

[organization logo]

[organization name]

Comment [BV1]: All fields in this document marked by square brackets [] must be filled in.

BUSINESS RELATIONSHIP MANAGEMENT PROCESS

Code:	
Version:	
Date of version:	
Created by:	
Approved by:	
Confidentiality level:	

Comment [BV2]: The document coding system should be in line with the organization's existing system for document coding; in case such a system is not in place, this line may be deleted.

Change history

Date	Version	Created by	Description of change
xx/xx/2013	0.1	Branimir Valentic	Basic document template

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1. Purpose, scope and users

The aim of this document is to define the purpose, scope, principles and activities of the Business Relationship Management process.

This document is applied to the entire IT Service Management (ITSM) organization.

Users of this document are all employees of [organization name], as well as all external parties who have a role in ITSM.

Comment [BV3]: *OPTION*****
Replace this with "SMS" if you are implementing ISO 20000.

Comment [BV4]: *OPTION*****
Replace this with "SMS" if you are implementing ISO 20000.

2. Reference documents

- Service Portfolio Management Process
- Design Coordination Process
- Service Level Management Process
- Strategy Management for IT Services Process
- Design Coordination Process
- Strategy Management for IT Services Process
- Change Management Process
- ISO/IEC 20000-1:2011, clauses 7.1.

Comment [BV5]: *OPTION*****
Delete this if you are implementing ISO 20000 and not ITIL.

Comment [BV6]: *OPTION*****
Delete this if you are implementing ISO 20000 and not ITIL.

Comment [BV7]: *OPTION*****
Delete this if you are implementing ITIL and not ISO 20000.

3. Policy

Business Relationship Management is the process that provides a link between the customer and [organization name] on a strategic and tactical level.

[organization name] uses Business Relationship Management (BRM) to:

- Establish business relationship with customer
- Understand customer's needs and value perception
- Establish and formulate business requirements for new or changed services
- Ensure that organization meet, meet customer's business requirements
- Interfere when there is a conflicting situation on an operational level
- Serve as a formal escalation process

Comment [BV8]: These are common goals of BRM. Add your own goals or delete redundant.

3.1 Customer Portfolio

[role description] is responsible to ~~to~~ and maintain the customer portfolio to manage information about customers; see Customer Portfolio in Appendix.

The customer agreement portfolio is defined and maintained in the Service Level Management Process (see Customer Agreement Portfolio in Appendix of Service Level Management Process).

[tool name] is used to host information about customer portfolios.

Comment [BV9]: Enter tool name or Spreadsheet name here.

[Business Relationship Manager] is responsible to define mandatory content of the portfolio.

3.2 Customer satisfaction

Customer satisfaction with existing services and [organization name]'s performance is the primary focus of the Business Relationship Management process. [Business Relationship Manager] is responsible for ensuring that the customer satisfaction survey (see Customer Satisfaction Survey in Appendix) is carried out once a year, with the results recorded and analyzed. [Business Relationship Manager] manages all issues that arise from the survey and identifies opportunities for improvement documented in Service Performance Review Report (see Appendix).

Comment [BV10]: Change if needed.

[Business Relationship Management] reports the findings of the survey and related actions to [role description]. [Business Relationship Manager] is responsible to carry out actions to resolve all issues that arise from the customer satisfaction survey and, when resolved, closes the complaint.

Comment [BV11]: e.g. CIO, but could be also manager role on customer's side.

3.3 Service requirements

[Business Relationship Manager] ensures that the customer's requirements (see Service Level Requirements in Appendix of Service Level Management Process) are clarified, evaluated, documented and communicated toward:

- Service Portfolio Management process
- Change Coordination process
- Service Level Management process
- Strategy Management for IT Services process

Comment [BV12]: *OPTION*****
Delete this if you are implementing ISO 20000 and not ITIL.

3.4 Tool integration

[tool name] is a tool that supports the Business Relationship Management process and activities. [role description] is responsible to manage tool usage and integration with other processes and their supporting tools.

Comment [BV13]: The Business Relationship Management process situation, i.e. delete if some of the processes does-not exist.

Comment [BV14]: *OPTION*****
Delete this if you are implementing ISO 20000 and not ITIL.

Comment [BV15]: *OPTION*****
Delete this chapter if you are implementing ISO 20000 and not ITIL.

Comment [BV16]: If no tool is used, enter document names which are used to generate reports (e.g. Service Performance Review Report, Customer Satisfaction Survey Report, Service Level Management Report, etc.). If individual reports are stored.

Comment [BV17]: Delete if integrated SW solution is used (e.g. BRM and other processes are using same tool).

