



BlueRibbon Boot Camp Coursework

INTRODUCTION

About BlueRibbon Boot Camp

Welcome to BlueRibbon Boot Camp. The material that you are about to study will prepare you for the BlueRibbon Boot Camp Exam, and is the first step in getting Boot Camp Certified. It is designed to be a refresher course that identifies basic industry knowledge and reinforces the soft skills of preparation and punctuality.

It can be a bit trite, and even a bit basic and obvious at times, but it's been proven as a great starting point for newbies, a good refresher for the seasoned veteran, and ensures that all BlueRibbon start from a solid foundation of providing quality service.

Once you are finished reviewing this course material, the next step will be to take the Boot Camp Exam. This can be done by clicking the "Get Certified" button in your BlueRibbon profile. Good luck!

CHAPTER 1: KNOW THE LINGO

This is a list of all the common industry jargon, buzzwords, and acronyms.

OEM *Original Equipment Manufacturer*: refers to companies like IBM, Dell, and HP that manufacture hardware for resale.

SLA *Service Level Agreement*: an SLA generally refers to contracts put in place between a service provider and the end user of hardware, covering repair and replacement terms in the event of equipment failure. *These are used to drive technician performance and ensure that the client meets the company's expectations.*

IMAC *Installs, Moves, Adds, and Changes*: refers to field service events that are generally "scheduled", unlike break/fix events that happen without notice.

ISO *Independent Service Organization*: ISO generally refers to smaller field service organizations that have a handful of their own technicians and/or utilize a network of independent technicians to deliver service to their clients.

POS *Point of Sale*: in the context of field service, refers to equipment placed where sales are transacted in a commercial establishment (retail, fast food, banks, etc.)

IVR *Interactive Voice Response*: phone systems used by many dispatch systems to accept work, report status of work, report timestamps, etc.

Tech Lingo Recap

OEMs are large companies that manufacture equipment hardware. OEMs need field technicians to maintain that hardware. When this is scheduled, it is abbreviated as an IMAC (Installs, Moves, Adds, Changes). An unscheduled repair is known as a Break/Fix. In order to ensure that the field technician delivers quality work, the client and the end user have a Service Level Agreement.

CHAPTER 2: KNOW YOUR CLIENT

Here are several types of clients you'll have as a field technician.

Full time employees work for one company. The company trains them, they get shirts with nametags, often drive a company vehicle with logos all over it, and the company pays them each week. As an independent technician, things are not as clean and it can get confusing.

It's important that you understand the client types that will be seeking your services. It's also important to know whom you are working for each time you show up at a site for an event. You will be receiving payments from several different clients, and the pay will be approved only if you do the work to satisfaction, including representing your client properly and professionally on site.

- CLIENT TYPES -

1. Original Equipment Manufacturer

OEM stands for *Original Equipment Manufacturer*. Examples of OEMs are IBM, Dell, HP, etc. An OEM usually has a service division that handles all of the IMAC (scheduled) and break/fix (unscheduled) business. The service division is often a separate profit center for the OEM with their own sales team. As such, the sales team usually bids on any service contracts they can, even if it's to service their competitor's equipment. For instance, Fujitsu and NCR are direct business competitors. NCR may have sold the POS equipment to a large retailer, but Fujitsu may have won the service contract for that same equipment. When working for an OEM, be sure you know who is paying your bill and be sure to represent them on site, and not necessarily the actual OEM of the equipment. *However, ultimately, you should always check the work order for instructions regarding whom you should represent on any given field event.*

2. National Service Provider

An example of a national service provider might be Unisys or DecisionOne. Often times, these companies are providing service to the large OEMs. As you understand the business more, you'll see that there are often several layers, or "middle men", in the chain. It may not be apparent, but there are always reasons for, and value provided by, each link in the chain. Be sure that you are loyal to the client that is paying your bill. Attempts to circumvent your client to cut out one of the links in the chain is a quick way to get a bad name in the business, and thus, a good way to put yourself out of work.

3. Web-Based Facilitator/Consolidator

This is probably the best opportunity for you as you begin looking for opportunities to jumpstart your career. You register with these companies as an independent technician, and work contracts are between you and the web-based consolidator. The consolidator brings you opportunities from their clients, who could be any of the other types listed here (i.e., OEMs, National Service Providers, ISOs, or Consumers). There are generally no interviews, and you can bid on work orders posted on the site immediately.

