

[Organization logo]

[Organization name]

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BUSINESS RELATIONSHIP MANAGEMENT PROCESS

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

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Change history

Date	Version	Created by	Description of change
	0.1	20000Academy	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 all activities, processes, and documents included in the SMS.

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

Commented [20A3]: Please include the name of your company.

2. Reference documents

- ISO/IEC 20000-1:2018, clauses 7.5.4. e) and 8.3.2
- Service Design and Transition Process
- Service Level Management Process
- Change Management Process
- Demand Management Process

Commented [20A4]: You can find a template for this document in the ISO 20000 Documentation Toolkit folder "09_Service_Design_Build_Transition_Processes/09.2_Service_Design_and_Transition".

Commented [20A5]: You can find a template for these documents in the ISO 20000 Documentation Toolkit folder "07_Relationship_and_Agreement_Processes/07.2_Service_Level_Management".

Commented [20A6]: You can find a template for this document in the ISO 20000 Documentation Toolkit folder "09_Service_Design_Build_Transition_Processes/09.1_Change_Management".

Commented [20A7]: You can find a template for this document in the ISO 20000 Documentation Toolkit folder "08_Supply_Demand_Processes/08.2_Demand_Management".

3. Process overview

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

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

- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]

Commented [20A8]: These are recommended objectives; you can include additional objectives or delete some according to your company practices.

3.1 Customer Portfolio

[Job title] is responsible to fill and maintain customer portfolios to manage information about customers in the Customer Portfolio.

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[Redacted]

[Redacted]

[Redacted]

Commented [20A10]: You can find a template for these documents in the ISO 20000 Documentation Toolkit folder "07_Relationship_and_Agreement_Processes/07.2_Service_Level_Management".

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3.2 Customer satisfaction

Customer satisfaction with existing services and [organization name]'s performance is the primary focus of the Business Relationship Management process. The Business Relationship Manager is responsible for

[organization name]

ensuring that the Customer Satisfaction Survey is carried out **once a year**, and that its results are recorded and analyzed. The Business Relationship Manager manages all issues that arise from the Customer

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The Business Relationship Manager is responsible for ensuring that all opportunities, requests, complaints, and compliments are tracked and documented in the Customer Portfolio.

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Commented [20A13]: Please insert the appropriate job title from the top management according to your organization practices, e.g.: CEO, CIO, IT Director, IT Manager, etc.

3.3 Service requirements

The Business Relationship Manager ensures that a customer's requirements are clarified, evaluated, and documented in the **Service Level Requirements** and communicated toward:

- [redacted]
- [redacted]
- [redacted]

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4. Process activities

4.1 Initiation

The Business Relationship Manager is responsible for ensuring that all opportunities, requests, complaints, and compliments are tracked and documented in the Customer Portfolio.

4.2 Requirement initiation by customer

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

4.2.1 Opportunity

The Business Relationship Manager is responsible for ensuring that all opportunities, requests, complaints, and compliments are tracked and documented in the Customer Portfolio.

1. [redacted]
2. [redacted]

Commented [20A15]: Choose one of the options according to your company practices.

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Commented [20A17]: These are generic topics that need to be discussed with a customer. You can adjust them or include additional ones according to your company practices.

The Business Relationship Manager is responsible to:

- Organize review meetings with customers, at least **once a quarter**
- Review services that the customer uses
- Detect, define, and pass along to other SMS processes all opportunities identified by the customer or as a result of a review meeting with the customer

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1. [redacted]
2. [redacted]
3. [redacted]

Commented [20A19]: You can change the frequency according to your company practices.

[organization name]

- Create reports; e.g., Service Performance Review Report

The Business Relationship Manager ensures that:

- The customer's business environment is understood
- Further activities with opportunities are monitored
- Activities between several processes are coordinated

[Redacted text]

Commented [20A20]: Business Relationship Manager or Service Level Manager

Commented [20A21]: You can find a template for this document in the ISO 20000 Documentation Toolkit folder "09_Service_Design_Build_Transition_Processes/09.1_Change_Management".

4.2.2 Request for change

The Business Relationship Manager ensures that the customer is assisted in completing and submitting the Request for Change and Change Record. After the RFC is submitted, the Business Relationship Manager:

- Represents the customer in the Change Advisory Board (CAB)
- Monitors the change fulfillment throughout the Change Management process
- Provide status updates to the customer
- Requests additional information from the customer

[Redacted text]

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4.2.3 Other requests

The Business Relationship Manager is responsible for ensuring that all customer requests are documented in the Service Request Record, processed, and communicated as defined in section 4.2.1. The Service Request Management process is used to process such requests.

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4.2.4 Complaint

The Business Relationship Manager is responsible to:

[Redacted text]

- Review outstanding complaints and escalate, if needed:
 - inside own organization to [job title]
 - toward customer to [job title]
- Analyze trends
- Provide the customer with feedback
- Put complaints on the agenda of the review meeting

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[Redacted text]

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5. Roles and responsibilities

[Job title] assigns the Business Relationship Manager role.

Responsibilities of the 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
- Responsible for reporting and managing information
- Develops and maintains the 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

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6. Measurement and reporting

The Business Relationship Manager is responsible to:

- Produce [monthly] reports and send them to the interested parties
- Produce [quarterly] and [yearly] summary reports
- Based on measurements, identify any aspects that require improvement

Whenever the SMS objectives are updated in the SMS Plan, the Business Relationship Manager reviews and updates the CSFs and KPIs in the Matrix of Process Measurements to reflect the new objectives.

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7. Managing records kept on the basis of this document

[organization name]

Record name	Storage location	Person responsible for storage	Controls for record protection	Retention time
Customer Portfolio (in electronic form)	[tool name]	[job title]	Business Relationship Manager has the right to add/change the record.	Records are kept for [3 years].
Customer Complaint Report	[tool name]	[job title]	Business Relationship Manager	Reports are kept for [3 years].
Service Performance Review Report	[tool name]	[job title]	Business Relationship Manager	Reports are kept for [3 years].
Customer Satisfaction Survey	[tool name]	[job title]	Business Relationship Manager	Reports are kept for [3 years].
Reports	[tool name]	[job title]	Business Relationship Manager	Reports are kept for [3 years].

Commented [20A37]: Overall responsibility for BRM. Usually Business Relationship Manager.

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Commented [20A45]: Overall responsibility for Records. Usually Business Relationship Manager.

Commented [20A46]: Change if needed.

Commented [20A47]: You can adapt the retention period according to your company practices.

Commented [20A48]: Please include the name of the report(s) that the Business Relationship Manager should prepare according to your company practices as defined in section 6.

If the Business Relationship Manager should prepare more than one report, please write each report in a separate row.

Commented [20A49]: You can adapt the retention period according to your company practices.

Commented [20A50]: Example: for current year (YTD) – in [tool name], otherwise archived in [tool name or place of archive].

Commented [20A51]: This is only recommendation; you can adjust the frequency according to your company practices.

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

[Job title]

[Name]

[organization name]

[Signature]

Commented [20A52]: Only necessary if the Procedure for Document and Record Control prescribes that paper documents must be signed.