[Organization logo]

[Organization name]

SERVICE DESIGN AND TRANSITION PROCESS

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

Change history

Date	Version	Created by	Description of change
	0.1	20000Academy	Basic document template

Table of contents

1. Purpose, scope and users

The aim of this document is to define the purpose, scope, principles, and activities of the Service Design and Transition process.

This document is applied to all processes and activities within 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 insert the name of your company.

2. Reference documents

- ISO/IEC 20000-1:2018, clauses 7.5.4.e), 8.5.2.
- Service Level Management Process
- Change Management Process
- Configuration Management Process
- Business Relationship Management Process

> **Commented [20A4]:** You can find a template for this document in the ISO 20000 Documentation Toolkit folder "07_Relationship_Agreement_Processes/ 07.2_Service_Level_Management".

> **Commented [20A5]:** 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 [20A6]:** You can find a template for this document in the ISO 20000 Documentation Toolkit folder "06_Service_Portfolio_Processes/ 06.3_Configuration_Management".

> **Commented [20A7]:** You can find a template for this document in the ISO 20000 Documentation Toolkit folder "07_Relationship_Agreement_Processes/ 07.1_Business_Relationship_Management".

3. Process overview

The scope of the Service Design and Transition process includes all new or changed services that have the potential to have a major impact on services or customers, as defined in the Change Policy.

Objectives of the Service Design and Transition process are as follows:

- Control the planning, design, and delivery of new or changed services according to criteria defined in the Change Policy
- Provide a mechanism for managing the design and transition of new or changed services
- Ensure optimal risk management and delivery of a solution that meets service requirements

> **Commented [20A8]:** 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 [20A9]:** These are recommended objectives; you can include additional objectives or delete some according to your company practices.

3.1. Control of activities and Configuration Items (CIs)

Assessment, approval, scheduling, and reviewing of a new or changed service is controlled by the Change Management process. Configuration Items (CIs) affected by new or changed services are controlled by the Configuration Management process.

4. Process activities

4.1. Planning of new or changed services

4.1.1. Service requirements

The Service Level Manager is responsible ~~to identify service requirements for the new or changed services and enter them into the Service Level Requirements (SLR).~~

4.1.2. Plan

As input to planning, the Planning and Design Coordination Manager ensures that the following are considered:

- ~~Financial, organizational, and technical impacts of delivering new or changed services~~
- ~~Potential impact of the new or changed services on the SMS and current services~~
- ~~Criticality of services based on the needs of the organization, customers, users, and other interested parties~~
- ~~Alignment of new or changed services with the Service Management Policy, service management objectives, and service requirements, taking into consideration known limitations and risk~~

The Planning and Design Coordination Manager is responsible to plan new or changed services and, ~~based on requirements defined in the Service Level Requirements (SLR), produce the Service Design Package (SDP).~~

The Planning and Design Coordination Manager is responsible for ensuring that the following are defined within the scope of planning activities (see SDP):

- ~~Authorities and responsibilities for design, build, and transition activities~~
- ~~Activities to be performed by the organization or other parties, including activities across interfaces from the service provider to other parties~~
- ~~Communication to interested parties~~
- ~~Human, technical, information, and financial resources~~
- ~~Timescales for planned activities~~
- ~~Identification, assessment, and management of risk~~
- ~~Dependencies on other services~~
- ~~Testing required for the new or changed services~~
- ~~Service acceptance criteria~~
- ~~Intended outcomes from delivering the new or changed services, expressed in measurable terms~~
- ~~Impact on the SMS, other services, planned changes, customers, users, and other interested parties~~

4.2.   Design and development of new or changed services

4.2.1. Design

The Planning and Design Coordination Manager is responsible for ensuring that new or changed services are designed and documented to include at least the following:

- ~~Authorities and responsibilities for delivery of the new or changed services~~
- ~~Activities to be performed by the service provider, customer, and other parties for delivery of the new or changed services~~

- New or changed human resource requirements, including requirements for appropriate education, training, skills, and experience
- Financial resource requirements for delivery of the new or changed services
- New or changed technology to support the delivery of the new or changed services
- Changes to the SMS, including new or changed plans, policies, processes, procedures, resource, and knowledge
- New or changed contracts and other documented agreements to align with changes in service requirements
- New or changed tools
- Updates to the service catalog
- Impact on other services

The Planning and Design Coordination Manager is responsible to compare the design of new or changed services and the SDP and make the decision whether to accept or decline the proposed design. In case the design is declined, job title is informed.

