



Pre-work.

Understand your current state and goals. Skipping this step could derail progress later.



Kickoff.

Informed by the Level 1 Assessment with the goal to make your help desk perform better every day.



Knowledge transfer and relationship building.

Continue learning (it really never stops) and build trust as we begin to manage a small part of your team's work.



Technical design and preparedness.

Get the right tools and access so analysts can provide a positive user experience.



Training.

Complete hands-on training like a dress rehearsal.



Reporting.

Touchpoint calls and operations reviews - all with continual improvement in mind.

7 Steps to Build a Clinical Service Desk Partnership



Optimizing.

Revisit details of our services and adjust for ongoing improvement.