

# 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?