 **HELP DESK SOP TEMPLATE**

Help Desk Standard Operating Procedure

COMPANY NAME

Street Address

City, State and Zip

webaddress.com

Version 0.0.0

00/00/0000

department responsible

| VERSION HISTORY |
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| VERSION | APPROVED BY | REVISION DATE | DESCRIPTION OF CHANGE | AUTHOR |
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**INTRODUCTION**

*Describe the purpose of your help desk department in terms of who your customers are and what their needs are.*

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**HELP DESK PROCEDURES**

**USER RESPONSIBILITIES**

*Describe user responsibilities for ensuring issues are reported and addressed.*

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| **SUPPORT PORTAL** phone number / address / link |
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| **ISSUE LOGGING METHOD** |
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| **TICKET COMPLETION** |
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| **SETUP AND SUPPORT REQUEST LEAD TIME** |
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| **ESCALATION POINTS OF CONTACT** |
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**HELP DESK SYSTEM**

*Describe what the user can expect in response to submitting a ticket. Indicate whether the user can expect an email acknowledging receipt, the details included, and whether a deadline for response by support personnel will be included. Explain what the user should do if they do not receive a response within the described time. Describe how a ticket is closed and whether users receive surveys. Include the preferred steps a user should take if service was unsatisfactory and to whom to report concerns.*

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**HELP DESK STAFF RESPONSIBILITIES**

*Outline staff commitments. For example, dealing honestly in describing problems in language the customer can understand and acting with sympathy for customer inconvenience. If there is a commitment or service level agreement to prioritize certain issues, describe that here.*

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**HELP DESK OPERATING HOURS**

*Describe in as much detail as possible, including the schedules for statutory holidays.*

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**HELP DESK WORKFLOW**

*Describe your workflow from when a customer enters a ticket. Discuss how customers know their ticket has been received, how tickets are routed to customer service agents, and any pertinent steps. It can be helpful to depict the process in a flowchart.*

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**HELP DESK FLOWCHART**

*A flowchart can help to show what actions to take to complete a helpdesk ticket based on certain conditions.*

STEP

START / END

INPUT / OUTPUT

DOCUMENT

DECISION

**YES**

**NO**

CONNECTORS

**KEY**

**YES**

**NO**

COPY AND PASTE

BLANK ICONS

BELOW

**YES**

**NO**

**PRIORITY MATRIX**

*A priority matrix helps support staff to understand how to prioritize tickets based on information supplied by the customer. You should define your priority matrix and escalation procedure in your SOPs. The matrix below shows common prioritizations, but these can be customized to your own organization.*

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| **CRITICAL** | Critical tickets may prevent a customer from working or cause other devastating consequences. These tickets are often worked first or passed to a senior team member. |
| **HIGH** | High priority tickets may affect multiple staff members, customers, or departments. |
| **MEDIUM** | Medium priority tickets may affect a limited number of departments or customers. Customers may be able to continue work by applying a workaround.  |
| **NORMAL** | Normal priority tickets affect only one or two customers and may present an inconvenience, but do not impede work.  |

**ESCALATION**

*Describe your formula for escalating tickets.*

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**EXAMPLES**

*Describe the details of a typical ticket, from submission to resolution*

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