

Sample Help Desk Workflow Templates

1. General Support Template

Stage	Action	Owner	SLA Target
Ticket Creation	Customer submits request	Customer/System	Immediate
Categorization & Prioritization	Classify ticket by type and urgency	Support Agent	15 mins
Routing & Assignment	Assign to appropriate team	System/Lead	15 mins
Investigation & Resolution	Diagnose and resolve issue	Assigned Agent	Based on priority
Escalation (if required)	Escalate unresolved issues	Team Lead/Specialist	Before SLA breach
Closure	Confirm resolution and close ticket	Assigned Agent	Within SLA
Feedback Collection	Send CSAT survey	System	After closure

2. Employee Onboarding Workflow Template

Step	Action	Owner
1	Submit onboarding request	HR
2	Create onboarding ticket	Help Desk
3	Provision user account	IT
4	Assign software licenses	IT
5	Configure device	IT
6	Notify employee	HR/IT
7	Close request	Help Desk

3. Customer Escalation Workflow Template

Step	Action	Owner
1	Customer submits support request	Customer
2	Ticket created and categorized	Help Desk
3	Issue assigned to Tier 1 support	Help Desk
4	Initial troubleshooting performed	Tier 1 Agent
5	Resolution successful?	Tier 1 Agent
6	Escalate unresolved issue	Tier 2/Tier 3 Team
7	Resolve and communicate outcome	Specialist Team
8	Confirm resolution with customer	Help Desk
9	Close ticket and collect feedback	Help Desk

4. Incident Management Workflow Template

Step	Action	Owner
1	Incident reported	Customer
2	Incident ticket created	Help Desk
3	Incident severity assessed	Support Team
4	Incident assigned to response team	Team Lead
5	Investigation and root-cause analysis	Technical Team
6	Resolution implemented	Technical Team
7	Incident status communicated	Help Desk
8	Post-incident review conducted	Management
9	Ticket closed and documented	Help Desk

5. Service Request Workflow Template

Step	Action	Owner
1	Service request submitted	Customer
2	Request reviewed and categorized	Help Desk
3	Approval required?	Manager
4	Request fulfilled	Assigned Team
5	Completion validated	Help Desk
6	Requester notified	Help Desk
7	Feedback collected	Customer
8	Ticket closed	Help Desk