



Kepner-Tregoe® Foundation Course

Certificate: Kepner-Tregoe Foundation

Duration: 2 days

Course Delivery: Classroom

Course ID: ISM3210

Language: English

Credits: 16 PDUs, 16.5 CPEs

Course Description:

The 2-day Kepner-Tregoe Foundation course introduces a systematic process of problem solving when responding to incidents and problems. The course is designed for individuals who work in trouble shooting environments. This allows them to deliver a high level of quality and consistency in customer support. The course equips participants with the terminology, structure and basic concepts of Kepner-Tregoe's problem management and incident management techniques, such as Situation Appraisal, Problem Analysis, Decision Analysis and Potential Problem Analysis. During the Foundation course, participants will receive the proper training and guidance to optimally prepare them to take and pass the Kepner-Tregoe Foundation examination.

The Kepner-Tregoe Foundation course is beneficial for individuals who want to be trained and certified in a best practice that is recommended for problem analysis (Kepner-Tregoe is referenced as a best practice in the official ITIL® Service Operation publication).

Other core benefits of the Kepner-Tregoe Foundation course include:

- Establish a common troubleshooting language that ensures consistency in customer support in a Service Management environment.
- Introduce structured, critical thinking techniques to analyze problems, make decisions and proactively avoid problems.
- Use a systematic approach independent of technical expertise.

Audience:

The Kepner-Tregoe Foundation course will be of interest to individuals who:

- Want the official Kepner-Tregoe Certificate, issued by Kepner-Tregoe.
- Plan to attend the (2-day) Kepner-Tregoe Advanced Workshop in order to learn to implement the concepts learned in the Foundation course.
- Want to improve their Incident Management and Problem Management techniques.
- Typical roles are (but not limited to): Roles that provide first-line support, including service-desk staff, Analysts, Problem Managers, Incident Managers, Auditors, Quality Managers, Operators, Technicians and Engineers.

About Kepner-Tregoe:

Founded in 1958, the Princeton, New Jersey-based Kepner-Tregoe is the international leader in developing critical thinking skills. Kepner-Tregoe is a global leader in improving business performance through proprietary organizational transformation and troubleshooting methodologies. This proven methodology has been used to maximize service performance at global organizations, such as NASA, IBM, Sun Microsystems, RIM and Siemens.

Prerequisites:

There are no prerequisites to attend this course.

Learning Objectives

The course is structured around the KT Model. After this course you will be able to:

- Understand KT's Situation Appraisal, Problem Analysis, Decision Analysis and Potential Problem Analysis
- Explain the definition of an incident and a concern
- Use the role of questioning in various phases of the KT Model
- List Threats and Opportunities
- Use KT's Steps: Separate and Clarify, Set Priority, Plan Next Steps
- Work with all phases in Problem Analysis: Describe Problem, Identify Possible Causes, Evaluate Possible Causes, Confirm True Cause
- Work with all phases in Decision Analysis: Clarify Purpose, Identify Alternatives, Evaluate Alternatives, Make Decision
- Effectively Present Recommendations and Assess Recommendations
- Work with all phases in Potential Problem Analysis: Identify Potential Problems, Identify Likely Causes, Take Preventive Action, Plan Contingent Action and Set Triggers

Day 1	Day 2
Introduction	Problem Analysis
Questioning Skills	Case Study
Discovery Case- Donut Case	Review
Break	Break
Process Overview	Decision Analysis
	Case Study
	Decision Analysis
Lunch	Lunch
Situation Appraisal	Case Study
Case Study	Review
Situation Appraisal	Potential Problem Analysis
Case Study	Case Study
Review	
Break	Break
Problem Analysis	Feedback
Case Study	

Course Material:

You will receive:

- Workbook
- Job Aids
- Case Studies

You will be provided with a complimentary copy of the "*New Rational Manager*" eBook, courtesy of Velocity Knowledge and Kepner-Tregoe.

About the Examination:

- The Kepner-Tregoe Foundation Exam is an online exam. We recommend that the exam be taken a couple of days after the course at a convenient date and time. This will require that the candidate selects and registers a proctor who will supervise the exam delivery.
- In order for participants to be eligible to take the Kepner-Tregoe Foundation Exam, they have to participate in an accredited Kepner-Tregoe Foundation training course for 2 days.
- The 40-question, multiple-choice exam is a closed-book exam, taken online, that will test your understanding of the contents of the Kepner-Tregoe Foundation course syllabus.
- Exam duration is a maximum of 60 minutes for all candidates.
- Pass score is 26/40 (or 65%). No negative marking.

Course Outline:

A. Introduction:

- a. 7 Rules for Mission Critical Success
- b. Questioning and Listening Skills
- c. Typical Support Organization Issues
- d. Typical Support Personnel Issues
- e. Typical Support Organization Needs
- f. I'm an Expert Why Process?
- g. Learning Process
- h. Definition of a Process
- i. The Role of Questioning in the Thinking Process
- j. The Role of Thinking in the Fundamental Processes
- k. The Troubleshooting Process
- l. The Thinking Process Introduction

B. Introduction to the Kepner-Tregoe Rational Process:

- a. Situation Appraisal
- b. Problem Analysis
- c. Decision Analysis
- d. Potential Problem Analysis

C. Situation Appraisal:

- a. The Definition of an Incident and a Concern
- b. How to List Threats and Opportunities
- c. Separate and Clarify
- d. Set Priority
- e. Plan Next Steps
- f. The Role of Questioning in "Situation Appraisal"

- D. Problem Analysis:
 - a. The Kepner-Tregoe Definition of a Problem
 - b. How to Describe Problem Analysis
 - c. Identify Possible Causes
 - d. Evaluate Possible Causes
 - e. Confirm True Cause
 - f. Explain the role of questioning in Problem Analysis

- E. Decision Analysis: The Definition of a Decision.
 - a. How to Clarify Purpose
 - b. Identify Alternatives
 - c. Evaluate Alternatives
 - d. Make Decision
 - e. The Role of Questioning in Decision Analysis
 - f. How to Effectively Present Recommendations and Assess Recommendations

- F. Potential Problem Analysis:
 - a. The Definition of an Action and a Plan
 - b. How to Identify Potential Problems
 - c. Identify Likely Causes
 - d. Take Preventive Action
 - e. Plan Contingent Action and Set Triggers
 - f. The Role of Questioning in Potential Problem Analysis

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