

Training Package	Information and Communications Technology (ICA05)		HSC Requirements and Advice
Title	Provide advice to clients		
Unit code	Unit sector	HSC Indicative Hours 30	
ICAS3031B	Support		
Unit descriptor	This unit defines the competency required to provide advice and support to clients including the communication of comprehensive technical information. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.		
Prerequisite units	There are no prerequisites for this unit.		
Employability skills	This unit contains employability skills.		

Required skills and knowledge		HSC Requirements and Advice
This section describes the skills and knowledge required for this unit.		
Required skills	Required knowledge	Key Terms and Concepts
<ul style="list-style-type: none"> • Writing macros and templates • One-to-one instruction • Client needs assessment methods • Interpretation of technical manuals • Verbal and non-verbal communication skills for conveying and clarifying complex information • Customer service skills in a range of contexts at various levels. 	<ul style="list-style-type: none"> • Operating systems supported by the organisation • Advanced features and functions of software • Information sources • Contract and service agreements with vendors • Operating systems functions and basic features • Hardware and software supported by the organisation • Features of different types of hardware • Security and network guidelines and procedures • Available in-house and vendor support. 	<ul style="list-style-type: none"> • client feedback • internal and external clients • manuals and help documentation • personal attributes • problem-solving • tracking process.

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Context of and specific resources for assessment	Method of assessment	Guidance information for assessment
<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> assessment must confirm the ability to convey comprehensive technical information to clients in a clear, concise and coherent manner. Assessment must confirm the ability to access technical manuals and help documentation and to convey this information to the client in a concise and jargon-free manner. Information conveyed enhances client efficiency. <p>To demonstrate competency in this unit the learner will require access to:</p> <ul style="list-style-type: none"> peers and supervisors for obtaining information software, hardware and networks helpdesk repository. 	<p>The breadth, depth and complexity of knowledge and skills in this competency would cover selecting, adapting and transferring skills and knowledge to new environments and providing technical advice and some leadership in resolution of specified problems. This would be applied across a range of roles in a variety of contexts with some complexity in the extent and choice of options available.</p> <p>Assessment must ensure:</p> <ul style="list-style-type: none"> performance of a defined range of skilled operations, usually within a range of broader related activities involving known routines, methods and procedures, where some discretion and judgement is required in the selection of equipment, services or contingency measures and within known time constraints would be characteristic applications may involve some responsibility for others. Participation in teams including group or team coordination may be involved. 	<p>The purpose of this unit is to define the standard of performance to be achieved in the workplace. In undertaking training and assessment activities related to this unit, consideration should be given to the implementation of appropriate diversity and accessibility practices in order to accommodate people who may have special needs. Additional guidance on these and related matters is provided in ICA05 Section 1.</p> <ul style="list-style-type: none"> Competency in this unit should be assessed using summative assessment to ensure consistency of performance in a range of contexts. This unit can be assessed either in the workplace or in a simulated environment. However, simulated activities must closely reflect the workplace to enable full demonstration of competency. Assessment will usually include observation of real or simulated work processes and procedures and/or performance in a project context as well as questioning on underpinning knowledge and skills. The questioning of team members, supervisors, subordinates, peers and clients where appropriate may provide valuable input to the assessment process. The interdependence of units for assessment purposes may vary with the particular project or scenario. 	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.</p> <p>An individual demonstrating this competency would be able to:</p> <ul style="list-style-type: none"> demonstrate some relevant theoretical knowledge apply a range of well-developed skills apply known solutions to a variety of predictable problems perform processes that require a range of well-developed skills where some discretion and judgement is required interpret available information, using discretion and judgement take responsibility for own outputs in work and learning take limited responsibility for the output of others maintain knowledge of industry products and services.