4. Process

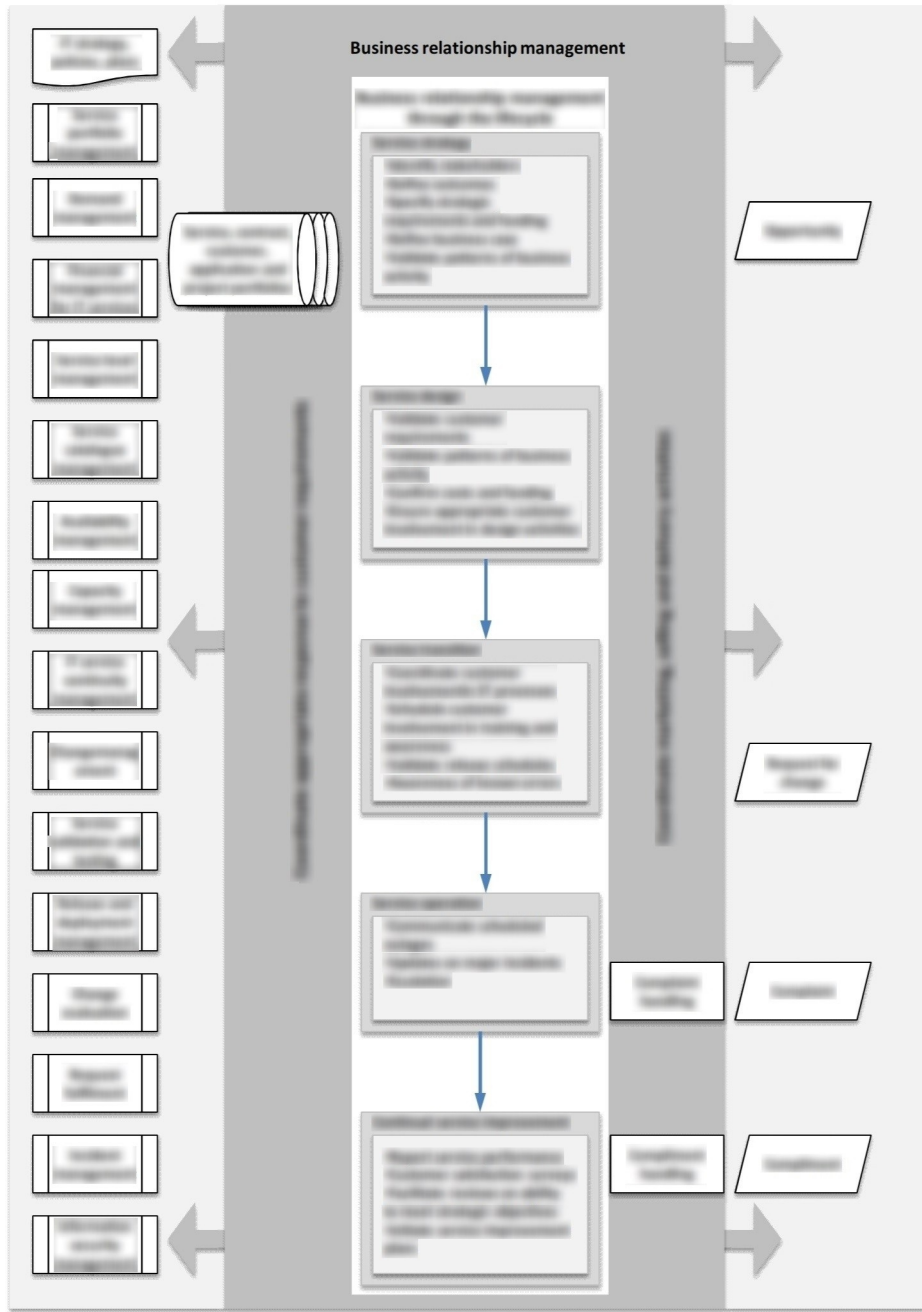


Figure: Business Relationship Management process activities

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Comment [BV18]: Double-click to edit figure and adapt to your own requirements.

Comment [BV19]: *OPTION*****
Delete this figure if you are implementing ISO20000 and not ITIL.

4.1 Process initiation

[Business Relationship Manager] is responsible for ensuring that all opportunities, requests, ~~complaints and commitments are tracked and documented~~ (see Customer Portfolio in Appendix).

Comment [BV20]: Change if needed.

4.2 Requirement initiation by customer

The customer's requirements are identified and communicated using the following:

4.2.1 Opportunity

[Business Relationship Manager] is responsible to document and pass along to ~~other IT Service Management~~ ~~processes of opportunities identified by the customer or as a result~~ of a review meeting with the customer (see Service Performance Review Report in Appendix). Review meetings are organized by [Business Relationship Manager] [once a quarter] ~~and reports are created, see~~ Service Performance Review Report in Appendix.

