Assignment 3:  
 Weighted Evaluation and Management

*Pod 5*  
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*CSTN4015*

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## Introduction (Kyle W.)

In this document, our team has outlined the strengths and weaknesses of two ticketing software's for use in an IT helpdesk environment, Zendesk and FreshService, and created a weighted evaluation based on criteria we have outlined as the most important features to have in a ticketing system. After weighing each of the criteria and scoring them, we give our recommendation as to which software is more suited for a business's needs.

## Criteria (Kyle W.)

* Organization: How well are the tickets organized? How user friendly is the UI? Sorting tools? Customization? A disorganized or poorly designed UI would be harder to train new agents on and slower to navigate.
* Management: Are tickets easy for users to create? Are they assigned to the correct technician? Any quality-of-life features or ease-of-use implementations would increase productivity.
* Automation: Is the user and agent notified of changes to the ticket automatically? Are workflows implemented for users to solve simple issues themselves like password resets? Are tickets automatically distributed based on severity? (ie: ticket is automatically categorized as critical based on end-user form, immediately goes to Tier 2). Allowing users to solve basic issues themselves and getting more advanced support on advanced issues faster will help clear the queue more efficiently.
* KBA: Is a KBA inserted into the tool? Can end-users follow a flowchart/workflow to troubleshoot the issue themselves before a ticket is generated? This helps end-users learn as they diagnose their issue and helps prevent recurring issues.
* Pricing: How expensive is the license? Is there a trial version? Are there levels to their license? A cost vs. benefit analysis should be weighed depending on business needs. A small company of 20-30 employees probably won’t get much value out of a huge enterprise subscription.

## Weighted Evaluation Spreadsheet (Kyle W. & Hannah B.)

(Score out of 10, multiplied by weighted scale (ie 10 x 0.15 = Weighted Score))

*Table 1: Scored out of 10 per criteria, weighted based on percentage and added for total*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Organization (15%) | Management (20%) | Automation  (30%) | KBA  (10%) | Pricing  (25%) | Weighted Score  (0-10) |
| Zendesk | 10 | 8 | 10 | 10 | 3 | 7.85 |
| FreshService | 9 | 9 | 10 | 8 | 7 | 8.7 |

### Zendesk (Kyle W):

Organization: Zendesk offers a very clean and organized interface with filters, views and sorting capabilities to organize based on agent preferences. It also color-codes tickets based on severity and offers some monitoring metrics from its dashboard page. All crucial information is available at-a-glance from the dashboard, earning Zendesk a 10/10.

Management: Zendesk continues its great interface on the user end as well with an easy-to-understand interface with multiple channels for creating tickets and automatically assigns them based on ticket criteria. While this has all the core features we expect in the management criteria, nothing jumps out as a great quality-of-life feature different from other ticketing systems. 8/10.

Automation: Zendesk comes included with all the automation tools outlined in our criteria: auto-ticket routing, notification of updates, automated responses, and workflow triggers for common issues. You can also set up triggers based on ticket severity. 10/10.

KBA: Zendesk includes a comprehensive flowchart feature for educating users and assisting with troubleshooting. In addition, Zendesk includes an AI Answer Bot to assist with any additional questions the end-user might have, possibly saving valuable agent/technician time. 10/10

Pricing: This is where Zendesk takes a hit. While Zendesk does offer free trial services and many layers of pricing packages for their services, they start at around $19 per user per month, but this basic plan does not include many of their more useful features like automation, AI-powered assistance, custom workflows, etc. For these features, the price tag can get as high as $150 per agent/per month. While it does scale with larger companies with many users, small to medium-sized companies suffer from this pricing structure. 3/10.

### FreshService (Hannah B.)

Organization: FreshService has a very organized dashboard, which can make the process of going through the tickets easier. Tickets can even be filtered, sorted, and color-coded based on priority/status/category. The dashboard also shows a view of ticket trends, SLA (Service Level Agreement) breaches, and team performance metrics. These features all make it easier for the support technicians to manage their tickets efficiently. 9/10.

