2023-24 Competitive Events Guidelines
Help Desk

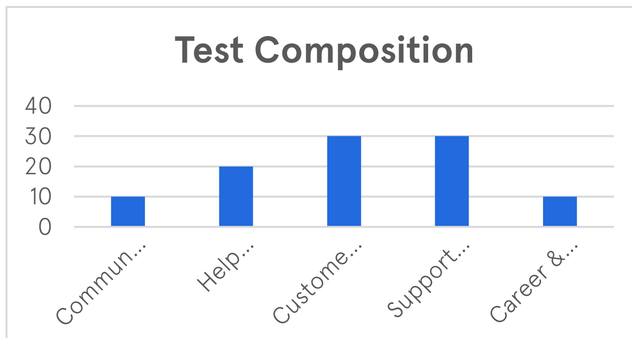
Help Desk provides members with the opportunity to demonstrate knowledge around competencies in help desk operations. This competitive event consists of an objective test and a role-play scenario. It aims to inspire members to learn about the skills in the general operations of the various components of the help desk sector.

Event Overview
Event Type: Individual
Event Category: Role-Play
Event Elements: Objective Test and Role Play
Objective Test Time: *50 minutes*
Role Play Time: *10-minute preparation time, 5-minute presentation time*
NACE Connections: Career & Self-Development, Communication, Leadership, Professionalism

Equipment Provided by Competitors: Pencil for objective test
Equipment Provided by FBLA: One piece of scratch paper per competitor for objective test; Two notecards and pencils for each competitor and secret problem/scenario for role play

Objective Test & Role Play Competencies

- Communication
- Help Desk Operations and Procedures
- Customer Management
- Support Center Infrastructure and Procedures
- Professional Career and Leadership Skills



District/Region/Section
Check with your District/Region/Section leadership for District/Region/Section-specific competition information.

State
Check with your State Leader for state-specific competition information.

National
Policy and Procedures Manual
- Competitors should be familiar with the Competitive Events Policy & Procedures Manual, found on the Competitive Events page on www.fbla.org.

Eligibility
- FBLA membership dues are paid by 11:59 pm Eastern Time on March 1 of the current program year.

- Members may compete in an event at the National Leadership Conference (NLC) more than once if they have not previously placed in the top 10 of that event at the NLC. If a member places in the top 10 of an event at the NLC, they are no longer eligible to compete in that event.
- Members must be registered for the NLC and pay the national conference registration fee in order to participate in competitive events.
- Members must stay in an official FBLA hotel to be eligible to compete.
- Each state may submit four entries per event.
- Each member can only compete in one individual/team event and one chapter event (American Enterprise Project, Community Service Project, Local Chapter Annual Business Report, Partnership with Business Project).
- Each competitor must compete in all parts of an event for award eligibility.
- Picture identification (physical or digital driver's license, passport, state-issued identification, or school-issued identification) is required when checking in for competitive events.
- If competitors are late for an objective test or presentation time, they will be allowed to compete until such time that results are finalized, or the accommodation would impact the fairness and integrity of the event. Competitive event schedules cannot be changed. Competitive events start in the morning before the Opening Session of the NLC.

Recognition

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

Event Administration

- This event is two rounds: objective test and role-play
- Objective Test
    - **Objective Test Time:** 50 minutes
    - **Objective Test Questions:** 100 questions
    - This event is an objective test administered online at the NLC.
    - No reference or study materials may be brought to the testing site.
    - All electronic devices such as cell phones and smart watches must be turned off before competition begins.
- Interactive Role Play Presentation
    - **Preparation Time:** 10 minutes
    - **Presentation Time:** 5 minutes (one-minute warning)
    - **Question & Answer:** None
    - The top 15 scoring individuals will advance to the role-play final round.
    - The role play will be a problem or scenario in customer service in the technical field. The role play will be given to the competitors at the beginning of their assigned preparation time.
    - Two notecards will be provided to each competitor and may be used during event preparation and role play presentation. Information may be written on both sides of the notecards. Notecards will be collected following the role play.

  - No additional reference materials or props or visuals are allowed.
  - Role plays are interactive presentations; the judges may ask questions throughout the presentation.
  - Role play presentations are not open to conference attendees.
  - Competition ethics demand that competitors do not discuss or reveal the role play until the event has ended.

