# BUSINESS RELATIONSHIP MANAGEMENT PROCESS

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**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

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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.

2. Reference documents

- Service Portfolio Management Process
- Design Coordination Process
- Service Level Management Process
- Strategy Management for IT Services Process
- Change Management Process


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
- Identify customer needs and ulterior motives
- Establish and formulate business requirements for new or changed services
- Ensure that organization works towards customer business requirements
- Interfere when there is a conflicting situation on an operational level
- Serve as a formal escalation process

3.1 Customer Portfolio

[role description] is responsible to fill 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 portfolio.

[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).

[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.

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
- [Other 
- Strategy Management for IT Services process

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.

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.

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4.1 Process initiation

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

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 Service Performance Review Report in Appendix.

[Business Relationship Manager] ensures that:

- Customer’s business environment is understood
- Further activities with opportunities are recommended
- Actions are taken as appropriate
- It serves as an escalation point if needed

[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 involved 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
- Provides 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.

4.2.3 Other requests

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

4.2.4 Complaint

[Business Relationship Manager] is responsible to:

Comment [BV20]: Change if needed.

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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.
4.2.5 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

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
- Devises and implements strategies for other service management tools 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 high level of customer satisfaction
- Establishes and maintains communication and constructive relationships with customers
- Ensures that [organization name] meets the customer’s existing and future business needs
- Defines minimum level for particular customers in areas of:
  - Customer satisfaction survey
  - Customer complaints

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.

Comment [BV28]: e.g. Business Relationship Manager is central point of contact for customer so he can be directly
through Business relationship process.

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:

- 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:
- *帥改 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].

<table>
<thead>
<tr>
<th>Critical Success Factor</th>
<th>Key Performance Indicator</th>
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<tr>
<td>The competence to document and understand customer requirements and the business outcomes they wish to achieve.</td>
<td>Business outcomes and customer requirements are monitored and assessed as input into other service management processes.</td>
</tr>
<tr>
<td>The competence to measure customer satisfaction and the action to take with the results.</td>
<td>Customer satisfaction levels are consistently high in achieving the CSFs. Survey results are shared with the team and then [Business Relationship Manager] into the cause, as well as corrective action.</td>
</tr>
<tr>
<td>Business relationship management is able to ensure that the customer's business needs are balanced against the business needs of the customer.</td>
<td>Results of customer satisfaction survey reveal minimum level. [Defined by the business needs of the customer]</td>
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7. Managing records kept on the basis of this document

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ver [version] from [date]  
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| 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 [...]. |

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]