



**INFO~TECH**  
r e s e a r c h g r o u p

Practical IT Research that Drives Measurable Results

Help Desk Software Shortlist for  
SAMPLE CLIENT  
April 2010

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# Executive Summary

- SAMPLE CLIENT has engaged Info-Tech Research Group (Info-Tech) to develop a help desk software shortlist.
- Info-Tech has identified six help desk software vendors that meet SAMPLE CLIENT's business, technology, and budget requirements.
- However, before making an investment in a help desk solution, Info-Tech recommends that SAMPLE CLIENT examine the possibility of sharing a hosted solution with its current Tier 1 outsourcer, PC Helpline.
- If investing in a new solution is found most appropriate, Info-Tech recommends that SAMPLE CLIENT evaluate the viability of on premise or Software as a Service (SaaS) offerings in their environment. Beginning with a SaaS solution that permits easy transition to on-premise at a later time may be the best strategy.
- Info-Tech recommends the following on premise and SaaS solutions:

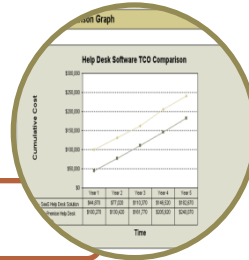
On Premise	On Premise / SaaS	SaaS
<ul style="list-style-type: none"><li>– <a href="#"><u>AdventNet ManageEngine ServiceDesk Plus</u></a></li><li>– <a href="#"><u>Numara FootPrints</u></a></li></ul>	<ul style="list-style-type: none"><li>– <a href="#"><u>Cherwell</u></a></li><li>– <a href="#"><u>TechExcel ServiceWise</u></a></li></ul>	<ul style="list-style-type: none"><li>– <a href="#"><u>Kaseya</u></a></li><li>– <a href="#"><u>TriActive</u></a></li></ul>

Client requirements  
omitted from this SAMPLE DECK

# Help Desk Software Selection Roadmap

SAMPLE CLIENT should take the following approach during product selection.

**Understand the Market**



Use Info-Tech's [Help Desk Software: TCO Comparison Tool](#) to evaluate if on premise or SaaS makes the most sense economically.

**Decision Point**

**On Premise**

- AdventNet
- ManageEngine
- ServiceDesk Plus
- Numara FootPrints

**SaaS**

- Kaseya
- TriActive

- Cherwell
- TechExcel
- ServiceWise

The table of contents lists sections such as: 1. INTRODUCTION, 2. SCOPE OF PROJECT, 3. PROJECT OBJECTIVES AND REQUIREMENTS, 4. PROJECT ORGANIZATION AND RESPONSIBILITIES, 5. PROJECT RISK MANAGEMENT, 6. PROJECT COMMUNICATIONS AND REPORTING, 7. PROJECT MONITORING AND CONTROL, 8. PROJECT CLOSURE AND EVALUATION.

Use Info-Tech's [Help Desk Software Evaluation and RFP Scoring Tool](#) to simplify the RFP process.

**RFP Issuing, Collection, and Scoring**

**Vendor Demonstration Scoring**

**Selection**

The table has columns for 'Feature', 'Weight', 'Score', 'Weighted Score', 'Total Score', and 'Rank'. It lists various features like 'Self-Service', 'Ticketing', 'Reporting', etc., and provides numerical scores for each.

Use Info-Tech's [Help Desk Software Demonstration Script and Scoring Tool](#) to evaluate vendor demonstrations.

# Info-Tech's Help Desk Vendor Short-Listing Approach

Vendors	Market Focus	Shortlist Candidate	Reasoning
BMC Remedy	Large enterprise	<input type="checkbox"/>	Did not meet budget requirements
CA Service Desk	Large enterprise	<input type="checkbox"/>	Did not meet budget requirements
FrontRange Solutions Heat	Large enterprise	<input type="checkbox"/>	Did not meet budget requirements
HP ServiceCenter	Large enterprise	<input type="checkbox"/>	Did not meet budget requirements
IBM Tivoli Service Request Manager	Large enterprise	<input type="checkbox"/>	Did not meet budget requirements
Symantec Altiris	Large enterprise	<input type="checkbox"/>	Did not meet budget requirements
Axios Systems Assyst	Large enterprise	<input type="checkbox"/>	Did not meet budget requirements
AdventNet ManageEngine ServiceDesk Plus	Midmarket	<input checked="" type="checkbox"/>	Meets requirements
Numara FootPrints	Midmarket	<input checked="" type="checkbox"/>	Meets requirements
Kaseya Help Desk	Midmarket	<input checked="" type="checkbox"/>	Meets requirements
Avocent LANDesk Service Desk	Midmarket	<input type="checkbox"/>	Overly complex to deploy
TechExcel ServiceWise	Midmarket	<input checked="" type="checkbox"/>	Meets requirements
Service-now.com	Midmarket	<input type="checkbox"/>	Overly complex design
Epicor ITSM	Midmarket	<input type="checkbox"/>	Complex to deploy
Cherwell	Midmarket	<input checked="" type="checkbox"/>	Meets requirements
Parature	Midmarket	<input type="checkbox"/>	Did not meet requirements
TriActive	Midmarket	<input checked="" type="checkbox"/>	Meets requirements

# On Premise: AdventNet ManageEngine ServiceDesk Plus

<ul style="list-style-type: none"> <li>• Supports all of SAMPLE CLIENT's business and technology requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Doesn't have a good remote desktop control solution</li> <li>• Built-in reports may not meet needs out of the box</li> </ul>	<ul style="list-style-type: none"> <li>• Markets with an annual and perpetual licensing model</li> <li>• Typical implementation cost for 10 agents (enterprise edition) is \$21,000</li> </ul>
<p><b>Benefits</b></p> 	<p><b>Cautions</b></p> 	<p><b>Budget</b></p> 

