10 simple rules for buying a helpdesk system

Follow these ten rules to get your helpdesk started on the right path. Whether you are buying for the first time or just replacing your current system, this whitepaper aims to provide concrete advice on buying and implementing a helpdesk system. Below we have condensed the information down and focused on what really matters, and equally important on what to avoid, so that you can confidently select and roll out a system that will meet your needs today, as well as offer you vital flexibility for tomorrow.

1 Create a project brief and identify requirements

Process - Start by outlining and documenting all current business processes and procedures with your helpdesk. The system you select should be able to grow and adapt with your organization. Take the time to note any existing shortcomings and add those scenarios as criteria for your new system. Lastly, list all of the business requirements that you have and create a matrix of their relative importance to your organization. Many IT teams classify criteria into three groups, “must have”, “nice to have” and “could have”.

Metrics - Develop a short list of five or six key metrics that you want to capture and track over time to ensure that your investment continues to pay off and future changes are not detrimental to the original objective. Analysts have said that one of the biggest mistakes organizations have made when implementing a new solution is either not tracking any metrics or only tracking metrics for six months to a year. The companies that don’t keep track of metrics pay for it in the long run as they have no insight into their system, how it is working, or what can be improved and/or streamlined. Best practices dictate that in order to truly get the most from any system implemented, Return on Investment (ROI) and system optimization metrics need to be maintained for the lifetime of a system for organizations to benefit from its true potential.

People - Last but not least, get buy-in from end-users, helpdesk staff, and upper management to ensure the maximum return on your system. The trick is outlining the business benefits and impact on bottom line – not just the number on the final invoice but how much else is gained – employee productivity, self-service automation, etc. Invite upper management to say a few words at the beginning of launch meetings and trainings about the importance of the new system. Help desks are rarely successful without upper management’s support.

Common pitfalls

Dedicating insufficient internal resources for implementation and integration with existing systems

Allocating insufficient resources and time for end user and technician training

Leaving the data migration plan to the last minute

Not deciding how to leverage the existing helpdesk data whether by importing it into the new system or accessing the old system as a reference.

2 Budget and time scales

It is important to set a budget early on in the project as that will save a lot of time when selecting vendors since it's not prudent nor the best use of your time and resources to evaluate systems that are out of reach for the project. The best way to start is normally to do some basic ROI calculations and determine where you can make substantial savings with a new system.

It is also important to create time scales for the selection, evaluation and implementation of the new system. In looking at the budget, you need to evaluate both short and long term costs associated with thepurchase to make the correct decisions during the process.

Another area to look at is Total Cost of Ownership (TCO), which is more than the original cost of purchasing hardware and software. TCO must include all direct and indirect costs associated with the system, over a minimum 3-5 years, to reflect the true cost over time.

Make sure to compare costs of a new system against what you are currently paying. If the current system isn't fulfilling your requirements and you are looking to replace it, why should you expect to pay the same price? Finding the solution that is right for you and can be customized to meet your unique needs is paramount – not the price. Keeping this top-of-mind, the system you end up with could even be cheaper. Often companies buy big product packages; and, while these options give organizations a lot of features, if they aren't using them then its money and implementation time wasted.

Common pitfalls

Companies often evaluate systems as a whole instead of looking at different parts or applications within a system. You may not need all of the bells and whistles from a given system to maximize your efficiency and ROI.

Set a realistic timeline for purchase through to implementation, projects often fail before they get off the ground because internal opinions conflict about how long the entire process should take.

3 Scalability and architecture

It is very important that a system has the capability of being extended, not only from the point of adding processes outside of IT Service Management and ITIL, but also having the ability to add additional monitoring systems and legacy systems. Second, it is vital that the underlying database be accessible for both additional reporting and data mining. Without "free" access to the database you might find that as soon as you need to export/import data or introduce fields and values that are not a part of the helpdesk system, it will be both expensive and difficult. Furthermore, to minimize the deployment costs you must make sure the helpdesk database requirements support open source databases such as MySQL.

It is also important that the system support multi-channel communications since different teams and departments may have different requirements. The system should also support access though a portal, email and mobile access at a bare minimum.

Finally, check what processes are included out of the box; minimum should be incident, problem and change tracking to be able to execute any form of the ITIL framework.

Common pitfalls

Many companies do not evaluate the entire cost of the system including third-party applications that help push up the price tag. Consider adding third-party application requirements to your system evaluation criteria.

Some companies find a system that will meet their current needs, but is not flexible enough to adapt to future needs. Consider systems that offer more functionality than you may initially need. You want to avoid revisiting the evaluation process 18 or 24 months down the road.

4 Information management

A vital part of any help desk system is how it manages information such as knowledge, user guides, FAQs, etc. For a helpdesk to be effective, knowledge management needs to be easily and readily accessible for the staff to avoid increasing the call and handling times for the helpdesk. The best option is an integrated knowledge management system that gives the ability to give end users solutions when they attempt to log a call and thus prevent the call coming to the helpdesk. Also, helpdesk staff needs to have the ability to publish knowledge easily from existing calls.

