

## Help Desk Buyer's Scoring Matrix

Use this scoring matrix to compare help desk platforms based on the criteria that matter most to your team. Score each tool on a scale of 1–5 for every criterion, then total the scores to support your final decision.

| Criteria                          | Description                                            | Tool A Score (1–5) | Tool B Score (1–5) | Notes |
|-----------------------------------|--------------------------------------------------------|--------------------|--------------------|-------|
| Compatibility with Existing Tools | Integrates with email, CRM, chat, and internal systems |                    |                    |       |
| Ease of Use and Onboarding        | Simple setup, intuitive UI, minimal training required  |                    |                    |       |
| Workflow Fit                      | Supports routing, SLAs, escalations, and collaboration |                    |                    |       |
| Automation and AI Capabilities    | Reduces manual work and improves response speed        |                    |                    |       |
| Scalability                       | Handles growth in volume, users, and channels          |                    |                    |       |
| Security and Compliance           | Meets compliance and data security requirements        |                    |                    |       |

|                                |                                                                |  |  |  |
|--------------------------------|----------------------------------------------------------------|--|--|--|
| Vendor Support<br>and Training | Quality of<br>vendor support<br>and<br>onboarding<br>resources |  |  |  |
| Trial or Demo<br>Availability  | Ability to test<br>workflows<br>before<br>committing           |  |  |  |
| Pricing and<br>Transparency    | Clear,<br>predictable<br>pricing without<br>hidden costs       |  |  |  |