Chapter 5: Employee and Customer Support Structure Worksheet Checklist

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](#).

We discussed the basic organizational and support structure processes at the Help Desk. This worksheet is a checklist built from the last chapter. Your goal is to review the organizational and support structure processes you have in place and to determine what areas of improvement are needed.

Checkpoint 1 – Validate you have the following policies in place and active.

1. **Attendance Policy –** A document to inform employees how different types of planned and unplanned leaves will be handled.
2. **Schedule policy –** This document will outline the available shifts at your Help Desk. It should outline critical procedures such as how to request shifts and how shifts are awarded.
3. **Security policy –** The Help Desk security policy is more than the general computer and network use policy for end users. The Help Desk security policy should also cover Identity and Access Management (IAM) processes owned by the Help Desk.
4. **Customer call and ticket handling policy –** Customers have the right to be treated fairly and the same. This policy will outline those rights.

Checkpoint 2 – Validate the policies that have been reviewed by management in the last 12 months.

Checkpoint 3 – Validate a read-only accessible policy repository is in place and being used to store and display departmental policies.

Checkpoint 4 – Do you have a communication process in place to let employees know where these policies are located?

Checkpoint 5 – Do you have an active employee policy training program in place?

1. Onboarding
2. Annual training
3. Just in time training.

Checkpoint 6 – At the conclusion of employee training, do you have employees sign a statement that they understand the policies?

Checkpoint 7 – Do you have a customer information-sharing portal and share the following information?

1. Contact channels available and attributes of each.
2. The hours of operation of the Help Desk are posted.
3. An after-hour escalation process to follow when there are urgent issues.
4. Languages are available for support.