

# Chapter 29: Problem Management 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](#).*

## **Step 1 – Prioritizing problem management investigation candidates:**

A problem investigation is initiated by identifying IT service issue candidates. Problem management candidates can be identified by any or all the following methods.

- Mandatory for Priority 1 incidents and highly recommended for Priority 2 incidents that caused a recent service degradation or outage.
- Technical staff, including Help Desk Agents, level 2, level 3 resolver teams, developers, application owners, and management, nominating problem candidates.
- Customer and business partners reporting critical service-impacting issues.
- A proactive Incident trend analysis.

## **Step 2 – Gather the data:**

Once the problem management investigation candidate has been identified, it is important to gather the foundational data about the problem.

If a service outage occurs, develop a timeline of events for prior, during, and after the outage. The Help Desk can assist with a large amount of this data.

- Gather and assess error, diagnostic, and monitoring information.
- Gather the number of Incidents related to the Problem
- Review the frequency of this problem by searching the Help Desk ticket data.
- Was a change recently implemented that could have caused this problem?

## **Step 3 – Form a problem review team**

Identify the needed technical staff, Help Desk Agents, and customer representatives need to meet and review the following quickly:

- Review all available foundational problem data.
- Identify likely causes.
- Discuss any contributing factors.
- Eliminate likely causes until you have the most probable cause remaining.

- Identify the root cause.

#### **Step 4 – Propose and implement a solution**

- Document a Request for Change for any action you intend on taking to resolve the issue.
- Submit a Request for Change or implement solutions that do not require Change management.

#### **Step 5 – Validate the fix**

- Confirm success/failure of Approved Change.
- Have the customer validate the problem does not occur anymore. Monitor Help Desk tickets for future re-occurrences.