There should also be the ability in the knowledge base to rank and rate information to enable both the system and appointed administrators to "learn" what information is useful to the end-users. This allows for the system to display more relevant information as the system evolves. Furthermore, the system should provide some sort of version control as well as allowing for publishing FAQ lists and both keyword and free text searching.

Don't forget to check that helpdesk staff can see the knowledge inside the helpdesk system; introducing a separate system adds to the resolution times.

Common pitfalls

Forcing helpdesk staff to juggle among multiple systems decreases efficiency and increases resolution time per incident. Your IT service levels and staff satisfaction will be better served by a single solution that meets most of your needs.

Not having a knowledge management owner, who can enforce consistency and make sure knowledge is presented in an optimal fashion as well as retire old knowledge.

5 Web clients and Self-service

Web clients are a must! They do not require any complex "roll out" procedure to deploy in large organizations – all that is needed is a web browser. Other benefits are that browser applications require no disk space or any upgrade procedure since all new features are implemented on the server and automatically delivered to the users. Speed is also a big benefit because a web client doesn't have to keep referencing the database which greatly cuts down on time. Web-client architecture also allows for a higher level of requests to be handled more easily and, since data is centralized, it is easier to maintain. Also, they provide cross-platform compatibility in most cases (i.e., Windows, Mac, Linux, etc.) because they operate within a web browser window.

Self-service is the easiest way to save on IT costs. A large portion of time is taken up by responding to routine or common questions and problems. By enabling employees to find their own answers, you not only free up time but can also offer 24x7 support. To maximize effectiveness, the self-service portal should be a single-access point for end-users to report problems, request service, download software, access request forms and search existing knowledge.

Common pitfalls

Checking the box – take the time to really evaluate each vendor's employee self-service portal. For employees, this is the face of the IT services and helpdesk and it is how they see you and your brand. Make sure the portal is intuitive and offers all of the functionality your employees (your customers) want and need. You may also want the ability to customize the portal with your company or IT department brand and logos.

Ensure that the web client is built on a robust foundation. A web client not built on a solid architecture will cause more problems and be at risk for common data overloads and slow transaction speeds.

6 Automation

The quickest and best way to improve the ROI on a helpdesk investment is to automate processes within the helpdesk tool. The system should be able to handle dynamic resource allocation and route incidents and problems to an appropriate team member by expertise, availability or a combination of both. It should also support automatic escalations and be able to escalate incidents or problems based on a combination of categories and time criteria. It is also very important to make sure that the system caters to logging quick incidents which are repetitive and simple and don't need much information to avoid clogging the system with small simple tickets. Also, you will need to be able to attach incidents to a major problem or incident when there is a massive outage.

You should be able to do automatic satisfaction surveys or follow-up emails as a result of logged helpdesk calls. By building auto responders into the system, your support staff can concentrate on solving tasks, not completing paperwork.

Another area for automation is password resets and approval processes. The system should allow users to reset/change their Active Directory password using the password reset forms as well as supporting approval processes such as purchase orders and new starters etc.

Common pitfalls

All vendors are not made equal. Understand each solution and whether or not they are customizable enough to meet your needs – not to mention how customizations are implemented. You want to be able to make changes yourself without calling in third-party consultants and to automatically publish changes with no downtime, something third party consultants and large systems often cannot deliver.

Not thinking through automation needed at the outset of a project always leads to future issues. This is one requirement that if fully thought out will save a lot of time and headache down the line.

7 Dashboards, reporting and alerts

The system should have a "home page" for announcements, personalized information and the ability to display interactive and customizable information for all business processes. Users should be able to customize report widgets, create drill-down pivot charts, choose page layouts and language settings, and easily organize their user interface by dragging and dropping the various page elements.

Reporting should be able to cover all the common areas and come with a range of 'out of the box' reports that are easily customizable. There should also be access to reports outside the system for casual users or managers that do not require use of the full system.

Some areas often forgotten when looking at systems are making sure the system has the ability to add 3rd party reporting, such as Crystal Reports or MS Excel to extend the reporting capabilities, and the ability to export data for reporting, forecasting and data mining.

Alerts should be possible on all types of events and cover several mediums such as email, on-screen, dashboards, SMS, pager etc. You should have the option to color code events to quickly see what is urgent. This helps to escalate relevant alerts and to manage visibility.

Reports, dashboards and alerts should be customizable for a customers' brand. It is important that en users see a cohesive look and feel across all communications they receive. This will ensure customers have the feeling of unified services – whether by self-service or direct contact.

Common pitfalls

Some companies do not dig into specific reports to understand if they meet specific criteria that they want to measure over time. Make specific reports a part of your vendor evaluation criteria.

