5 Steps to an Effective Help Desk Process
Help for a Smoother School Year

Rough school year starts are on the rise in districts where help desk procedures are not in place. Learn the top 5 steps to setting up an effective help desk process.

One

• **Architect the technology support process.** Map out how you want the support process to be handled. Who can contact the help desk? What are the highest priority requests? How and to whom do help issues get routed? What routing steps can be automated?

Two

• **Establish the ways in which end-users will initiate help requests.** Determine logistically how requests will be submitted. Phone? Email? Web submission?

Three

• **Use a database-driven ticketing system so that regular reports can easily be generated.** Picture what you need to report and communicate to administration. Build the help collection form in a database that enables the required snapshot reports to be automatically generated.

Four

• **Establish a call center and triage process.** Set up the call receiving procedure from end-user help request, to triage and troubleshooting, to ticket and automatic routing, to and through issue resolution.

Five

• **Plan for in-depth quarterly analysis to improve process and ID cost-saving opportunity areas.** Analyze ticket data. Identify frequent issues. Determine where cost-saving on-initial-call resolutions can be established. Improve the process.