Scoring

- The top 15 scoring individuals will advance to the final round. Ties are broken by comparing the correct number of answers to 10 pre-determined questions on the test. If a tie remains, answers to 20 pre-determined questions on the test will be reviewed to determine the winner. If a tie remains, the competitor who completed the test in a shorter amount of time will place higher.
- The role play round scores only will be used to determine winners.
- Objective test scores will be used to break a tie in the final round.

Recording of Presentations

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

Americans with Disabilities Act (ADA)

- FBLA meets the criteria specified in the Americans with Disabilities Act for all competitors with accommodations submitted through the conference registration system by the registration deadline.

Penalty Points

- Competitors may be disqualified if they violate the Competitive Event Guidelines or the Honor Code.
- Five points are deducted if competitors do not follow the Dress Code or are late for their assigned testing or presentation/role-play time.

Electronic Devices

- All electronic devices such as cell phones and smart watches must be turned off.

Study Guide: Competencies and Tasks

A. Communication
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.

B. Help Desk Operations and Procedures
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.

C. Customer Management
1. Identify ways a CSR can deliver consistent, quality customer service.
2. Define incidents 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 requests 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 and describe four customer levels.
18. Identify ways to adapt to customer 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.

D. Support Center Infrastructure and Procedures

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.

E. Professional Career and Leadership Skills

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.

Help Desk Role Play Presentation Rating Sheet

Expectation Item	Not Demonstrated	Below Expectations	Meets Expectations	Exceeds Expectations	Points Earned
Demonstrates understanding of the role play and defines problem(s) to be solved	*No description or role play synopsis provided; no problems defined*	*Describes and provides role play synopsis OR defines the problem(s)*	*Describes and provides role play synopsis AND defines the problem(s)*	*Demonstrates expertise of role play synopsis AND definition of the problem(s)*	
	0 points	1-6 points	7-8 points	9-10 points	
Communicates position on role play scenario	*No position communicated*	*Communicates position not related to problem*	*Communicates position on problem*	*Communicates in a professional manner position on problem in scenario*	
	0 points	1-6 points	7-8 points	9-10 points	
Identifies logical solution and aspects of implementation	*No solution identified*	*Solution provided, but implementation plan not developed*	*Logical solution and implementation plan provided and developed*	*Feasible solution and implementation plan developed, and necessary resources identified*	
	0 points	1-6 points	7-8 points	9-10 points	
Displays empathy/diplomacy when responding to role play scenario	*No empathy or diplomacy displayed*	*Empathy or diplomacy displayed in response to role play scenario*	*Empathy and diplomacy displayed in response to role play scenario*	*Display of empathy and diplomacy skills add to resolution of role play scenario*	
	0 points	1-6 points	7-8 points	9-10 points	
Shows knowledge of terminology and components related to the role play	*No understanding of the role play demonstrated*	*Terminology is presented but not expanded on*	*Clear understanding of terminology and implementation into presentation*	*Terminology is communicated clear enough for client (judge) to proceed on their own*	
	0 points	1-6 points	7-8 points	9-10 points	
Demonstrates conflict resolution and closure to the role play	*No closure was provided*	*Situation was closed OR conflict was resolved*	*Conflict was resolved, the situation has closure*	*Conflict was resolved, the situation has closure, and client (judge) is satisfied*	
	0 points	1-9 points	10-16 points	17-20 points	
Presentation Delivery					
Statements are well-organized and clearly stated	*Competitor did not appear prepared*	*Competitor was prepared, but flow was not logical*	*Presentation flowed in logical sequence*	*Presentation flowed in a logical sequence; statements were well organized*	
	0 points	1-6 points	7-8 points	9-10 points	
Demonstrates self-confidence, poise, assertiveness, and good voice projection	*Competitor did not demonstrate self-confidence*	*Competitor demonstrated self-confidence and poise*	*Competitor demonstrated self-confidence, poise, and good voice projection*	*Competitor demonstrated self-confidence, poise, good voice projection, and assertiveness*	
	0 points	1-6 points	7-8 points	9-10 points	
Demonstrates the ability to effectively answer questions	*Unable to answer questions*	*Does not completely answer questions*	*Completely answers questions*	*Interacted with the judges in the process of completely answering questions*	
	0 points	1-6 points	7-8 points	9-10 points	
Staff Only: Penalty Points (5 points for dress code penalty and/or 5 points for late arrival penalty)					
Presentation Total (100 points)					

Name(s):		
School:		
Judge Signature:		Date:

Comments: