 REQUEST FULFILLMENT PROCESS

<table>
<thead>
<tr>
<th>Code:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Version:</td>
<td></td>
</tr>
<tr>
<td>Date of version:</td>
<td></td>
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<tr>
<td>Created by:</td>
<td></td>
</tr>
<tr>
<td>Approved by:</td>
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<tr>
<td>Confidentiality level:</td>
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</tr>
</tbody>
</table>

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

Comment [BV2]: If you want to find out more about Event Management, see http://www.20000academy.com/Blog/August-2013/HTML-Request-Fulfillment-a-quick-win-for-customer-satisfaction

Comment [BV3]: 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.

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Change history

<table>
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<th>Date</th>
<th>Version</th>
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<td>xx/xx/2013</td>
<td>0.1</td>
<td>Branimir Valentic</td>
<td>Basic document template</td>
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</table>

Table of contents

1. PURPOSE, SCOPE AND USERS ............................................................................................................. 3
2. REFERENCE DOCUMENTS .................................................................................................................. 3
3. POLICY ........................................................................................................................................... 4
   3.1. OWNERSHIP AND COMMUNICATION ................................................................................................. 4
   3.2. SERVICE REQUEST RECORDS .......................................................................................................... 4
   3.3. REOPENING OF SERVICE REQUESTS .............................................................................................. 4
   3.4. ESCALATION ................................................................................................................................ 4
4. PROCESS ............................................................................................................................................ 4
   4.1. RECEIVE REQUEST ......................................................................................................................... 4
   4.2. REQUEST LOGGING AND VALIDATION .............................................................................................. 6
   4.3. REQUEST CATEGORIZATION .......................................................................................................... 6
   4.4. REQUEST PRIORITIZATION ............................................................................................................. 7
   4.5. REQUEST AUTHORIZATION .......................................................................................................... 7
   4.6. REQUEST REVIEW ......................................................................................................................... 8
   4.7. REQUEST EXECUTION .................................................................................................................... 8
   4.8. REQUEST CLOSURE ....................................................................................................................... 8
5. ROLES AND RESPONSIBILITIES ........................................................................................................... 9
   5.1. REQUEST FULFILLMENT MANAGER ................................................................................................. 9
   5.2. REQUEST FULFILLMENT ANALYST ............................................................................................... 9
6. MEASUREMENT AND METRICS ........................................................................................................ 9
   6.1. MEASUREMENT ............................................................................................................................. 9
   6.2. METRICS ...................................................................................................................................... 10
   6.3. CRITICAL SUCCESS FACTORS (CSF) AND KEY PERFORMANCE INDICATORS (KPI) ..................... 10
7. MANAGING RECORDS KEPT ON THE BASIS OF THIS DOCUMENT .................................................... 10
8. VALIDITY AND DOCUMENT MANAGEMENT .................................................................................. 11
9. APPENDICES ..................................................................................................................................... 11
1. Purpose, scope and users

The aim of this document is to define the purpose, scope, principles and activities of the Request Fulfillment 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

- Incident Management Process
- Change Management Process
- Problem Management Process
- Service Asset and Configuration Management Process
- Release and Deployment Management Process
- Service Level Management Process

3. Policy

[organization name] uses the Request Fulfillment process to manage service requests throughout their lifecycles.

The scope of request fulfillment covers [...] 

Goals of the Request Fulfillment process are:

- To provide a channel for users to:
  - Get information about service availability
  - Seek information on how to obtain services
  - Request and receive standardised services which are pre-authorized
- To source and deliver components of standard services
- To handle general information, complaints and comments

All service requests of [organization name] are managed according to this process.

3.1. Ownership and communication

[Service Desk] holds the ownership of service requests throughout their lifecycles. This includes:

- Monitoring of all activities
- Informing the customer about the progress of service request fulfillment using e-mail
- Notification due to time constraints
- Dispatch
3.2. Service request records

All service request records should be logged, controlled, coordinated, promoted and managed in a single management system. All employees of the Service Management department are obliged to enter and update all status and decisions (see Service Request Record in Appendix).

[...] is responsible to audit service requests and ensure the correct management of service requests. If escalation is necessary, [...].

The audit includes checking of the following parameters:

- All status updates are entered
- Service requests are correctly analyzed and processed
- Service requests are authorized (for service requests that require authorization)

3.3. Reopening of service requests

[role description] is responsible to define and agree on reopening criteria with the customer and enter it in the Service Level Agreement; see Service Level Agreement in Appendix of the Service Level Management Process.

Reopening of service requests can/can't be made.

The following rule applies for reopening of service requests [...].

3.4. Escalation

Service requests are escalated according to the following procedure and agreed criteria:

- [role description] informs the customer by informing [role description] when an incident reaches 30% of Target Resolution Time and if it is obvious that this cannot be met.
- [...]

[role description] is responsible for ensuring that the escalation procedure is entered into the Service Level Agreement; see Service Level Agreement in Appendix of Service Level Management Process.

4. Process

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4.1. Receive request

The Request Fulfillment process starts when a formalised service request is received. Sources of a service request are:

<table>
<thead>
<tr>
<th>Source</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web portal: [insert web or intranet address]</td>
<td></td>
</tr>
<tr>
<td>Phone:</td>
<td></td>
</tr>
<tr>
<td>o During agreed service hours: [Insert phone number in appropriate format]</td>
<td>Service Desk staff</td>
</tr>
<tr>
<td>o Outside agreed service hours: [...]</td>
<td></td>
</tr>
<tr>
<td>E-mail [...]</td>
<td>Service Request Form in Appendix (see Service Request Form in Appendix)</td>
</tr>
</tbody>
</table>

User with assigned service request logon

To resolve incidents that are consistently opened as service requests, [Role description] is responsible to review service requests and redirect them to the [Incident Management] process if needed.

4.2. Request logging and validation

Service Requests can be logged by the user in the following ways:

- Using the web portal: [Insert web or intranet address]
- E-mail [...]
- Phone:
  - During agreed service hours: [Insert phone number in appropriate format]
  - Outside agreed service hours: [...]-

  a) Request for Change – see Request for Change and Change Record in Appendix of Change Management Process

[...] logs service requests with related data.

Service Desk staff is responsible for interacting service request data in cases when a service request is opened by phone.

Mandatory data that need to be recorded are:

- Service request number – provided automatically
- Request for Change: [description]
- User name / department / location (if other than Requestor)
- Time and date: [date and time]
- Service request category – see Service Request Catalogue in Appendix
- Description

Request Fulfillment Analyst is responsible, as the service request progresses toward fulfillment, for ensuring that every action is logged so that a full history of service request fulfillment is available.

Every service request is validated by [...].

4.3. Request categorisation
During the logging phase, service requests are categorized. Service Desk staff categorizes service requests triggered by phone. Categories of service requests assigned to other media are verified by Request Fulfillment Analyst and can be re-categorized.

Categories are set in the Service Request Catalogue (see Service Request Catalogue in Appendix).

4.4. Request prioritization

[Request Fulfillment Analyst] prioritizes service requests. Priority consists of impact and urgency, two levels and is coded based on the following table:

<table>
<thead>
<tr>
<th>Impact</th>
<th>High</th>
<th>Medium</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rating</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

Resolution time of a service request depends on priority code and is calculated as follows:

<table>
<thead>
<tr>
<th>Priority Code</th>
<th>Description</th>
<th>Target</th>
<th>Resolution Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Critical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Medium</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Low</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Planned</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Impact – business impact that a service request causes:

<table>
<thead>
<tr>
<th>High</th>
<th>Medium</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>All of users are affected by fulfillment activities</td>
<td>More than 30% of users are affected by fulfillment activities</td>
<td>Less than 30% of users are affected by fulfillment activities</td>
</tr>
</tbody>
</table>

Urgency – how quickly service request must be fulfilled:

<table>
<thead>
<tr>
<th>High</th>
<th>Medium</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediacy: High</td>
<td>Medium: High</td>
<td>Low: High</td>
</tr>
<tr>
<td>Importance CI is ordered</td>
<td>Medium importance CI is ordered</td>
<td>Low importance CI is ordered</td>
</tr>
</tbody>
</table>

Change of priority – current priority can be changed by [...].

VIP treatment – priority for VIPs is [...].

4.5. Request authorization
All service requests must be authorized before fulfillment activities are taken. [Request Fulfillment Manager] is responsible to define and maintain the authorization matrix:

<table>
<thead>
<tr>
<th>Service request type</th>
<th>Authorization by</th>
</tr>
</thead>
<tbody>
<tr>
<td>General inquiries</td>
<td>Pre-authorized by [Service Level Manager]</td>
</tr>
<tr>
<td>Sourcing of components of a service</td>
<td></td>
</tr>
<tr>
<td>[role description]</td>
<td>Pre-authorized for standard change by [Change Manager]</td>
</tr>
</tbody>
</table>

[role description] returns unauthorized service requests to the requester.

