

# Support Help Desk Evaluation and Configuration

## Blackbaud Enterprise

This offering evaluates and configures systems for customers who will maintain their own first tier Blackbaud Application Help Desk and will rely on Blackbaud to be their second tier Support for Escalations and more complex software issues.

### AGENDA

#### Evaluate Organization (1 - 2 Days)

Blackbaud will perform a gap analysis to evaluate your current help desk work flow and identify any employee needs for your success in supporting your Blackbaud solution.

- Occurs early in implementation (before design)
- Delivered on-site or via conference call\remote session
- A questionnaire about your current organizational processes will be sent 2 weeks prior to the evaluation call. Some of the areas we will inquire about:
  - Help desk
    - Is there a system in place for issue tracking/management?
    - Define the personnel skills of current staff.
    - Is there a current internal escalation process?
    - Is there a central location for internal knowledge sharing?
    - Is there on-going training in place?
  - Hierarchy
    - Organizational charts

#### Pre Go-live Health Status (2 - 3 Days)

At this juncture, you will have defined your named contacts that will represent your first tier support desk and are prepared for practice runs during user acceptance testing (UAT)

- Should occur after training but before UAT
- This will occur after product training but before UAT
  - Certification completion
    - Troubleshooting the application
    - Escalation procedures
    - Blackbaud website usage (roles, case central, etc.)
    - Managing help files
  - Complete Client Information Index
    - Best practice documentation
    - Shared living documents that define named contacts and location of documents (scope of support, maintenance terms & conditions, functional design specs, etc.)

#### Go-live (5 Days)

Now that the exciting time of actually using the system has arrived, Blackbaud will be onsite acting as a side-by-side resource to assist your help desk with troubleshooting and escalation of cases until you are comfortable.

- One week on-site at “go live”



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