

# Chapter 21: Marketing the Help Desk

## 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](#).*

Below are several projects to start marketing the Help Desk. For each of these projects, you should have a person assigned to lead the effort.

### Step 1 - General Information

Gathering, organizing, and providing general Help Desk information is the first step in marketing your services.

1. Gather all the official Help Desk general information.
  - a. Phone number
  - b. Email address
  - c. Website or portal URL
  - d. Social Media
  - e. Hours of operation
  - f. If applicable, after-hours information
2. Ensure all contact mediums are working correctly and you have the most up-to-date addresses.
3. Create a standard general information template to be used in all Help Desk publications, distributed material, and online presence.
4. Notify the entire staff that including the general information template in any customer-facing material is mandatory.

### Step 2 - Welcome Guide

A new employee welcome guide featuring Help Desk services available is one of the most important marketing tools you can implement.

1. Create or update an existing welcome guide. Include the following information in the welcome guide.
  - a. Include the general information gathered in step 1.
  - b. Include getting started type information needed for a new employee using company technology such as email, voicemail, and login information.
  - c. Include quick reference guides for commonly used applications.
  - d. Frequently asked questions and solutions should also be included, such as how to reset passwords with the self-service tool.
  - e. Important new employee information from other departments such as facilities and HR should also be included.

2. Create a process to place the welcome guide where the new employee will receive it on their first day of work. Typically, it is placed along with their newly assigned computer. If they are working remotely, send the welcome guide with the laptop shipped.
3. Every month run a report on all Help Desk tickets created for last month's new employees. This will help you identify what questions they asked and the issues they reported. Analyzing this information may lead to welcome guide updates.
4. Meet with new employees to obtain feedback about the welcome guide and onboarding process.

### **Step 3 - Informational Roadshows**

1. Meet with department leaders and request an opportunity to give a Help Desk presentation during their team meeting or another event.
2. Run a report on the Help Desk tickets recently created for the department users.
3. Create a presentation to show the department users what their most frequent issues and questions are. Provide tips and solutions to these issues and questions.
4. Have an open question period on the agenda so a Help Desk representative can answer questions the audience may have.
5. Document the meeting discussion and ensure to act on any follow-up items from the meeting.

### **Step 4 - Technology Fairs**

1. Seek approval from HR and IT leadership to hold a technology fair on the company property.
2. Meet with Information Technology managers to enlist their team's participation in the technology fair. Each manager should host a booth or table to display their area of expertise.
3. Secure a location to hold the technology fair. Suggested areas are conference rooms, large hallway, courtyard, or other outdoor areas.