4. Independent Service Organization

An ISO, in the context of our discussion, refers to an "Independent Service Organization". An ISO generally services large OEMs and/or national service providers at a local or regional level. For instance, IBM may have several ISOs around the country that they use to provide services regionally. Simply put, the ISO is a subcontractor to the OEM. Because ISOs are generally small and have lean overhead budgets, they use independent technicians to provide the services to their clients.

It's at the ISO level that the most "conflict" occurs between technicians and the companies that contract them. Frequently, an ISO contracts an independent technician to perform services for their client (a large OEM, for example). The independent technician sees an opportunity to do business directly with the OEM, cutting the ISO out of the chain. The independent tech starts getting more business than he/she can handle from the OEM and another ISO is born. Of course, this scenario has all sorts of ethical business practice implications, as is covered elsewhere in this section of the course. The way in which you handle these situations and opportunities will greatly dictate the reputation you get in this industry. It's always best to err on the side of full disclosure. For example, if an ISO's OEM client solicits your services directly, you should discuss it with the ISO that contracted you before doing business directly with the ISO's client.

5. End Business/Retailer

As an independent technician, you may happen across end user clients that will go directly to you for services. This is particularly common with small, local businesses that need help setting up their IT networks. It's important to note that there will be opportunities to do business directly with end users when you are introduced to them indirectly through your OEM, National Service Provider, ISO, and Web Based Consolidator clients. As we have pointed out in several places in this course, you must resist these opportunities unless you disclose it with your client and get their approval.

The best way to get black listed in this industry is to go around your clients, cutting them out of the "supply chain". They provide value as a sales agent for you to get more work opportunities. There is a cost to "sales", and if you cut the hand that feeds you, it's the beginning of the end for you as an independent contractor

6. Consumer

The consumer services market is becoming more competitive as consumers get savvy to web based services like Angieslist.com and Craigslist.com. Even retailers like Best Buy, using the Geek Squad to service their consumer product warranties, may find it necessary to cut costs by adopting an independent tech model to deliver on-site services to their consumer customers.

CHAPTER 3: IMAC vs. Break/Fix

Scheduled vs. Non-Scheduled Repairs

All of your field service events will fall under one of two general categories: IMAC or Break/Fix. Generally speaking, IMAC (Installs, Moves, Adds, and Changes) are scheduled events. They are activities that the client anticipates and schedules to be performed on a specific date. Here are some more specific definitions and examples of IMAC events.

- IMAC

Installations

This usually refers to installations as part of a large project/rollout. For example, a major retailer who needs to replace all of its POS devices at each branch/site location would schedule each site for installation on a specific date, and then coordinate shipping of the equipment with the service provider.

Moves

For example, imagine that an agent for a major insurance firm is moving his home office. The service provider would schedule a date for a technician to move the equipment from one office to the other.

Adds

For example, an Add could take place if a new employee is hired at a large office complex, and there is a need to run a data cable to new desktop equipment in a new office or cubicle.

Changes

This IMAC category is a "catch all" for the other field service events. Installations, Moves, and Adds could all be considered "Changes".

- BREAK/FIX -

Unlike IMAC work that usually happens when new equipment is being introduced or moved, break/fix work is required when equipment "breaks" and needs to be "fixed". Service companies that engage in break/fix work generally have 2-5 year contracts with their clients that require them to repair or replace equipment as it fails. There are several services that are provided

under a break/fix agreement, all of which are usually subject to response times defined in the SLA (Service Level Agreement).

For example: the service company may have a depot repair facility where the end user ships the broken part or unit and the service company repairs it. The end user doesn't wait for the part to be fixed—the service company sends a part previously repaired (or a new part) from their inventory. When the shipped broken part is repaired, it goes into inventory to be used for the next time a user needs the same part replaced. The service company will likely have thousands and thousands of units in the field as part of the SLA, so they just continue this repair & ship cycle for the duration of the contract.

When a new or repaired part is shipped into the field for the end user, that's when you would be dispatched to meet the part on site or pick it up at a depot and bring to the site with you for installation. You will generally have a specified amount of time to get yourself and the part on site and installed.

Many SLAs require a 4-hour response in order to be compliant with their contract. *If the service provider misses their SLA times too often, they will pay stiff penalties.*

You should never accept work that you cannot perform, whether it's IMAC or break/fix. However, due to the penalties usually attached to break/fix work under the SLA, it is critical that you don't accept any break/fix jobs for which you cannot meet the SLA requirement.

