ISO 20000 Documentation Toolkit

https://advisera.com/20000academy/iso-20000-documentation-toolkit/

Note: The documentation should preferably be implemented in the order in which it is listed here.

No.	Doc. Code	Name of Document	ISO 20000 Clause	Mandatory document according to ISO 20000
	00	**Document Management**		
1	00	Procedure for Document and Record Control	7.5	✔
	01	**Preparations for the Project**		
2	01	Project Plan for Implementation of the Service Management System		
	02	**Service Management System Scope**		
3	02	Service Management System Scope	7.5.4.a), 4.3	✔
	03	**Service Management System Policy**		
4	03	Service Management System Policy	5.2, 6.2	✔
	04	**Service Management System Plan**		
5	04	Service Management System Plan	6.3	✔
6	04.1	Appendix 1 – Processes Operated by Third Parties		
7	04.2	Appendix 2 – List of Services Template	6.3.a)	✔
8	04.3	Appendix 3 – Training and Awareness Plan	7.2, 7.3	✔
	05	**Risk Management**		
9	05	Risk Management Policy	6.1	✔
10	05.2	Appendix 1 – Risks and Opportunities Register	8.7.2	✔
	06	**Service Portfolio Processes**		
	06.1	Service Catalog Management		
11	06.1	Service Catalog Management Process	8.2.4	✔
12	06.1.1	Appendix 1 – Service Catalog	8.2.4	✔
	06.2	Asset Management		
13	06. 2	Asset Management Process	8.2.5	✔
14	06.2.1	Appendix 1 – IT Asset Register	8.2.5	
	06.3	Configuration Management		

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15	06.3	Configuration Management Process	8.2.6	✔️
16	06.3.1	Configuration Management Database	8.2.6	✔️
07		**Relationship and Agreement Processes**		
	07.1	Business Relationship Management		
17	07.1	Business Relationship Management Process	8.3.2	✔️
18	07.1.1	Appendix 1 – Customer Portfolio	8.3.2	✔️
19	07.1.2	Appendix 2 – Customer Complaint Report	8.3.2	✔️
20	07.1.3	Appendix 3 – Customer Satisfaction Survey	8.3.2	✔️
21	07.1.4	Appendix 4 – Service Performance Review Report	8.3.2	✔️
	07.2	Service Level Management		
22	07.2	Service Level Management Process	8.3.3	✔️
23	07.2.1	Appendix 1 – Service Level Agreement Template	8.3.3	✔️
24	07.2.2	Appendix 2 – Service Report	8.3.3	✔️
25	07.2.3	Appendix 3 – Customer Agreement Portfolio	8.3.3	✔️
26	07.2.4	Appendix 4 – Service Level Requirements	8.2.2, 8.3.3	✔️
	07.3	Supplier Management		
27	07.3	Supplier Management Process	8.3.4	✔️
28	07.3.1	Appendix 1 – Supplier Contract Template	8.3.4	✔️
29	07.3.2	Appendix 2 – Supplier Performance Report	8.3.4	✔️
30	07.3.3	Appendix 3 – Supplier Agreement Portfolio	8.3.4	✔️
31	07.3.4	Appendix 4 – Operational Level Agreement Template	8.3.4.2	✔️
32	07.3.5	Appendix 5 – External Suppliers Dispute Record	8.3.4.1	✔️
08		**Supply and Demand Processes**		
	08.1	Budgeting and Accounting for Services		
33	08.1	Budgeting and Accounting for Services Process	8.4.1	✔️
34	08.1.1	Appendix 1 – Budgeting and Controlling	8.4.1	
	08.2	Demand Management		

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35	08.2	Demand Management Process	8.4.2	✓
	08.3	Capacity Management		
36	08.3	Capacity Management Process	8.4.3	✓
37	08.3.1	Appendix 1 – Capacity Plan	8.4.3	✓
38	08.3.2	Appendix 2 – Capacity Measurement Report	8.4.3	
	09	**Service Design, Build and Transition Processes**		
	09.1	Change Management		
39	09.1	Change Management Process	8.5.1	✓
40	09.1.1	Change Management Policy	8.5.1.1	✓
41	09.1.2	Appendix 1 – Request for Change and Change Record	8.5.1.2, 8.5.1.3	✓
42	09.1.3	Appendix 2 – Minutes of Meeting CAB	8.5.1	
43	09.1.4	Appendix 3 – Change Schedule	8.5.1.3	
	09.2	Service Design and Transition		
44	09.2	Service Design and Transition Process	8.5.2	✓
45	09.2.1	Appendix 1 – Service Acceptance Criteria	8.5.2.1, 8.5.2.3	✓
46	09.2.2	Appendix 2 – Service Design Package	8.5.2.2	✓
47	09.2.3	Appendix 3 – Test Plan	8.5.2.1, 8.5.2.3	✓
	09.3	Release and Deployment Management		
48	09.3	Release and Deployment Management Process	8.5.3	✓
49	09.3.1	Appendix 1 – Release and Deployment Plan	8.5.3	✓
50	09.3.2	Appendix 2 – Release and Deployment Policy	8.5.3	✓
	10	**Resolution and Fulfillment Processes**		
	10.1	Incident Management		
51	10.1	Incident Management Process	8.6.1	✓
52	10.1.1	Appendix 1 – Incident Record	8.6.1	✓
53	10.1.2	Appendix 2 – Major Incident Report	8.6.1	✓
	10.2	Service Request Management		
54	10.2	Service Request Management Process	8.6.2	

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55	10.2.1	Appendix 1 – Service Request Catalog	8.6.2	✓
56	10.2.2	Appendix 2 – Service Request Record	8.6.2	✓
	10.3	Problem Management		
57	10.3	Problem Management Process	8.6.3	✓
58	10.3.1	Appendix 1 – Problem Record	8.6.3	✓
59	10.3.2	Appendix 2 – Known Error Record	8.6.3	✓
	11	**Service Assurance Processes**		
	11.1	Availability Management		
60	11.1	Availability Management Process	8.7.2	✓
61	11.1.1	Appendix 1 – Availability Measurement Report	8.7.1	✓
62	11.1.2	Appendix 2 – Availability Plan	8.7.1	✓
	11.2	IT Service Continuity Management		
63	11.2	IT Service Continuity Management Process	8.7.2	✓
64	11.2.1	Appendix 1 – IT Service Continuity Management Plan	8.7.2	✓
65	11.2.2	Appendix 2 – Business Impact Analysis and Recovery	8.7.2	✓
66	11.2.3	Appendix 3 – IT Service Continuity Plan Test and Review Report	8.7.2	✓
	11.3	Information Security Management		
67	11.3	Information Security Management Process	8.7.3	✓
68	11.3.1	Appendix 1 – Information Security Management Policy	8.7.3.1	✓
	12	**Internal Audit**		
69	12	Procedure for Internal Audit	9.2.1	
70	12.1	Appendix 1 – Annual Internal Audit Program	9.2.2	✓
71	12.2	Appendix 2 – Internal Audit Report	9.2.2	✓
	13	**Management Review**		
72	13	Management Review Minutes	9.3	✓
73	13.1	Appendix 1 – Matrix of Process Measurements	9.3	✓
	14	**Maintain and Improve**		

No.	Doc. Code	Name of Document	ISO 20000 Clause	Mandatory document according to ISO 20000
73	14	Continual Service Improvement Process	10.2	✅
74	14.1	Appendix 1 – Continual Service Improvement Register	10.2	✅
75	14.2	Appendix 2 – Corrective or Preventive Action Form	10.1.1, 10.1.2	✅