← Basic Features →		← Advanced Features* →	
Call Logging	<input checked="" type="checkbox"/>	Asset Mgmt	<input checked="" type="checkbox"/>
Auto Escalation	<input checked="" type="checkbox"/>	Custom Fields	<input checked="" type="checkbox"/>
Auto Ticket Response	<input checked="" type="checkbox"/>	Mobile Client	<input checked="" type="checkbox"/>
Reporting	<input checked="" type="checkbox"/>	Agent Chat	<input checked="" type="checkbox"/>
E-Mail Ticket Response	<input checked="" type="checkbox"/>	Purchasing & Contract Mgmt	<input checked="" type="checkbox"/>
Self-Service	<input checked="" type="checkbox"/>	Service Satisfaction Feedback	<input checked="" type="checkbox"/>
Knowledgebase	<input checked="" type="checkbox"/>	E-Mail Integration or Gateway	<input checked="" type="checkbox"/>
Advanced Workflow*	<input checked="" type="checkbox"/>	Outlook Integration	<input checked="" type="checkbox"/>
		Data Import	<input checked="" type="checkbox"/>
		Directory Integration	<input checked="" type="checkbox"/>
		Asset Mgmt CMDB	<input checked="" type="checkbox"/>
		Problem Mgmt	<input checked="" type="checkbox"/>
		Change Mgmt	<input checked="" type="checkbox"/>
		Service Level Mgmt	<input checked="" type="checkbox"/>
		Sarbanes-Oxley Compliance	<input checked="" type="checkbox"/>
		Payment Card Industry Compliance	<input checked="" type="checkbox"/>

Supported requirement  
  Unsupported Requirement  
  Supported but not a requirement  
  Not supported

Remainder of individual vendor assessments  
(On-Premise and SaaS)  
omitted from this SAMPLE DECK

# Conclusion

- Info-Tech has identified six possible solutions that fit SAMPLE CLIENT's requirements.
- To get to a final decision the following tools will be of use:
  - [On-Demand vs. On-Premises TCO Calculator](#)
  - [Help Desk Software: Comparative TCO Calculator](#)
  - [Get Started Bringing Order to Help Desk Request Chaos](#)
  - [Help Desk Software Evaluation Tool](#)
  - [Help Desk Software Demonstration Script and Scoring Tool](#)

# Appendix I: Basic Help Desk Features

When looking to define your software requirements, review your existing technology environment, and take the time to evaluate product features.

- Find out what type of client operating systems the solution supports.
- Determine what software and hardware is required to run the application.
- Ensure that you inquire about the type of licensing: SaaS, On-Premise Subscription, On-Premise Perpetual.
- Know how long a typical implementation will take.
- Also, know how much a typical implementation will cost.

## *More Research:*

*For a more detailed understanding of the help desk software market, key features, and considerations, refer to Info-Tech's ITA Premium note, "Choose Your Help Desk Software Wisely."*

### **Everyone Should Have the Basics**

#### **Call Logging**

Enables staff to accept, prioritize, categorize, assign, and track issues or tickets.

#### **Auto Escalation**

Increases issue priority when an SLA is exceeded and generates escalation notification.

#### **Auto Ticket Response**

Automatically provides user submitted tickets via e-mail.

#### **Reporting**

Offers basic issue and productivity reporting.

#### **E-Mail Ticket Creation**

Automatically converts inbound e-mails into tickets.

#### **Self-Service**

Enables end users to access the system to create and track tickets.

#### **Knowledgebase**

Enables end users to access the system to research and resolve problems on their own.

## Appendix II: Advanced Help Desk Features

Must-Have Features	Nice-to-Have Features	IT Service Management Features
<b>E-Mail Integration or Gateway</b> IMAP and/or SMTP/POP for inbound and outbound communication.	<b>Service Satisfaction Feedback</b> Sends post ticket closure e-mail to end users and collects satisfaction feedback.	<b>Asset Management CMDB</b> Encompasses additional data required for an ITIL CMDB.
<b>Remote Control</b> Includes or offers remote control of PCs and servers.	<b>Mobile Client</b> Offers an installable mobile client, or Web accessibility tailored to mobile clients for use by help desk staff.	<b>Purchasing and Contract Management</b> Allows for creation of purchase orders and management of contracts, licenses, and support agreements.
<b>Password Reset</b> Enables users to initiate password resets.	<b>Agent Chat</b> Facilitates chat between help desk staff and end users.	<b>Service Level Management</b> Allows for the creation and maintenance of service level information.
<b>Asset Management</b> Collects and tracks hardware and software inventory and asset information.	<b>Outlook and Directory Integration</b> Integrates with Outlook e-mail and calendar. Some tools also integrate with LDAP, NDS, or Active Directory.	<b>Problem Management</b> Automatically identifies and tracks the root cause of incidents (generally linked to multiple tickets).
<b>Data Import</b> Imports data via CSV, XML, or other flat file.	<b>Monitoring</b> Includes or offers system monitoring and notification capability.	<b>Change Management</b> Tracks and manages change processes; links to incident and problem management.
<b>Custom Fields</b> Allows easy creation and reporting on custom form/database fields.	<b>Advanced Workflow</b> Has the ability to define workflows unrelated to escalation.	<b>Compliance with Sarbanes Oxley (SOX) and Payment Card Industry (PCI)*</b> Provides tools and generates reports that support SOX and PCI compliance and audits.

\* Optional