The worst thing a technician can do for any service event is to not show up. There are usually several people, parts, and equipment coordinated for every field service event. A technician "no show" has high visibility and escalates quickly. If a client reports a technician "no show" to BLUERIBBON, the technician's BLUERIBBON certification(s) will be in jeopardy and could be revoked. Don't let this happen to you. Everyone understands that "stuff happens." If you are professional and make as many calls as required to do damage control, you will remain in good standing with your client and BLUERIBBON.

-BREAK REQUIREMENTS-

In order to effectively run break/fix service calls with SLA requirements, there are several things you must have:

- A cell phone or PDA that accepts SMS
- A thorough understanding of Interactive Voice Response (IVR) systems
- A thorough understanding of service dispatch systems
- Availability to respond quickly to client dispatches (whether or not you can run them, you must be able to respond quickly so that your client can find another technician if you are unavailable)
- Reliable transportation
- Troubleshooting skills/experience
- The appropriate tool set for the technology

CHAPTER 4: BUDDY NETWORKS—THERE WHEN YOU NEED THEM

Leverage your connections for advice and coverage

Program Coming Soon!

Here's a scenario everyone can relate to: you're running late for an important job and then things go from bad to worse. You know you won't be able to make it, and now you're faced with a lose-lose decision: Do you take the strike on your record, but save yourself from confronting your client? Or do you call, mention something about car troubles or family emergencies (equal favorites in the industry), and try to mitigate the risk of being accosted for failing to show up?

A Buddy Network is a third, much less painful choice.

Your **Buddy Network** is a *network of knowledgeable friends in your industry*. So you can't make it? It happens.

1. *Call your client contact as soon as you know you can't make it and let them know you will help find an equally qualified replacement.*
2. *Use your Buddy Network to help find an equally qualified, BLUERIBBON Boot Camp Certified replacement.*
3. *When you find someone available, make the introductions between your buddy and your client.*

- Now, you've managed client expectations.
- The job can still be completed on time.
- You've just enabled a buddy with a job opportunity.

It is a win-win for everyone

The Blue Ribbon Tech Buddy Network

Why you should use your Buddy Network:

These are the guys from the route room; knowledgeable colleagues of the industry, your first line of reference for technical advice, and *most importantly*, the guys who may cover for you if you are running late or can't make it to a site. This network provides you with a go-to tech support system, a social network within your industry, a list of qualified substitutes for last-minute emergencies, and a rolodex of professionals who may provide you with referrals for future work.

Why Blue Ribbon Technicians may want to connect with you:

Your experience, skills, and last-minute availability are valuable. Your peers will appreciate being able to contact you for advice before or during an on-site repair.

How to use the Buddy Network:

Nearby field techs will soon show up in your tech profile, and just like a Facebook friend request, you can request to connect with them directly and share contact information. Always remember to maintain your professional code of conduct. If you need to contact your buddies on site, do so from a quiet, private location. **Never discuss payments with buddies in your network, at any time, for any reason. Never send a buddy onsite directly. Make the introductions with the client and let them discuss your buddy's engagement.**

It is *highly recommended* that you connect with buddies in your network. The value of this personal referral network will grow exponentially as you invite and connect with like-minded colleagues. Your Buddy Network can be as large as you want. In fact, the larger your Buddy Network is the better. Having a larger network will allow you to source more work to fellow technicians in your area, which, in turn, attracts more clients and more work to your area. Please note that technicians must be BLUERIBBON Boot Camp Certified in order to be in your network, and must meet the required technical qualifications of any particular field event if they are to cover for you.

Buddy Network Recap ◉ ◉ ◉

Your Buddy Network is a direct link to other professionals who are Blue Ribbon Tech Boot Camp Certified.

This network is a valuable resource for technical advice and, most importantly, last-minute coverage if you can't make a field service event. It's also a way for you to share tips, tricks, advice, and work referrals, creating a valuable social component to your network.

CHAPTER 5: WORK PROTOCOLS

It's show time!

Pre-Install Protocol: Show up on time and prepared.

A little preparation goes a long way. When you show up on time and familiar with the company (your client's customer), your professionalism will be unquestioned. Instead of writing notes about the company on your work order, commit them to memory. If you forget, be sure to call your contact from your car to answer any questions. In addition, make sure you know whom you are representing when you get onsite. To be sure of this, you should always check the work order beforehand for specific instructions regarding representation. Commit this to memory as well, rather than writing notes on the work order.

Before you accept a job:

- Ensure you will be able to complete the entire engagement.
- Ensure you are qualified. If you accept a job that you do not have the appropriate technical skills for, it can affect the SLA, your reputation, and you could be disqualified from other work from that client.
- Ensure you are comfortable with the role. If you accept a job at a lower level than usual, be sure you are comfortable with someone else taking the lead.