Most companies have omission and errors in their data – this renders most reports skewed at best or worthless at worst. Companies need to ensure the cleanliness of data is examined before rolling out reports.

8 Maintenance and administration

At a minimum you should be able to maintain and administer the system without any vendor interaction. A core requirement should be that any change to user interfaces, views, options and workflows can be done without any programming; consultancy help; or, most importantly, any downtime. A big consideration should be how the upgrade process is executed and it should not impact any customizations or user specific functions. Questions to ask is how flexible is the system and how easy is it to customize the GUIs, add or change screen data, and change workflows and business processes. You should also ask how you can extend the system outside of ITSM (i.e. Facilities, HR and Purchase Orders).

Not only will you have to maintain the system as is but you will also need to consider the ever changing world of business requirements and the system will have to adapt to new business needs/ strategy.

Common pitfalls

Some companies do not inquire about additional customization and the associated downtime after the initial implementation. These companies are surprised to find themselves paying high fees for implementation consultants every time they want to adapt their system. If you understand the total cost of ownership in terms of modifying different parts of the process over the long run this can be avoided.

Don't treat maintenance and admin of your support desk as standalone – investigate how other projects down the line will or could be affected. For instance, moving to a new support desk now and investigating upgrading or changing a reliant process/ application/software solution could affect each other. Know how before committing to either.

9 Licensing and deployment options

There are some real differences in how different systems are licensed which needs to be taken into account in the purchase and budget process. For example, if a perpetual license is offered then there are no annual costs and you own the license versus a normal license which has an annual "leasing" cost attached. Another area that can be difficult to understand is the difference between named and concurrent licenses and the differences in price are often staggering. As a rule, named licenses should be used for permanent staff that works with the system on an ongoing basis and concurrent licenses should be allocated to casual users. You should also allocate at least 5-10 users per license.

Nowadays there is a much larger market for hosted systems and software as a service (SaaS), which can result in great savings on the investment over the short term. However, it is important to understand that if you use it over a period of more than 3-4 years then the total cost of ownership is much higher than a traditional system. Furthermore, it is very important to ensure that if you decide on a SaaS system that you have access to export the data in case you want to move away from the selected platform. Most helpdesk vendors do support both traditional systems and hosted platforms. Traditionally you pay for hosted systems monthly with a minimum commitment of 6-12 months.

Common pitfalls

Some companies fail to balance the pros and cons of SaaS versus on-site systems. SaaS offers less upfront cost and significant flexibility in terms of considering alternative vendors, but long-term the price tag can add up. On-site systems are best when you are confident that the system will meet your organization's needs over the long run with a lower overall cost.

More customization needed may be harder to achieve in a SaaS solution – your solution is often co-hosted with other companies and heavy customization with cause data bleeding and potentially lower system performance.

You have no control over outages and are at the mercy of the SaaS vendors web provider.

10 Short listing and selecting a system

Short list no more than five or six vendors that fit within budget and scope for your project and score these vendors against a checklist of needed features and requirements.

Be clear in advance with vendors so that demos are tailored to your requirements. The key to a great demo is giving the presenter your unique requirements and challenges in advance of the demo. This way your needs are addressed and, with greater insight into your requirements, the vendor may have additional functions or features that would help you optimize your system that you may not have thought about.

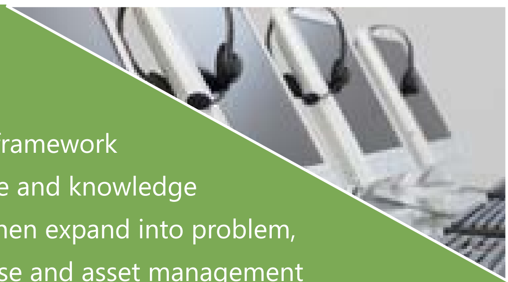
Explore all areas of the systems you evaluate, and take into account things like how scalable the system is and will it cost you more to add additional processes or features in the future. Make sure that the system is able to capture all of your business processes and procedures and that you can change them without help from the vendor as that will inevitable lead to high costs.

Finding a solution that will fit all the requirements can be difficult, but taking into consideration the following advice will help in making the best choice for your company.

Common pitfalls

- Evaluating a large number of vendors involves significant time and therefore cost. Limit your search to a half a dozen and quickly eliminate vendors that do not meet key criteria.
- Not fully understanding your entire requirements list. (1-9). Often you learn through the process of vendor selection and have to begin at the beginning.

Helpdesk selection and implementation can be daunting tasks. The above rules take the guesswork out of the process with industry best practices, point out common mistakes that you can easily avoid, and provide a solid foundation for you, your team, and your organization's success. Remember you do not have to implement all the bells and whistles straight away, just make sure the selected system has the capability to extend to the areas you have selected.



Most organizations start with a simple framework like incident, change and knowledge management and then expand into problem, configuration, release and asset management as they progress. Selecting the vendor that will address your current needs and grow as you do is the key.