

Due Diligence Topics and questions to be covered

Service

Customer engagement (CE) process-model

CE organisational structure
CE location and number of resources
CE engagement process & workflow diagrams
Pre-sales and proposal process
New service development process
Project delivery and service request process
Business application service agreements
Resource management
Program management office / portfolio management
Customer touch points
Estimation/quoting processes, gates & thresholds
Approval processes, gates and thresholds
CE documentation / templates
Involvement in customer business planning process

Customer engagement tools / applications

CRM applications
Spreadsheets, address books etc

Customer profiles

Customer department/section name
Role
Number of ICT users
Major systems used / any high availability requirements
Special requirements

Service delivery (SD) process model

SD Organisational structure
SD Process or workflow diagrams
SD categories
Cost recovery approach for delivered services
Service levels
Customer touch points'
Service delivery approval, gate & thresholds
Key Service Delivery reports
Key Service Performance reports

Service delivery (SD) management

SD management systems –requests, delivery timelines, issue escalation, complaints handling process, delivery acceptance or closure
Key reports, issues register etc
Service delivery reports
Service performance reports

Due Diligence Topics and questions to be covered

Service catalogue

Is there a formal/informal service catalogue
How is catalogue used by customer
Is service catalogue current / complete
Effort required to bring catalogue up to date

Service price lists & pricing model

Is there a service price list
Is there a service pricing model
How is it calculated
How often are prices revised/changed
What is process for changing
Is service catalogue linked to pricing
What services fall outside of pricing model
Who maintains pricing model

Service levels and business application SLA

Are there corporate service levels
Are there separate business application agreements
Do SLA's cover all or majority of services provided?
Do SLA's cover majority of services in catalogue?
Are the SLA's templated?
Who keeps the corporate & business SLA's
How are SLA' reviewed against actual levels
Provide latest copies of SLA's performance report for last 6 months for each SLA

Seasonal or periodic services or objectives

Does Dept have seasonal/special objectives that require non-std service delivery?
Record seasonal/periodic requirements
Obtain 3 written examples of scope & requirements

Agreements or MOUs with customers (internal/external)

List & provide high levels details
Obtain 3 written examples
Cost recovery & resourcing arrangement

In-flight projects

Scope + current phases / stages
Deliverables & key milestones
Schedule
Financials
Governance