Before you leave for the job:

- Review the provided installation manual, deployment scripts, and protocol documents privately and well enough before the job to complete all pre-install requirements. Some jobs require pre-install calls, videos, etc. Don't wait until the last minute to check your instructions.
- Know your on-site point of contact and notify them when you are enroute.
- Review the driving directions to the site—a professional is never lost.
- If you are unsure of whom you will be checking in with when you arrive on site, call your contact ahead of time to verify the check in process.
- Ensure your contact has your current phone number.

On-Site Protocol: Your professionalism greatly affects your SLA review.

It's important to follow these guidelines so that you avoid escalation (conflict) from on-site management, and represent your client in the most professional manner possible.

The on-site manager will need to verify who you are.

Always have a government issued ID, a printed hard copy of your work order, and the name and phone number of your contact person.

Know Your Customer!

Make sure to check your work order for any specific instructions. Always check the work order and all provided documentation to make sure that you know the correct protocol for the field event you are working on. One client may expect you to engage in a particular manner that is different than another client's expectations. When in doubt with any situation, remove yourself to a private area and call your contact.

Work orders will often have specific instructions on how to submit completion reports via signoff sheets, pictures, or a variety of other things. Make sure to follow these instructions so that the job is completed as intended by your client and the company.

The company hired a professional—dress accordingly.

When not specifically told what to wear, assume a clean and professional dress code, which includes khaki pants, a collared shirt, and close-toed shoes other than tennis shoes. Do not wear frayed or worn clothing. Maintain good grooming, including hair, facial hair, and nails.

Be prepared; bring extra supplies (when allowed), but not extra people.

It is NOT OK to bring an assistant unless the work order specifies that you should, and the person with you is approved to help you. DO NOT bring your girlfriend/boyfriend, dog, gun, or anything else that wouldn't be appropriate. Not only is this unprofessional, but you may be breaking the law.

Many customers have strict rules about what should, may, and may not be brought on site. For example, one client may require that you have a camera, where another may disallow bringing cameras on site. Check for restrictions before bringing computers, cameras, thumb drives or other equipment on premise

Maintain professionalism when performing the work.

If site staff happens to be using equipment that you will need to work on, you should always call your contact to find out what course of action you should take.

You may run across times when you get stuck on an install or need some technical help. If this happens, remove yourself to a private area and call your contact or Team Lead for advice. Do not simply try to work through the situation without any help, and don't tell the site staff that you just don't know what to do.

It can be useful to contact your Buddy Network for assistance if the job is a private-client job (always call your contact or Team Lead if it is not a private job.)

Do not touch anyone. If the staff wants to shake hands, do the polite thing, but do not initiate any physical contact with anyone, even to get their attention.

Sometimes the staff asks difficult questions.

If you find yourself having an issue with a staff member, politely move away from them to a private location and call your client contact for a solution.

You are a professional and should not discuss personal issues with the staff; furthermore, you are strictly prohibited from discussing your wages at any time, for any reason, with anyone. If the staff is being chatty, be polite as you continue to work, but do not disengage from performing the work you are there to do. Do not make negative or inappropriate comments about your client, the customer's help desk, associates, or products.

There may be times when staff will ask you to do a task that's outside of the scope of work you are there to perform. If this occurs, you should politely let them know that, due to time constraints, you can only perform the task you were specifically hired for, but that you can request your contact to send out another technician, if needed. Remember that it's important to always maintain professionalism when dealing with an issue like this, or any other various issues that may arise during a field event.

Quality work sometimes takes a little longer than expected.

This is a topic that different clients have different protocols for—make sure to check your work order. In the event that work runs longer than expected, some clients will want you to work through for 10-15 minutes before calling your contact to discuss; some do not want you to spend any additional time to work through issues. Remember to know your client's expectations, and check your work order for any specific instructions.

If customer or job-specific protocols have not been given, you can use this rule of thumb: If you're SLIGHTLY delayed by 10-15 minutes, then try to keep working until you get the job done, and call your contact later to discuss compensation. If you're SIGNIFICANTLY delayed, then call your contact from a private location to discuss the issue. If, for any reason, you can't finish an install, make sure to call your contact right away to let them know of the situation. Do not simply leave and deal with the issue later on, in any situation.

If you have been provided a schedule on a deployment, you must stick to that schedule. Report any delays to your Team Lead or contact.

Be a good Team Member

When working as part of a team, it is critical that you be a team player: follow the organizational communication protocols and chain of command that are set in place.