4.2.2. Build

The Release and Deployment Manager is responsible for ensuring that new or changed services are developed in accordance with the design documented in the SDP.

4.3. Transition of new or changed services

4.3.1. Test

The Service Validation and Testing Practitioner is responsible to test new or changed services to verify they fulfill the service requirements and documented design, and to complete the Service Acceptance Criteria and Test Plan.

Based on the test results, Change Management (i.e., the Change Authority) is responsible to approve the new or changed service to be ready for deployment.

4.3.2. Deployment

The Release and Deployment Management Process is used to deploy approved new or changed services into the live environment.

4.3.3. Report

When deployment of the services finishes, the Release and Deployment Manager is responsible to communicate on the outcomes achieved against the expected outcomes.

5. Roles and responsibilities

5.1. Planning and Design Coordination Manager

[Job title] assigns the Planning and Design Coordination Manager role.

Responsibilities of Planning and Design Coordination Manager:

- Overall responsibility for carrying out planning and design activities within the scope of the Service Design and Transition Process
- Coordinates with other Service Management roles and processes
- Responsible for reporting and managing information
- Plans and coordinates resources and capabilities required to plan and design new or changed existing services
- Ensures that appropriate service designs / SDPs are developed and handed over to the transition phase
- Ensures that design of processes, services, information, technology and metrics meet both business and customer requirements
- Improves effectiveness and efficiency of service plan and design processes and activities
- Ensures that all parties involved in service planning and design adopt a common framework and standards, as well as reusable activities, processes and systems wherever possible

5.2.   Service Validation and Testing Manager

[Job title] assigns the Service Validation and Testing Manager role.

Responsibilities of the Service Validation and Testing Manager:

- Plans and manages the tools needed to support testing within the scope of the Service Design and Transition Process
- Responsible for reporting and managing information related to testing
- Allocates and manages work of staff involved in testing activities
- Develops and maintains testing activities and procedures
- Manages test environment requirements
- Plans and manages support of test tools

5.3.   Service Validation and Testing Practitioner

[Job title] assigns the Service Validation and Testing Practitioner role.

Responsibilities of the Service Validation and Testing Practitioner:

- Conducting tests
- Documenting, analyzing, diagnosing, reporting and managing test events, incidents and problems
- Administering test assets and components
- Producing reports and performing measurements

6.   Measurement and reporting

The Planning and Design Coordination Manager is responsible to:

- Produce [quarterly] and [yearly] summary reports
- Based on measurements, identify any aspects that require improvement

Manager reviews and updates the CSFs and KPIs in the Matrix of Process Measurements to reflect the new objectives.

> **Commented [20A24]:** You can change the frequency according to your company practices.
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> **Commented [20A25]:** You can find a template for this document in the ISO 20000 Toolkit folder ISO 20000 Toolkit folder "13_Management_Review".
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> **Commented [20A29]:** You can find a template for this document in the ISO 20000 Toolkit folder ISO 20000 Toolkit folder "13_Management_Review".

7. Managing records kept on the basis of this document

Record name	Storage location	Person responsible for storage	Controls for record protection	Retention time
Service Acceptance Criteria	[tool name]	Planning and Design Coordination Manager	Planning and Design Coordination Manager	Records are kept for [3 years].
Service Design Package	[tool name]	Planning and Design Coordination Manager	Planning and Design Coordination Manager	Reports are kept for [3 years].
Test Plan	[tool name]	Service Validation and Testing Manager	Service Validation and Testing Manager	Records are kept for [3 years].
Reports	[tool name]	Planning and Design Coordination Manager	Planning and Design Coordination Manager	Reports are kept for [3 years].

> **Commented [20A30]:** Change if needed.
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> **Commented [20A32]:** You can adapt the retention period according to your company practices.
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> **Commented [20A41]:** You can adapt the retention period according to your company practices.
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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.

Commented [20A42]: Please insert the appropriate job title according to your organization practices, e.g.: IT Manager, Service Manager, etc.

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9. Appendices

- Appendix 1 – Service Acceptance Criteria
- Appendix 2 – Service Design Package
- Appendix 3 – Test Plan

[Job title]
[Name]

_____
[Signature]

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