Help Desk Software Evaluation Checklist

By Adam Hughes

- ☐ Customer Base
  - ☐ Location. Are they mostly internal or external to your organization?
  - ☐ Tech savvy. Evaluate the overall technical aptitude of your customers.
  - ☐ Communication. Decide which modes work best.
  - ☐ Motivation. Do they seek answers on their own first?
  - ☐ Size. How many customers do you have?
- ☐ Current Help Desk Operations
  - ☐ Location. Do staff work on-site, off-site, or both?
  - ☐ Tech savvy. Evaluate the overall technical aptitude of your employees.
  - ☐ Workflow. Are there changes you can make to improve efficiency?
  - ☐ Knowledge Base. Do you maintain a repository of helpful articles?
  - ☐ Activity. How many help tickets do you process in an month?
  - ☐ Reporting. Who needs access to your activity reports?
  - ☐ Current Software System. What are its strengths and weaknesses?
- ☐ Software Selection and Implementation Project
  - ☐ Budget. How much can you spend?
  - ☐ Timeline. When do you need to finish?
  - ☐ Staff Availability. How much staff time per week can you dedicate to upgrading your help desk software?
  - ☐ Decision Making. Who will evaluate potential help desk software systems?
  - ☐ Service Disruption. Can your business tolerate an interruption in help desk operations during the upgrade?
- ☐ Potential Help Desk Software Solutions
  - ☐ Initial cost. How much will the software and licenses cost?
  - ☐ Training. How much does it cost and how is it delivered?
  - ☐ Expandability. Can you add users without incurring additional costs?
  - ☐ Technology. Is the software hosted, or does your company need servers and IT staff?
  - ☐ Update path. Does the license include all available updates?
  - ☐ Reporting. Does the software provide the reporting you need?
  - ☐ Integration. Can the software work with other applications?
  - ☐ Workflow. Will you need to change the way you do business to fit the software?

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- ☐ Try first. Will the vendors give you access to trial versions of their software?
- ☐ Knowledge Base. Does the software support the development of an article repository?
- ☐ Migration. Can you import existing help desk data into the new software?
- ☐ Statistics. How granular can you make incident tracking?
- ☐ Contract. How long is the contract, and can you opt out at some point?