

[Organization logo]

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SERVICE REQUEST 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 outline

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1. Purpose, scope and users

The aim of this document is to define the purpose, scope, principles and activities for the Service Request Management process.

This document is applied to all processes and activities of 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 8.6.2; 7.5.4.e)
- Change Management Process
- Configuration Management Process
- Information Security Management Process
- Service Level 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/09.1_Change_Management".

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

Commented [20A6]: You can find a template for this document in the ISO 20000 Documentation Toolkit folder "11_Service_Assurance_Processes/11.3_Information_Security_Management".

Commented [20A7]: You can find a template for these documents in the ISO 20000 Documentation Toolkit folder "07_Relationship_Agreement_Processes/07.2_Service_Level_Management".

3. Process overview

The purpose of Service Request Management is to support the agreed quality of services by handling all pre-defined, user-initiated service requests in an effective and user-friendly manner.

The scope of the Service Request Management process encompasses all service requests that are initiated by the customer.

The objectives of Service Request Management are as follows:

- Ensure that service requests are handled in a timely and effective manner.
- Ensure that service requests are handled in a consistent manner.
- Ensure that service requests are handled in a transparent manner.
- Ensure that service requests are handled in a secure manner.
- Ensure that service requests are handled in a cost-effective manner.
- Ensure that service requests are handled in a customer-centric manner.
- Ensure that service requests are handled in a data-driven manner.

Commented [20A8]: You can find a template for this document in the ISO 20000 Documentation Toolkit folder "04_SMS_Plan".

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

4. Process activities

The employee assigned to handle the service request is responsible for ensuring, as a service request

[organization name]

history is available. Employees involved in the Service Request Management Process use the Service Request Catalog for classification, prioritization, fulfillment instructions and SLA requirements.

4.1. Service request recording

Service requests can be recorded by:

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

First-line staff is responsible for entering service request data in cases where a service request is opened by phone.

Mandatory data that need to be recorded are:

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

4.2. Service request prioritization

Priority code	Description
1	Critical
2	High
3	Medium
4	Low
5	Planned

Service request priority defined by a user can be/can't be changed by the First-Line Analyst.

4.3. Service request classification

Commented [20A10]: [redacted]

Commented [20A11]: [redacted]

Commented [20A12]: Insert e-mail address that is used to open a request

Commented [20A13]: Insert phone number in appropriate format.

Commented [20A14]: Insert phone number in appropriate format.

Commented [20A15]: You can adjust these according to your company practices.

[redacted]

Commented [20A16]: You can delete this sentence if requests cannot be opened by phone.

Commented [20A17]: Delete this if the service request number is not provided automatically.

Commented [20A18]: [redacted]

Commented [20A19]: This is only example you can modify this table and include other priority levels according to your company practices.

Commented [20A20]: Choose the one that is applicable according to your company practices.

[organization name]

[Redacted text]

Classification is defined in the Service Requests Catalog.

4.4. Escalation

To increase efficiency and avoid unnecessary escalation, the staff involved in Service Request Management has access to and uses the following resources:

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

If service requests, cannot be fulfilled, the escalation procedure is carried out. There are two escalation possibilities:

- [Redacted]
- [Redacted]

The First-Line Analyst is responsible for the ownership of the service requests during the escalation procedure.

4.4.1. Functional Escalation

Functional escalation is triggered by First-Line Analyst / [tool name] tool. Functional escalation of a service request is escalation to a specialist group. The SLA (Service Level Agreement) and Supplier

4.4.2. Hierarchical Escalation

- For high-priority service requests – Service Level Manager is informed about such requests
- [Redacted]

First-Line Analyst is responsible to handle escalation and inform the Service Request Manager.

4.5. Resolution

Service Request Manager ensures that fulfillment of a service request remains within the agreed fulfillment time as defined in the Service Level Agreement. Service Request Manager is responsible

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Commented [20A23]: You can find a template for this document in the ISO 20000 Documentation Toolkit folder "09_Service_Design_Build_Transition_Processes/09.3_Release_and_Deployment_Management".