Management: FreshService supports multiple ways to create tickets, including email, a self-service portal, a text chat, and even automated tools. Tickets are auto assigned based on priority, category, or pre-set rules. On top of basic ticket management, FreshService has built-in asset management, problem management, and changelog management, making it a helpful tool for IT teams handling busy environments. 9/10.

Automation: FreshService does best in automation, providing various complete workflow automation tools. Tickets can be auto categorized, assigned, escalated, or even updated based on parameters such as keywords, user type, or SLA (Service Level Agreement) violations. It even has “service catalog” automation, which allows users to request common services (like account creation) through predetermined workflows. 10/10.

KBA: FreshService includes a built-in KBA that allows its users to create articles, FAQs, and solutions directly linked to the service portal. Users are wholly encouraged to search for solutions before submitting a ticket, which helps prevent repetitive tickets. However, FreshService does not currently offer a totally interactive flowchart like Zendesk. 8/10.

Pricing: Similarly to Zendesk, FreshService offers tiered pricing starting at approx. $19 per agent per month for the basic plan. However, FreshService’s “feature set”, especially the inclusion of IT asset management (ITAM) and incident/problem/change management even provides better value for help desk/service analyst teams. That said, it can still be pricey for very small businesses with limited IT needs. 7/10.

## Integration (Hannah B. & Kyle W.)

**FreshService** will integrate smoothly into our help desk proposal thanks to its broad ITSM capabilities and flexible integration options. FreshService offers built-in integrations with popular tools such as Windows Active Directory, Microsoft Teams, Slack (which is essentially Corporate Discord), Nagios/SolarWinds, and any asset discovery tools. By working seamlessly with these, it will enable our CSTN IT Help Desk to automatically assign/escalate tickets to higher tiers based on their asset type, and their severity. This will also ensure that configurations are automatically made. Due to the integration with Microsoft Teams and Slack, it enables the user to seamlessly swap between the two apps, which makes the work even more efficient. Lastly, end-user data is stored in the tickets to help benefit resolution times. FreshService was designed with ITIL best practices in mind (something that I, Hannah, am learning on my own accord outside of NSCC currently), which makes it a lot easier for it to integrate into our help desk without needing to change around too many of our other programs/assets.  
  
**Zendesk** offers integration methods with popular workplace software like Slack, Teams, Salesforce, QuickBooks and even social media to aid in an existing workplace picking up the software. It is also cloud-based to aid with scalability across small and large businesses alongside SSO support to integrate with an existing Active Directory library. In addition, Zendesk also provides APIs and SDKs in case the business relies on custom/proprietary software to even integrate with software it does not support directly. While convenient, I could predict this feature having a steep learning curve and may be difficult to program around a new API.

## Recommendation (Kyle W.)

Zendesk and FreshService are both powerful and useful tools, but I see each having their own use depending on the business's needs. Both are quite similar in their core functionality as a ticketing system, the slight differences in both can depend on the scope of the company. While Zendesk offers better integration features and their AI companion tool, FreshService offers more streamlined automation with many of the automation, reporting and KBA features at a fraction of the cost, with FreshService’s most expensive plan being $100 per agent/month compared to Zendesk’s $150.

For large businesses with a need for customizable reporting, workflows and KBA management, I would lean toward Zendesk, especially if budget isn’t as much of a concern. For small to medium-sized businesses, however, I would recommend FreshService, as it offers many of the core features you would expect out of a premium ticketing service at a much lower cost per agent.

## Summary (Hannah B.)

In comparing Zendesk and FreshService, we found both platforms to be good options, but FreshService is better suited for our internal IT help desk for CSTN. It has strong automation capabilities, along with IT asset management tools, and competitive pricing to help give it the edge. By going with FreshService, we ensure that our help desk team has a platform that can not only handle traditional ticketing, but also support the IT service “lifecycle”, from tracking the company's assets, to change management and automation.