4.6. Request review

[role description] performs the service request review. The outcome of a request review is the decision of a proper resources needed to fulfill the service request. The service request is then updated with the service request record.

4.7. Request execution

[Service request assignee] undertakes all necessary activities to fulfill a service request and documents all actions taken inside [tool name].

To use existing information and knowledge, [request fulfillment analyst] has access to and uses the following resources:

- Known Errors – see Known Error in Appendix of Problem Management Process
- Change Management Database (CMDB): see CMDB in Appendix of the Service Desk process
- Release report and Release plan – see Release and Deployment Planning in Appendix of the Release and Deployment Management Process

[role description] is responsible to define service request category.

[Change Manager and/or Request Fulfillment Manager] are responsible to decide which changes will be handled through the Request Fulfillment process.

[role description] is responsible to requests.

4.8. Request closure

[Service Desk] is notified about the service request closure.

[Request Fulfillment Analyst] carries out the following:

- Financial requirement check – by notifying Financial Manager about incurred costs
- [role description]
5. Roles and responsibilities

5.1. Request Fulfillment Manager

[role description] assigns the Request Fulfillment Manager role.

Responsibilities of Request Fulfillment Manager:

- Overall responsibility for carrying out activities within the scope of Request Fulfillment Management
- Coordinates with other Service Management roles
- Plans and manages tools needed to support Request Fulfillment Management process
- Responsible for recording and maintaining information
- Manages a set of service-related requests
- Develops and maintains Request Fulfillment management process and procedures
- Represents request fulfillment process in Change Advisory Board (CAB)
- Prepares reports to track and report on request fulfillment process

5.2. Request Fulfillment Analyst

[role description] assigns the Request Fulfillment Analyst role.

Responsibilities of Request Fulfillment Analyst:

- Acts as single point of contact for a service request until it has been fulfilled
- Ensures service requests are properly logged
- Service request classification, prioritization and escalation
- Fulfills service requests
- Monitors the status and progress of assigned service requests
- Monitors service requests
- Monitors service requests
- Updates Service Request Record

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

[Request Fulfillment Manager] produces reports monthly, with quarterly and yearly summaries.

Metrics to be reported:
- Total number of service requests
- Breakdown of service requests by category
- Number and percentage of service requests incorrectly categorized
- Number and percentage of service requests divided by topic
- Breakdown of service requests by time of day, to help predict peaks and ensure matching of resources

Reports are grouped into the following categories:
- Service request category
- Timeframe
- Service
- Location

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>
</tr>
</thead>
<tbody>
<tr>
<td>Service requests must be fulfilled efficiently and</td>
<td>Mean elapsed time for each type of service</td>
</tr>
<tr>
<td>are routed, handled and completed on time and in time</td>
<td>request</td>
</tr>
<tr>
<td>for each type of service request.</td>
<td>Mean elapsed time and percentage of fulfilled service requests divided by category</td>
</tr>
<tr>
<td></td>
<td>Total number of service requests, by category</td>
</tr>
<tr>
<td>Only authorized service requests are fulfilled.</td>
<td>Number of escalated service requests divided by category</td>
</tr>
<tr>
<td></td>
<td>Total numbers of properly authorized service requests</td>
</tr>
</tbody>
</table>

7. Managing records kept on the basis of this document
The Request fulfillment process uses [tool name] to handle Service Request Records and request regarding the tool.

Decisions about tool funding and implementation are made by [job description].

<table>
<thead>
<tr>
<th>Record name</th>
<th>Storage location</th>
<th>Person responsible for storage</th>
<th>Controls for record protection</th>
<th>Retention time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Request Record (in electronic form)</td>
<td>[tool name]</td>
<td>[job title]</td>
<td>Service Desk and request fulfillment analyst have the right to add to/change the record.</td>
<td>Service Request Records are kept for [...].</td>
</tr>
<tr>
<td>Reports</td>
<td>[tool name]</td>
<td>[job title]</td>
<td>Request Fulfillment Manager</td>
<td>Reports are kept for [...].</td>
</tr>
</tbody>
</table>

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: Service Request Catalogue
- Appendix 2: Service Request Record
- Appendix 3: Service Request Form

[legal requirement]

[signature]

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