

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?

- ☐ **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?