Elements	Performance criteria	Range Statement	HSC requirements and advice
1 Analyse client support issues.	1.1 Check for new problems logged by <i>client</i> .	<p>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <i>Bold italicised</i> wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.</p> <p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. 	<p>Learning experiences for the HSC must address:</p> <p><i>NB Students will be required to provide advice and support to several different clients, with varying support issues, requiring investigation and advice for a range of software, hardware and networks.</i></p> <p>An understanding of:</p> <ul style="list-style-type: none"> • the relationship between client service and business success • the concept of ‘client-focused’ company/organisation. <p>Benefits of good customer service including:</p> <ul style="list-style-type: none"> • promoting goodwill • client loyalty/repeat business • new business • increased productivity • credibility • promoting company/organisation service ethic. <p>Personal attributes that will assist employees to be responsive to client needs including:</p> <ul style="list-style-type: none"> • sincerity • confidence • enthusiasm • efficiency • empathy • interest in other people. <p>Types of clients including:</p> <ul style="list-style-type: none"> • internal <ul style="list-style-type: none"> - workmates/colleagues/employees - departments • external. <p>An understanding of the differing needs of internal and external clients.</p> <p>Paper-based and electronic means for:</p> <ul style="list-style-type: none"> • clients to record/log their requests/enquiries/problems

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			<ul style="list-style-type: none"> • information and communications technology (ICT) staff to record client requests/enquiries/problems. <p>Details to be documented by ICT staff including:</p> <ul style="list-style-type: none"> • client contact details • a description of the problem • progress of each task • actions taken (both successful and unsuccessful) to <ul style="list-style-type: none"> - answer enquiry - fulfil request - solve the problem • identify status (such as urgent, pending, completed).
	<p>1.2 Check previous logs for similar problems or requests from <i>client</i>.</p>	<p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. 	<p>Learning experiences for the HSC must address:</p> <p>A knowledge of company/organisation/industry practices for:</p> <ul style="list-style-type: none"> • naming standards • version control • tracking process • audit trails. <p>An understanding of:</p> <ul style="list-style-type: none"> • the purpose of background knowledge of client requirements • the need for a record keeping system of requests/problems.
	<p>1.3 Investigate and document the support issues affecting the <i>client</i>.</p>		<p>Learning experiences for the HSC must address:</p> <p>Skills required including:</p> <ul style="list-style-type: none"> • research and analysis • problem-solving • report writing. <p>Acknowledgement that in order to design a solution to a client's problem you have to understand their need.</p> <p>Client needs analysis/assessment to enable:</p>

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			<ul style="list-style-type: none"> • a clear understanding of the client request/ problem • an evaluation of client requirements • the prioritisation of requirements as essential or optional. <p>Methods to investigate the support issue including:</p> <ul style="list-style-type: none"> • interview the client using open, closed and reflective questions combined with active listening • on-site observation/examination • questionnaire • focus group • contacting vendor/maintenance organisation • existing documentation. <p>An awareness of constraints that apply to provision of advice/support including:</p> <ul style="list-style-type: none"> • cost • time available • business policies and practices • staff skills and training requirements • room or building geometry. <p>Sources of information and possible solutions including:</p> <ul style="list-style-type: none"> • colleagues • company/organisation policies and manuals • consultants • suppliers • personal/professional contacts • ICT industry publications • trade shows • the internet • technical manuals • help documentation. <p>Company/organisation/industry standards for workplace documentation including:</p> <ul style="list-style-type: none"> • format • style • language <ul style="list-style-type: none"> - clear - concise