Comment [BV21]: *OPTION*****
Replace this with "SMS" if you are implementing ISO 20000.

[Business Relationship Manager] ensures that:

- ~~Customer's business environment is understood~~
- ~~Further activities with opportunities are monitored~~
- ~~Activities between several processes are coordinated~~
- It serves as an escalation point if needed

Comment [BV22]: *OPTION*****
Delete this if you are implementing ITIL and not ISO 20000.

[Business Relationship Manager] ~~meets with the customer (once a month), reviews the services~~ that the customer uses and creates a report; see Service Performance Review in Appendix.

4.2.2 Request for change

[Business Relationship Manager] ~~ensures that the customer is assisted in completing~~ and submitting a Request for Change (see Request for Change and Change Record in Appendix of Change Management Process). After the Request for Change is submitted, [Business Relationship Manager]:

- Represents the customer in Change Advisory Board (CAB)
- ~~Monitors the change fulfillment throughout Change Management process~~
- Provide status updates to the customer
- ~~Requests additional information from the customer~~
- Coordinates any other activities that the customer is involved in.
- In cases of Service Level Agreement (SLA) changes (see Service Level Agreement and Customer Agreement Portfolio in Appendices of Service Level Management Process)

~~Business Relationship Manager coordinates all activities with Service Level Manager for~~ that particular customer.

Comment [BV23]: *OPTION*****
Delete this if you are implementing ITIL and not ISO 20000.

4.2.3 Other requests

[Business Relationship Manager] is ~~responsible for ensuring that all customer requests are~~ documented (see Service Request Form and Service Request Record in Appendix of Request Fulfillment Process), ~~processed and communicated~~. The Request Fulfillment process is used to ~~process such requests~~.

Comment [BV24]: Delete if Request fulfillment process is not in place. If so, use Appendix 3 of the Request Fulfillment process to document customer requests.

4.2.4 Complaint

[Business Relationship Manager] is responsible to:

[organization name]

- Define service complaint (see Customer Complaint Report in Appendix) with the customer and ensure that it is entered in the customer's Service Level Agreement (this activity is the responsibility of the customer's Service Level Manager)
- Record, investigate, act upon, report (see Customer Complaint Report in Appendix) and close complaints from the customer regarding services or relationship with service provider
- Review outstanding complaints and escalate, if needed
 - Include own organization in [role description]
 - toward customers to [role description]
- Analyze trends
- Provide the customer with feedback
- Put complaints on the agenda of the review meeting

Comment [BV25]: *OPTION*****
Delete this if you are implementing ITIL and not ISO 20000.

Comment [BV26]: On customer side.

Comment [BV27]: Feedback should be in written form and should contain, e.g.

- Thank the customer for taking effort to report the situation
- Apologize for the inconvenience
- Make brief summary so that it is clear that everything is correctly noted. Note if any actions have been taken.

4.2.5 Compliments

[Business Relationship Manager] ensures that all compliments (see Customer Compliment Report in Appendix) are documented, evaluated and followed through.

4.3 Requirement initiation by the service provider

Some process activities (e.g. SLA revision) value the customer's feedback. In such cases, [Business Relationship Manager] is responsible to gain feedback from the customer.

Encourage customer to contact service provider and Business Relationship Manager is if complaint has not been resolved successfully.

Comment [BV28]: e.g. Business Relationship Manager is central point of contact for customer so he can be directly responsible for customer issues. The customer has all services that will have complaints, but complaints must be handled by Business Relationship Manager and Business Relationship Manager is responsible for handling the through Business relationship process.

5. Roles and responsibilities

5.1. Business Relationship Manager

[role description] assigns the Business Relationship Manager role.

Responsibilities of Business Relationship Manager:

- Overall responsibility for carrying out activities within the scope of Business Relationship Management
- Coordinates activities with other Service Management roles and processes
- Plans and manages tools needed to support Business Relationship Management process
- Responsible for reporting and managing information
- Develops and maintains Business Relationship Management process and procedures
- Identifies customer needs and ensures that [organization name] is able to meet those needs
- Ensures that customer expectations are not higher than what they are willing to pay for
- Ensures high level of customer satisfaction
- Establishes and maintains communication and constructive relationships with customers
- Understands customers and their business needs
- Ensures that [organization name] meets the customer's existing and future business needs
- Serves as a mediator for conflicts
- Defines minimum level for particular customers in areas of:
 - Customer satisfaction survey
 - Customer complaints

Comment [BV29]: e.g. compliments can indicate if appropriate level of service is being delivered or delivered with much higher level than needed. Feedback should always be provided. E.g. content of the feedback:

- Thank the customer
- Apologize for the inconvenience
- Make brief summary about the complaint and ensure that the process is completed

• Invite customer to contact service provider with further complaints and compliments.