As a seasoned professional, you have picked up some tricks of the trade along the way. However, don't take shortcuts when provided with specific scripts.

Going outside the order or methodologies in provided documents can create unforeseen issues and impact SLAs. If you have an idea for doing things a little differently, speak with your Team Lead before any deviation.

The following is a list of specific things that could lead to uncontrollable escalations during an install. This includes, but is not limited to:

- Showing up late for a work order (without making the appropriate calls)
- Failure to show up at all for a work order (without making the appropriate calls)
- Showing up in unprofessional dress
- Failing to bring proper documents, including proper identification
- Bringing unauthorized people, pets, or things along
- Behaving unprofessionally toward the site staff or otherwise. This includes, but is not limited to:
 - Arguing with on-site staff

- Discussing wages, personal issues, or other inappropriate communication with staff
- Borrowing equipment
- Failing to do the work properly
- Failure to follow an installation schedule or protocols
- Leaving the job site while in progress, without authorization
- Leaving before all work is finished, without authorization

Your Reputation is everything. Maintain your Service Level Agreement (SLA).

Service Level Agreements are in place to ensure that the client (the company connecting you with work) delivers on its promise of quality service to the end user. As a field technician representing the client, you make or break this contract with your professionalism. With positive feedback, you can cultivate a reputation of reliability, which will bring you more referrals for future work.

Conversely, *just one no-call/no-show*, even on a 1000+ site project, causes severe repercussions including:

1. A permanently tarnished professional reputation
2. Substantial non-compliance fees for the client, who, as mentioned before, connects you with work opportunities
3. A compromised relationship between the client and hiring company at the highest levels of management
4. A loss of larger client-company contracts, damaging working opportunities for you and your peers
5. Removal from the client platform, and loss of future work opportunities for you

In order to fulfill the SLA requirements, it is of particular importance that you not only show up to every install, but also that you show up *on time*. It is equally as bad, in terms of SLA penalties, for a technician to be late to an install than it is to not show up at all. For this reason, arriving to every install on time should be your top priority. If you ever happen to be running late (it happens), *make sure* to call your contact and let them know right away.

Always call your contact to let them know if you, for any reason, may be late or have to miss a field event.

You are applying to a superior network of electronics technicians and service providers, who, through their quality service, collectively contribute to this superior brand. Your reputation not only determines your success, but also impacts your peers in this industry.

**ABOVE ANYTHING ELSE IN THIS COURSE, REMEMBER THAT IT IS
CRUCIAL TO:**

1. ARRIVE ON TIME (and don't leave early)
2. CALL IF YOU WILL BE LATE
3. CALL IF YOU CANNOT MAKE IT AT ALL

While a professional dress code and proper installation, among other things, are crucial, showing up on time is your very highest priority. As mentioned before, SLA penalties incurred as a result of failure to show up are the same as those incurred due to late arrivals. In other words, showing up late is, in a way, essentially as bad as not showing at all. If you are at risk of not arriving on time or to the site at all, then call your contact immediately, before anything else. **You won't be admonished if you happen to be running late or you can't make it, but if you don't call your contact, then you may end your professional career as a field technician.**

It's as simple as 1-2-3.

- 1.** Call your contact as soon as you think you can't make it. Do this before anything else.
- 2.** Go to your Buddy Network to see who might be available as a suitable replacement. They will appreciate the referral!
- 3.** Call your contact back if you've found a replacement, and provide them with that referral information.

DO NOT ignore the assignment and hope that the client finds a replacement.

DO NOT just send your buddy directly to the site—always call your client and let them know that you have found a replacement first.

Work Protocol Recap

A little preparation and patience can go a long way. Remember to show up with proper documents and know a little something about the company, as well as your point of contact before you arrive. Make sure to know whom you are representing as well; check the work order to be sure of this, and to learn of any other specific instructions

If you have specific questions or concerns about solving a technical problem or other work-related issues, managing difficult staff, or about your next appointment, then find a private area and call your contact, or your Buddy Network if it's appropriate.

Make sure to avoid the main things that can cause uncontrollable escalations with on-site staff, and always maintain professionalism at all times.

If you can't make a field event, or may be late to a field event, but follow the proper procedures, your clients will think highly of you, give you higher ratings, and your reputation as a professional will spread amongst all clients.

If you can't make a call, or are going to be late, and you DO NOT follow the proper procedures, your reputation will be severely damaged and you will be denied access to future work from that client. Furthermore, the company can indicate a substandard performance in your profile, limiting your future work. They may even remove you from the platform entirely.