

HELP DESK MODERNIZATION SELF-ASSESSMENT



A PRACTICAL GUIDE TO SPOTTING LEGACY FRICTION — AND KNOWING WHAT TO FIX FIRST

Check off any boxes that feel familiar:

- Tickets come in through too many places (email, spreadsheets, side conversations)
- Ownership is unclear — issues bounce between teams
- Agents spend too much time on manual updates and follow-ups
- Reporting is limited or requires heavy exporting
- Notifications create noise instead of clarity
- Workflows don't match how teams actually operate
- Visibility across departments or locations is difficult
- The tool feels harder to maintain than it is to use

If you checked 3 or more, your system may be creating more overhead than support.

Modern support teams prioritize:

- Centralized intake: One clear place for requests to land
- Smarter routing: Tickets reach the right group automatically
- Role-based visibility: People see what they need — nothing more
- Helpful automation: Templates, reminders, assignments
- Reporting over time: Trends, workload, recurring issues

Modernization doesn't have to be disruptive. Many teams start with one workflow, one department, or one pain point—then grow from there.

