

SAMPLE CASE STUDY—HELP DESK

PARTICIPANT INSTRUCTIONS

1. You have 10 minutes to review the case.
2. Presentation time is five minutes. At four minutes the timekeeper will hold up a colored card indicating you have one minute left and at five minutes the timekeeper will hold up a card indicating time is up.
3. The presentation is interactive with the judges who will ask questions throughout the presentations. One judge will play the role of Amanda who is a customer. You will play the role of a help desk manager for Utmost Support, Inc.
4. You will be given two note cards to use.
5. Cover all the points described in the case and be prepared to answer questions.
6. The presentation is interactive with the judges who will ask questions throughout the presentation.

PERFORMANCE INDICATORS

- Communications skills—the ability to exchange information and ideas with others through writing, speaking, reading, or listening
- Analytical skills—the ability to derive facts from data, findings from facts, conclusions from findings, and recommendations from conclusions
- Production skills—the ability to take a concept from an idea and make it real
- Priorities/time management—the ability to determine priorities and manage time commitments

CASE STUDY SITUATION

Background

You are the help desk manager for Big Bank. Big Bank is a national bank with a centralized IT Department. If individual banks have technical support needs, they call your department directly.

Situation

Suzanne, who is a loan officer, is sitting with her supervisors. They are having an ongoing issue with their loan data input. They have entered all loan information for the current applicant three times, saved it, and then went to review it and found nothing to be there.

On the back end at the technical support department, you are not showing that anything has been submitted. You will need to explore what is happening with the team at the local branch to figure out why their system is not talking to headquarters.

Tasks

You have received Suzanne's phone call and must decide what to do next.

Suzanne is already frustrated, upset, and is short on time when she calls and is in need of immediate assistance. You need to calm her down – and help her take care of the customers in front of her.