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			<ul style="list-style-type: none"> - directive - purposeful - correct - culturally sensitive - jargon-free • details required.
	<p>1.4 Notify <i>client</i> of the results of <i>investigation</i> and provide <i>advice and support</i> on findings.</p>	<p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. <p><i>Investigation</i> may include:</p> <ul style="list-style-type: none"> • on-site examination • questions and answers • active listening to clients and colleagues • contacting vendor or maintenance organisations • reviewing technical advice about the organisation. <p><i>Advice and support</i> may include:</p> <ul style="list-style-type: none"> • provision of client documentation • manuals • one-to-one training • identification of training need for referral to supervisor • documentation from vendor • advice on software supported by the organisation, including but not limited to use of macros, statistical functions of spreadsheets, creation of templates, generation of a complex report on a database, password and log-on procedure • advice on hardware supported by the organisation, including but not limited to printers, laptops, notebooks, CD-ROM, screens, disk drives, reconfiguration of settings, operation of scanners. 	<p>Learning experiences for the HSC must address:</p> <p>Establishing good customer service including:</p> <ul style="list-style-type: none"> • knowledge of company/organisation product/service policies • use language that is targeted to the specific customer • present a friendly and courteous manner • use positive gestures and body language • ensure prompt response to enquiry/request • adopt a solutions-oriented approach • follow-up to maximise customer satisfaction. <p>Interaction with the client to:</p> <ul style="list-style-type: none"> • provide an overview of task, finding(s) and recommendation(s) • enable discussion of feasible alternative(s) • decide on best solution to enhance client efficiency • arrange implementation of course of action. <p>Verbal and non-verbal communication skills to convey comprehensive technical information to client in a clear, coherent, concise and jargon-free manner.</p> <p>A range of possible advice and support including:</p> <ul style="list-style-type: none"> • provision of user documentation/manuals to assist client • one-to-one instruction/training • referral of training need to client's supervisor/team leader • documentation from vendor • advice on hardware and software supported by the company/ organisation.

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	1.5 Obtain <i>client</i> feedback and make changes.	<p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. 	<p>Learning experiences for the HSC must address:</p> <p>An awareness of the importance of ICT staff and the client agreeing on what is to be done in regard to the request/problem.</p>
2 Provide advice on software, hardware or network.	2.1 Confirm software, hardware or network requirements with <i>client</i> .	<p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. 	<p>Learning experiences for the HSC must address:</p> <p>A knowledge of the following supported by the client's company/organisation:</p> <ul style="list-style-type: none"> • basic features and functions of the operating system • features of the different types of hardware • advanced features and functions of the software • contract and service agreements with vendors • security and network guidelines and procedures.
	2.2 Investigate and document a <i>solution</i> .	<p><i>Solution</i> may include but is not limited to</p> <ul style="list-style-type: none"> • new hardware • hardware upgrades • new software • software upgrades • user training • implementing a new system. 	<p>Learning experiences for the HSC must address:</p> <p>Benefits and limitations of a range of solutions including:</p> <ul style="list-style-type: none"> • hardware <ul style="list-style-type: none"> - upgrades - new • software <ul style="list-style-type: none"> - upgrades - new • user training • implementing a new system. <p>Application of known solutions to a range of predictable problems.</p> <p>A knowledge of the process for developing macros and templates:</p> <ul style="list-style-type: none"> • analyse client requirements • design solutions • discuss solutions with the client and choose a solution • create and test solution • demonstrate solution to client • refine the solution • document the solution.

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			Writing a range of macros and templates.
	2.3 Document additional requirements discovered in the investigation and refer them to the <i>client</i> .	<p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. 	
	2.4 Obtain approval from the <i>client</i> to implement the <i>solution</i> .	<p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. <p><i>Solution</i> may include but is not limited to</p> <ul style="list-style-type: none"> • new hardware • hardware upgrades • new software • software upgrades • user training • implementing a new system. 	<p>Learning experiences for the HSC must address:</p> <p>An awareness of the purpose for obtaining approval including:</p> <ul style="list-style-type: none"> • client verification of their requirements • to ensure <ul style="list-style-type: none"> - solution is within company/organisation policy - costing of the solution is understood and allocated - timeframes for implementation of solution are acceptable. <p>A knowledge of company/organisation approval policies and procedures including:</p> <ul style="list-style-type: none"> • services that can be provided on verbal approval from client • services that require written/signed approval <ul style="list-style-type: none"> - workplace documentation to be completed - authorised person(s) for signature.
	2.5 Investigate and document the amount of technical support the <i>client</i> may require.	<p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. 	<p>Learning experiences for the HSC must address:</p> <p>Factors influencing the amount of technical support required including:</p> <ul style="list-style-type: none"> • skill level of client • complexity of solution being implemented. <p>A knowledge of the company/organisation's:</p> <ul style="list-style-type: none"> • contract and service agreement with vendors • available support <ul style="list-style-type: none"> - in-house - vendor - third party.

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	2.6 Discuss and agree the level of technical support identified with the <i>client</i> .	<p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. 	
	2.7 Arrange a time with the <i>client</i> when support will take place.		<p>Learning experiences for the HSC must address:</p> <p>An awareness of the importance of:</p> <ul style="list-style-type: none"> • implementing solutions within acceptable timeframes • minimising impact on client's daily responsibilities.
	2.8 Provide technical support as part of group or one-to-one instruction to the <i>client</i> .		<p>Learning experiences for the HSC must address:</p> <p>Benefits and limitations of:</p> <ul style="list-style-type: none"> • one-on-one instruction • team/group training.
	2.9 Provide manuals and help <i>documentation</i> to the <i>client</i> .	<p><i>Documentation</i> may include:</p> <ul style="list-style-type: none"> • a collection of records that describe the structure, purpose, operation, maintenance and data requirements for a computer program, operating system or hardware device. <p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. 	
3 Obtain client feedback.	3.1 Create an appropriate evaluation or feedback form or other mechanism to gather feedback about the <i>solution</i> and support provided.	<p><i>Solution</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • new hardware • hardware upgrades • new software • software upgrades • user training • implementing a new system. 	<p>Learning experiences for the HSC must address:</p> <p>Recognition of the value of client feedback to the company/organisation including:</p> <ul style="list-style-type: none"> • improving business relationships • identifying and overcoming existing problems • eliminating entrenched work practices • improving productivity • enhancing output quality • future development of the company/organisation. <p>A range of methods to obtain client feedback including:</p> <ul style="list-style-type: none"> • questionnaire <ul style="list-style-type: none"> - paper

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			<ul style="list-style-type: none"> - electronic • interview • focus group. <p>Points to consider when designing feedback mechanism including:</p> <ul style="list-style-type: none"> • use of language <ul style="list-style-type: none"> - targeted to client - plain English - minimising technical/industry jargon • questioning technique <ul style="list-style-type: none"> - open, closed and/or reflective - avoiding bias/leading questions • opportunity for 'free-response'. 	
	3.2 Provide <i>client</i> with instructions on how to complete the form or use other means of providing feedback.	<p><i>Client</i> may include but is not limited to:</p> <ul style="list-style-type: none"> • internal departments • external organisations • individual people • employees. 	<p>Learning experiences for the HSC must address:</p> <p>A range of methods to distribute/enable feedback/evaluation mechanism to the client:</p> <ul style="list-style-type: none"> • written <ul style="list-style-type: none"> - mail - electronic mail - internet/intranet - facsimile • verbal <ul style="list-style-type: none"> - telephone - one-on-one - meeting. 	
	3.3 Distribute the evaluation or feedback to the <i>client</i> .		<p>Learning experiences for the HSC must address:</p> <p>Types of feedback including:</p> <ul style="list-style-type: none"> • positive • negative • constructive. <p>How to interpret feedback in order to improve work practices.</p> <p>Reporting feedback to appropriate person(s) including:</p> <ul style="list-style-type: none"> • supervisor/team leader • management 	
	3.4 Review the feedback from the <i>client</i> to identify areas for improvement.			

Elements	Performance criteria	Range Statement	HSC requirements and advice
			<ul style="list-style-type: none"> • vendor • supplier • trainer • colleagues.