and answer questions	0	○	1-3	○	4-7	○	8-10	○		
Performance Subtotal (100 max)										

Penalty Points (Mark all that apply)

Dress Code not followed	-5	○	Deduct 5 points for each instance of guidelines not being followed	-	○	Total Penalty	-	
							Grand Total	
							Objective Test Score (to be used in case of tie)	

Name: _____

School: _____

State: _____

Judge's Signature: _____

Date: _____

General Competitive Events Guidelines

The general event guidelines below are applicable to all FBLA High School national competitive events. Please review and follow these guidelines when competing at the national level. When competing at the state level, check the state guidelines since they may differ.

All members and advisers are responsible for reading and following competitive event guidelines.

Eligibility

- **Dues:** Competitors must have paid FBLA national and state dues by 11:59 p.m. Eastern Time on March 1 of the current school year.
- **NLC Registration:** Participants must be registered for the NLC and pay the national conference registration fee in order to participate in competitive events.
- **Deadlines:** The state chair, or designee, must register each state competitor on the official online entry forms by 11:59 p.m. Eastern Time on the second Tuesday in May.
- Each state may submit four entries in all events.
- Each competitor can only compete in one individual/team event and one chapter event.
- Each competitor must compete in all parts of an event for award eligibility.
- A team shall consist of two or three members. The exception is Parliamentary Procedure, which must be a team of four or five members.
- All members of a team must consist of individuals from the same chapter.
- If competitors are late for a competitive event, there are no guarantees they will get to compete. Competitive event schedules cannot be changed. **PLEASE NOTE** that competitive events start in the morning before the opening session of NLC.
- Competitors may be disqualified if they violate competitive event guidelines.
- Picture identification (drivers' license, passport, state-issued identification, or school-issued identification) is required when checking in for competitive events.

General Competitive Events Guidelines

Repeat Competitors

- **Members** may compete in an event at NLC more than once if they have not previously placed in the top ten of that event at NLC. If a member places in the top ten of an event at NLC, they are no longer eligible to compete in that event. This eliminates the exceptions for team events that were previously in place, as this change will now affect all events.
- **Modified Events:** A competitor may compete in the same event when the event is modified, regardless of placement at a National Leadership Conference. Note, if the only modification is a name change, competitors may not compete in the renamed event if they have previously placed in the top ten at the National Leadership Conference.
- **Chapter Events:** Competitors may compete in a chapter event as many times as they wish, regardless of placement at a previous National Leadership Conference (American Enterprise Project, Community Service Project, Local Chapter Annual Business Report, and Partnership with Business Project).
- **Pilot Event:** Competition in a pilot event does not disqualify a competitor from competing in the same event if it becomes an official competitive event. The participant may compete in another event as well as a pilot event.

Breaking Ties

- **Objective Tests:** Ties are broken by comparing the correct number of answers to the last 10 questions on the exam. If a tie remains, the competitor who completed the test in a shorter amount of time will place higher. If this does not break the tie, answers to the last 20 questions will be reviewed to determine the winner.
- **Objective and Production Tests:** The production test scores will be used to break a tie.
- **Objective Tests and Performances:** The objective test score will be used to break a tie based on the tie-breaking criteria of objective tests.
- **Reports/Projects and Performances:** The report/project scores will be used to break a tie.
- **Performances:** Judges must break ties and all judges' decisions are final.

General Competitive Events Guidelines

National Deadlines

- State chair/adviser must register all competitors for NLC competitive events online by 11:59 p.m. Eastern Time on the second Tuesday in May.
- All prejudged components (reports and projects) must be submitted by 11:59 p.m. Eastern Time on the second Tuesday in May.
- All prejudged projects and reports must be submitted electronically.
- All production tests must be submitted by 11:59 p.m. Eastern Time on the third Tuesday in May.
- All production tests must be uploaded online on the required platform.
- State chair/adviser may make name changes only (no additional entries) by 11:59 p.m. Eastern Time on the first Tuesday in June. Competitor drops are the only changes allowed after this date and onsite.

National Awards

- The number of competitors will determine the number of winners. The maximum number of winners for each competitive event is 10.

Americans With Disabilities Act (ADA)

- FBLA-PBL meets the criteria specified in the Americans with Disabilities Act for all participants who [submit an accommodation form](#).
- The form must be submitted by 11:59 p.m. Eastern Time on the second Tuesday in May.

Recording of Presentations

- No unauthorized audio or video recording devices will be allowed in any competitive event. Participants in the performance events should be aware the national association reserves the right to record any performance for use in study or training materials.