Commented [20A24]: These are only recommendations you can adjust them according to your company practices.

Commented [20A25]: [Redacted]

Commented [20A26]: [Redacted]

Commented [20A27]: Choose the one that applies according to your company practices.

[Redacted]

Commented [20A28]: Change if needed.

Commented [20A29]: Change according to the SLA and Supplier Contract definition.

Commented [20A30]: Adapt this to your company practices. Please note that the same value should be defined in the SLA.

Commented [20A31]: You can find a template for these documents in the ISO 20000 Documentation Toolkit folder "07_Relationship_Agreement_Processes/07.2_Service_Level_Management".

[organization name]

- To define personnel responsible to test and apply the service request
- To ensure that the service request record is updated
- To coordinate activities between specialist groups or third parties

When successfully fulfilled, the resolving group passes the service request back to the First-Line Analyst for closure action.

The First-Line Analyst checks that the service request is fully resolved and that the user has accepted and agrees to sign that the service request is closed.

[Redacted text block]

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4.6. Change Management

Change Manager is responsible to decide which type of service requests will be handled through the

[Redacted text block]

Commented [20A33]: Choose the one that applies according to your company practices.

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5. Roles and responsibilities

5.1. Service Request Manager

[Job title] assigns the Service Request Manager role.

Responsibilities of Service Request Manager are:

- [Redacted text block]
- [Redacted text block]
- [Redacted text block]
- [Redacted text block]
- [Redacted text block]
- [Redacted text block]
- [Redacted text block]
- [Redacted text block]
- [Redacted text block]
- [Redacted text block]
- [Redacted text block]
- [Redacted text block]

Commented [20A35]: Please insert the appropriate job title according to your organization practices, e.g.: IT Manager, Service Manager, etc.

Commented [20A36]: You can delete this if your company does not have Third-Line Analysts.

Commented [20A37]: These are only examples you can delete some or include additional ones according to your company practices.

5.2. First-Line Analyst (1st Level)

[Job title] assigns the First-Line Analyst role.

[Redacted text block]

Commented [20A38]: Please insert the appropriate job title according to your organization practices, e.g.: IT Manager, Service Manager, etc.

[organization name]

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

5.3. Second-Line Analyst (2nd Level)

[Job title] assigns the Second-line Analyst role.

Responsibilities of the Second-Line Analyst

- [redacted]

Commented [20A39]: These are only examples you can delete some or include additional ones according to your company practices.

Commented [20A40]: [redacted]

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6. Measurement and reporting

The Service Request Manager is responsible to:

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

Commented [20A42]: You can change the frequency according to your company practices.

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Commented [20A44]: You can change the frequency according to your company practices.

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

Commented [20A46]: You can change the frequency according to your company practices.

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 Request Catalog	[tool name]	[job title]	Service Request Manager	Service Request Catalog is kept forever.

Commented [20A47]: Overall responsibility for Service Request Records. Usually Service Request Manager.

Commented [20A48]: Change if needed.

[organization name]

Service Request Record	[tool name]	[job title]	First Line Analyst and Second Line Analyst have the right to add/change the record.	Service Request Records are kept forever.
Reports	[tool name]	[job title]	Service Request Manager	Reports are kept for [3 years].

Commented [20A49]: Overall responsibility for Service Request Records. Usually Service Request Manager.

Commented [20A50]: Please insert the appropriate job title according to your organization practices, e.g.: IT Manager, Service Manager, etc.

Commented [20A51]: Change if needed.

Commented [20A52]: You can adapt the retention period 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.

Commented [20A53]: Please insert the appropriate job title according to your organization practices, e.g.: IT Manager, Service Manager, etc.

Commented [20A54]: This is only a recommendation you can adapt the frequency according to your company needs.

9. Appendices

- Appendix 1 – Service Request Catalog
- Appendix 2 – Service Request Record

[Job title]

[Name]

[Signature]

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