**Proposal Template**

**CSTN Web Designs**

**CSTN Web Designs**

**02/04/2025**

[Introduction 2](#_Toc322117563)

[Executive Summary 2](#_Toc2072005537)

[Contact 2](#_Toc1633549309)

[Problem Definition 2](#_Toc1285164433)

[Project Overview 2](#_Toc652839044)

[Implementation Strategy 3](#_Toc830785734)

[Cost Analysis 3](#_Toc418306930)

[Integration 3](#_Toc1904935235)

[Benefits 3](#_Toc1960359846)

[Justification for Selection 3](#_Toc115289638)

[Evaluation Criteria 3](#_Toc1731010674)

[Proposal Milestones 3](#_Toc373489730)

[Roles and Responsibilities 3](#_Toc1092905040)

[Approvals 3](#_Toc2125863630)

[Citations 3](#_Toc1911015415)

# Introduction

CSTN Web Designs is proposing the implementation of a modern IT Help Desk system to improve IT support operations. After enough evaluation, FreshService has been selected as the optimal solution based on its automation, scalability, and integration powers. This proposal outlines the problem, objectives, phases of implementation, staffing and hardware requirements, budgeting, milestones, and performance evaluation/approval criteria.

# Executive Summary

CSTN Web Design’s current IT support system is inefficient, lacks a centralized workflow, and fails to deliver fast, automated service to staff. After evaluating various options, FreshService was chosen due to its balance of cost, features, and ease of use. This proposal details the strategy for deploying FreshService, outlines key milestones, and provides budget, staffing, and timeline estimates. When complete, this implementation will improve user satisfaction, streamline issue resolution, and support CSTN Web Design’s long-term growth.

# Problem Definition

CSTN Web Design’s current IT support infrastructure is inefficient, leading to prolonged response times, inconsistent issue tracking, and user dissatisfaction. A lack of automation further exacerbates these issues. Implementing a modern ticketing system will resolve these challenges by centralizing IT support operations, introducing automation, and ensuring better reporting.

# Project Overview

· Resolve hardware, software, and network issues in a timely manner.

· Implement a centralized help-desk system to streamline problem management.

· Maintain and improve the efficiency of IT systems to minimize downtime.

· Train staff in basic IT troubleshooting.

* Ensure the IT systems will be successful long-term.

**Project Scope**

* **Included Services**

o Email issues

o Software installation

o Password resets

o Hardware troubleshooting

· **Exclusions**

o Personal device support

o Third-Party integrated software issues

**Resources**

**Number of staff =** 80

**Number of computers =** 20 (Dell)

**Number of laptops =** 60 (Dell)

**Number of tablets =** 35 (Dell)

**Number of printers =** 5 (Kyocera FS 2020)

**Required Business Software =**

Microsoft Office

Adobe Creative Suite

Billing Software

# Implementation Strategy

# Cost Analysis

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

**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.

# Benefits

What will Benefit us with FreshService is the fact that it’s easy to use and will improve the workflow of the company

# Justification for Selection

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.

# Evaluation Criteria

* 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.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | 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 |

(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**

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**  
 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.

# Proposal Milestones

# Phase 1 (1 Month): Planning and Design

* **Finalizing Software, Hardware, and Confirm Budget**

**Phase 2 (1 Month): Hardware Installation and setup**

* **Setting up workstations for staff**

**Phase 3 (2 Months): Software implementation/imaging and Networking**

* **Installing/imaging Help Desk software, configuration of network**

**Phase 4 (2 Month): Staffing and training**

* **Hiring and training staff in how to use software, tools, etc.**

**Phase 5 (1 Month): Testing and Execution**

* **Testing workstations and software.**

### **Help Desk Workflow and Escalation Procedures**

A screenshot of a diagram

Description automatically generated  
  
-Incoming tickets are auto-triaged based on keywords, severity, and request type.  
-SLAs: **Low Priority**: 48-hour response **Medium**: 24 hours **High**: 8 hours or less  
-Tickets unresolved within SLA auto-escalate.

### **Hardware Requirements** -5 new support agent workstations (minimum i5, 16GB RAM) -VoIP-enabled headsets and dual monitors for multitasking -UPS battery backup and secure network connections

### **Ticketing System: Weighted Evaluation**

|  |  |  |  |
| --- | --- | --- | --- |
| **Criteria** | **Weight** | **FreshService** | **Zendesk** |
| Cost | 25% | 5 | 3 |
| Ease of Use | 20% | 5 | 4 |
| Automation Features | 15% | 5 | 4 |
| Integration | 20% | 4 | 5 |
| Reporting & Analytics | 10% | 4 | 5 |
| Support Quality | 10% | 5 | 5 |
| **Total** |  | **4.65** | **4.25** |

FreshService was selected for its superior cost-to-value ratio.

### **Staffing Requirements**

* **5 Help Desk Agents** for Tier 1/2 support
* **1 Help Desk Manager** to oversee operations and reporting
* **1 Technical Specialist (Tier 3)** for escalations
* Optional: Outsourced after-hours Tier 1 support via managed services

### **Budgeting**

Staffing: Salaries for the 3 helpdesk staff

* one Level 2 Technician (for advanced troubleshooting and system maintenance). Paid at $60,000/yr
* two Level 1 Technicians (for basic troubleshooting, ticket resolution, and user assistance). Paid at $42,500/yr ea.
* Competitive salaries offered

Hardware: three setups with 3 monitors, a keyboard, mouse, headset, backup power supply, and any other necessary peripherals.

* Three Workstations ($1,500/ea)
* Nine Monitors ($250/ea)
* Peripheral Devices (Headset, Keyboards, Mice, etc) ($5,000)
* Backup Power Supplies ($4,000)
* Desks and Chairs ($4,000)
* Software: Zendesk subscription, Microsoft 365 Subscription, AnyDesk subscription (for remote desktop access), SolarWinds for inventory management and resource allocation. (Zendesk $10,000/yr) (Microsoft 365 $8,000/yr) (AnyDesk $5,000/yr) (SolarWinds $8,000/yr

**Contingency Fund**: $14,000 for emergency IT failures or security issues.

### **Timelines**

|  |  |  |
| --- | --- | --- |
| **Phase** | **Task** | **Projected Completion Date** |
| Planning | Finalizing the budgets for the hardware, software, and determining what is needed. | Feb 15 |
| Hardware Setup | Install and configure workstations | Feb 21, 2025 |
| Software Installations | Release the Ticketing System and any Security Software | Mar 1, 2025 |
| Staffing | Hire helpdesk technicians | Mar 14, 2025 |
| Training | Protocol training for helpdesk | Mar 21, 2025 |
| Go-Live and Testing | Final system testing and deployment! | Mar 31, 2025 |
| General Upkeep | Ongoing support for 1 year regarding the setup of the help desk. | Mar, 2026 |

### **Additional Considerations**

* **Accessibility**: Help desk portal will support screen readers
* **Disaster Recovery**: FreshService data is cloud-based with built-in redundancy
* **Feedback Integration**: Real-time user ratings per ticket resolution

# Roles and Responsibilities

|  |  |
| --- | --- |
| **Role** | **Responsibility** |
| **Project Manager** | Oversees delivery and communication |
| **IT Lead** | Configures FreshService and integrations |
| **Support Agents (Tier 1 and 2)** | Respond to and resolve tickets |
| **Trainer** | Conducts onboarding for users |
| **Management** | Provides approvals and strategic input |

# Approvals

# Citations