6. Measurement and metrics

6.1. Measurement

[role description] is responsible to produce reports.

Reports are sent to the Service Level Manager on a monthly basis.

[role description] is responsible that:

- reports are produced monthly, with quarterly and yearly summaries
- reports are evaluated
- measures for improvement are defined

6.2. Metrics

Metrics reports are produced monthly, with quarterly and yearly summaries. Metrics to be reported:

- List of opportunities, customer requirements and/or complaints, complaints. Breakdown by categories.
- Statistics of customer feedback on resolved incidents and service requests
- Report and analysis of customer satisfaction survey

6.3. Critical Success Factors (CSF) and Key Performance Indicators (KPI)

[role description] is responsible to define CSFs and respective KPIs. Achievements against KPIs are monitored and evaluated by [role description].

Critical Success Factor	Key Performance Indicator
The competence to document and understand customer requirements of services, i.e. the business outcomes they wish to achieve.	Business outcomes and customer requirements are documented and agreed off by the customer as input into other service management processes.
The competence to measure customer satisfaction levels, as well as to know when action to take with the results.	Customer satisfaction levels are consistently high and are used as feedback into service portfolio management and strategic management for IT services. Any score lower than is defined level results in an investigation performed by [Business Relationship Manager] into the cause, as well as corrective action.
Business relationship management is able to measure that the service provider is meeting the business needs of the customer.	Results of customer satisfaction survey reveal that service provider is rated above [defined minimum level].

Comment [BV30]: Or similar role. Change if needed.

Comment [BV31]: Change if needed.

Comment [BV32]: Example: Business Relationship Manager, Continual Service Improvement Manager

Comment [BV33]: Final list depends on tool's possibilities, i.e. requirements.

Comment [BV34]: If such functionality is available, use Service Desk.

Comment [BV36]: Example of CSFs and KPIs. Each organization must develop its own CSFs and KPIs. CSFs and KPIs are used as feedback into service portfolio management and strategic management for IT services. Any score lower than is defined level results in an investigation performed by [Business Relationship Manager] into the cause, as well as corrective action.

Comment [BV35]: Involving Service Level Management, Problem Management, Capacity Management, etc.

7. Managing records kept on the basis of this document

Record name	Storage location	Person responsible for	Controls for record protection	Retention time

		storage		
Customer portfolio (in electronic form)	[tool name]	[job title]	Business Relationship Manager has the right to add to/change the record.	Records are kept for [...].
Complaint report	[tool name]	[job title]	Business Relationship Manager	Reports are kept for [...].
Compliment report	[tool name]	[job title]	Business Relationship Manager	Reports are kept for [...].
Service Performance review report	[tool name]	[job title]	Business Relationship Manager	Reports are kept for [...].
Customer Satisfaction survey	[tool name]	[job title]	Business Relationship Manager	Reports are kept for [...].

- Comment [BV37]:** Overall responsibility for BRM. Usually Business Relationship Manager.
- Comment [BV38]:** Example: for current year (YTD) – in [tool name], otherwise archived in [tool name or place of archive].
- Comment [BV39]:** Overall responsibility for Records. Usually Business Relationship Manager.
- Comment [BV40]:** Change if needed.
- Comment [BV41]:** Example: for current year (YTD) – in [tool name], otherwise archived in [tool name or place of archive].
- Comment [BV42]:** Overall responsibility for Records. Usually Business Relationship Manager.
- Comment [BV43]:** Change if needed.
- Comment [BV44]:** Example: for current year (YTD) – in [tool name], otherwise archived in [tool name or place of archive].
- Comment [BV45]:** Overall responsibility for Records. Usually Business Relationship Manager.
- Comment [BV46]:** Change if needed.
- Comment [BV47]:** Example: for current year (YTD) – in [tool name], otherwise archived in [tool name or place of archive].
- Comment [BV48]:** Overall responsibility for Records. Usually Business Relationship Manager.
- Comment [BV49]:** Change if needed.
- Comment [BV50]:** Example: for current year (YTD) – in [tool name], otherwise archived in [tool name or place of archive].
- Comment [BV51]:** This is only a recommendation; adjust frequency as appropriate.

8. Validity and document management

This document is valid as of [date].

Owner of this document is [job title], who must *(check and, if necessary, update the document at least once a year.*

9. Appendices

- Appendix 1: Customer Portfolio
- Appendix 2: Customer Complaint Report
- Appendix 3: Customer Satisfaction Survey
- Appendix 4: Service Performance Review Report
- Appendix 5: Customer Compliment Report

[job title]

[name]

[organization name]

[redacted]

[signature]

Comment [BV52]: Only necessary if the Procedure for Document Control prescribes that paper documents must be signed.