FreshService's capabilities to streamline our workflows, integrate with existing systems, and empower end-users with a helpful KBA area helps with the main goal of the IT service desk, which is to minimize downtime and to ensure all of the employees’ IT needs are met. For all of these reasons, FreshService is the best choice for our CSTN IT Help Desk moving forward.

# Bibliography

<https://www.zluri.com/blog/freshservice-vs-zendesk>

<https://www.getguru.com/reference/freshservice-vs-zendesk>ignore that it is not letting me delete it

**There are no sources in the current document.**

## Work Log

**Hannah**

|  |  |  |
| --- | --- | --- |
| Feb 28 | Researching | 6pm-8pm |
| Mar 1 | Writing documentation, mostly the parts about FreshService | 8pm-10pm |
| Mar 7 | Completing the integration, recommendation, and summary sections. | 1pm-3pm; 9pm-11pm |
| Mar 9 | Formatting, and final submission | 7:30pm-8 |

**Jack**

|  |  |  |
| --- | --- | --- |
| Feb 26 | Researching | 8:30AM-10:30AM |
| March 3rd | Researching FreshService | 10:30AM-12:30AM |

**Kyle**

|  |  |  |
| --- | --- | --- |
| Feb 26th | Researching Zendesk | 8:30am-10:30am |
| March 3rd | Creating Zendesk portion, creating spreadsheet (scoring Zendesk section), designing and planning criteria section | 10:30am-12:30am |
| March 8th | Introduction section, Zendesk portion of Integration, Recommendation section completed, formatting/spell checking for final submission | 1:30pm – 2:30pm |

## Team Rubric and Evaluation

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 0 | 1 | 2 | 3 | 4 |
| Work Quality | No work has been submitted to determine quality. | There is little effort put into the work. | Work requires corrections to be approved. | Work requires some attention and adjustments, is “okay”. | No corrections or attention was needed, work is high quality! |
| Attendance | No attendance, or any communication. | An increase in attendance is desired. | Attends but lacks participation in meetings. | Attends most of the time, with some participation. | Attends every class with full participation. |
| Initiative | No initiative has been shown | Requires aid from all team members to complete work/all tasks completed with supervision. | Required push from the Team Lead, some tasks completed under supervision. | Required no Team Lead, most tasks were done without any supervision. | Help from Team Lead was not needed, all tasks were completed with ease! |
| Deadlines | Nothing submitted to Team Lead | Little to no communication, and very little work submitted to team lead on-time. | Some documents submitted with minimal communication to the team. | Some documents were submitted with proper communication to the team. | All documentation submitted to the Team Lead in a timely manner. |
| Collaboration | No collaboration or effort to work with other group members. | Minimal collaboration with team, needs improvement. | Some collaboration, but inconsistent. | Good collaboration with team, consistent contributions to the teams’ success. | Good collaboration and teamwork goes above-and-beyond. |
| Participation | No participation in discussions, meetings, or assignments. | Minimal participation, little effort, poor engagement. | Moderate participation, occasional effort but inconsistent engagement. | Active participation in most discussions and shows good engagement. | Consistently active and engaged with discussions, meetings, etc. |

### Jack

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Work Quality | Attendance | Initiative | Deadlines | Collaboration | Participation |
| Hannah | 4 | 3 | 4 | 4 | 4 | 4 |
| Jack | 3 | 3 | 2 | 3 | 3 | 3 |
| Kyle | 4 | 3 | 4 | 4 | 4 | 4 |

### Kyle

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Work Quality | Attendance | Initiative | Deadlines | Collaboration | Participation |
| Hannah | 4 | 3 | 3 | 4 | 3 | 3 |
| Jack | 0 | 4 | 2 | 0 | 0 | 1 |
| Kyle | 4 | 4 | 3 | 4 | 4 | 4 |

Hannah

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Work Quality | Attendance | Initiative | Deadlines | Collaboration | Participation |
| Hannah | 4 | 3 | 4 | 4 | 4 | 4 |
| Jack | 3 | 4 | 2 | 4 | 0 | 0 |
| Kyle | 4 | 4 | 4 | 4 | 4 | 4 |