Chapter 10: Employee Training and Development Worksheet

This Help Desk improvement checklist worksheet is intended to be used in conjunction with the related chapter in the [Help Desk Management Book by Wayne Schlicht](#).

This employee training worksheet is focused on creating an effective training structure template. This training template will be generic, and you can use it to develop the training for any topic your staff needs. However, we will give you our suggestions and recommendations for training topics to get you started.

Step 1 – Identify the major training areas needed at your Help Desk.

These are top-level training programs. Our suggestions are below.

<u>**Top-level training programs**</u>
Ticketing application
Incident management
Monitoring and event management
Phone system
Social Media and chat support
Knowledgebase
Problem management
Change management

Step 2 – Break down the top-level training programs into smaller-sized training modules.

By creating smaller training modules, they will be right-sized and focused on the experience level of the trainee. An example of the ticketing application training program breakdown is below. *Remember, this is done for every top-level training program identified.*

Top-level training program: Ticketing application
Training module 1: A training module focused on the basic ticketing application functions for a Help Desk agent.
Training module 2: A training module focused on the advanced ticketing application functions for a Help Desk agent.
Training module 3: A training module focused on creating and publishing reports from the ticketing application.
Training module 4: A training module focused on the ticketing application functions for a Help Desk team lead and manager role.
Training module 5: A training module focused on administering the ticketing application functions for a Help Desk administrator or specialist.

Step 3 – Develop learning objectives for each of the training modules.

These are the specific objective you want the trainee to understand after completing the training. Below is an example using the ticketing application. *Remember, this is done for every training module identified.*

Top-level training program: Ticketing application
Training module 1: A training module focused on the basic ticketing application functions for a Help Desk agent.
Training objective 1: Objective 1 is focused on creating and documenting an incident support ticket.
Training objective 2: Objective 2 is focused on the proper use of the ticket classification process.
Training objective 3: Objective 3 is focused on using the knowledge base, decision trees, and ticket matching to resolve tickets.
Training objective 4: Objective 4 is focused on escalating a ticket and understanding which resolver groups to use.
Training objective 5: Objective 5 is focused on how to provide ticket status updates to the customer.
Training objective 6: Objective 6 is focused on how to handle a request for service.

Step 4 – Develop the training content for each training module.

This is where you put meat on the bones. Make sure the training content is specific for each training objective. You can always add another training objective if needed. We have assembled some tips for developing the training content.

Hands-on – Make sure the training content uses hands-on exercises to reinforce the training.

Trainee participation – Make sure the training content facilitates a discussion between the trainer and trainees.

Handouts – Make sure the trainees receive handouts and other materials they can review during and after the training session.

Computer-based content – Provide videos or computer-based content and make sure the trainees can review the content as much as they want.

Step 5 – Determine who needs training.

In step 2, we had several training modules in our example. A relatively new Help Desk agent would need the training module for the basic ticketing application functions of an agent. However, they would not need the training module for the ticketing application administration. We recommend creating a training program for every employee.