

# Chapter 3: Implementing Help Desk Improvement Projects Worksheet

*This Help Desk improvement checklist worksheet is intended to be used in conjunction with the related chapter in the [Help Desk Management Book by Wayne Schlicht](#).*

The following are general overview steps for selecting, obtaining approval, and implementing Help Desk improvement projects.

## Step 1 – Take the Help Desk maturity assessment

Perform a maturity assessment of the current state and maturity of your Help Desk. Visit the Help Desk Management book's companion resource website and complete the Help Desk maturity assessment. To try the IT Help Desk Maturity Assessment, click the following link.

<https://buildahelpdesk.com/help-desk-maturity-assessment-guide/>

**Step 2 – Analyze the maturity assessment results.** Analyze the maturity assessment results by comparing each of the core area maturity level scores you received to the desired industry-standard performance level of level 4 or 5. To learn more about mature processes for each of the core areas, visit one or all the following resources.

- Read specific chapters of this Help Desk Management book.
- Information and blog posts on the book's companion resource site  
<https://buildahelpdesk.com>
- Subscribe to the Help Desk Management YouTube channel [Help Desk Management - YouTube](#)

## Step 3 - Design a future state process

In this step, you want to design a future state process for systems and services that make up the core areas that you scored low in the maturity assessment. In the chapter, we provided several improvement project recommendations. Ensure you obtain input about the future state design from internal team members, stakeholders, leadership, and customers.

## Step 4 - Identify the resources needed

Documenting the people, funding, and technology items needed to design, build, and implement the future state processes. This information will assist you in determining project funding and a timeline to build a business case or budget request.

## Step 5 - Obtain improvement project approval

Obtain approval to use company resources for the improvement project. Some improvement projects are smaller in scale. It might mean you already have the resources and authority to start

improving the process. Other projects may require significant time and money. For these project requests, follow your company's approval process.

## **Step 6 - Initiate the improvement project**

Execute contracts for contractors, vendors, and technology hardware and software.

## **Step 7 - Complete the project**

Implement the future state process.

## **Step 8 - Train your staff**

Train the resources that will be using the future state process.

## **Step 9 Customer communications**

Communicate and educate the customers about the new process.

## **Step 10 - Decommission the legacy process** - Decommission the legacy process, including applicable licenses, equipment, software, and contracts.