

Customer Engagement – Due Diligence questionnaire

#	Information Required	Contact Details
1	<p>Customer engagement (CE) process-model:</p> <p>What is the published CE model? This may include diagrammatic or textual documentation of the process used to engage with the Customer's internal or external customers:</p> <ul style="list-style-type: none"> • CE organization structure (number and position titles), • CE Process or workflow diagrams, <ul style="list-style-type: none"> ○ Pre-sales and proposals ○ New service development process ○ Project delivery and service requests ○ Business application service agreements ○ Resource management ○ Program management office / portfolio management • Customer touch points (name and/or position titles), • Estimation and proposal development and review processes • Approval processes, 'approval-gates' and approval thresholds. • CE documentation / templates (e.g. proposals, standard clauses / terms), • Involvement in customer business planning processes. 	
2	<p>Customer engagement tools / applications:</p> <p>Are there any computer applications used for customer engagement? This may include systems or applications used to plan and/or record customer contacts details, customer meetings, complaints handling process, high level requirement gathering process, demand assessment process etc.:</p> <ul style="list-style-type: none"> • CRM applications (please provide high level documentation and verbal briefings [walkthrough] on functions used, version, level of expertise, future training requirements etc.). • Spreadsheets, address books etc. (provide copies and verbal briefings) 	

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3	<p>Customer profiles:</p> <p>Please provide a brief description for each of the customers and their ICT infrastructure budget. This information is required to establish a high level view of the Customer's ICT service customer base and their ICT infrastructure spending. An order of magnitude budget figures are sufficient:</p> <ul style="list-style-type: none"> • Customer / section name. • Their role. • Number of ICT users. • Major systems used. Any high availability systems? • Any special requirements such as use of legacy system or non-standard software? 	
4	<p>Service delivery (SD) process-model:</p> <p>What is the published SD model for delivering routine and non-standard services to internal or external customers? This may include diagrammatic or textual documentation of the process used to engage with the Customer's internal or external customers:</p> <ul style="list-style-type: none"> • SD Process or workflow diagrams – including escalation process and escalation points. • SD Categories if any (small / large, routine / project, normal / VIP), • How is costs recovered for delivered services? If invoiced or reported, provide a copy of last months recovery (e.g. Invoices / Bill). • Are there specific SLAs for these categories? (examples) • SD organization structure (number, position titles), • Customer touch points (people and positions), • Service Delivery approval processes, 'approval-gates' and approval thresholds, • Key SD reports, frequency, audience etc., <p>SD documentation templates (e.g. acceptance, fault-QA reports, completion notifications),</p>	
5	<p>Service delivery (SD) application systems:</p> <p>Are there any computer applications used for service delivery management? This may include applications used to plan and/or record customer's SD requests, delivery timelines, issue escalation, complaints handling process, delivery acceptance or closure etc.:</p> <ul style="list-style-type: none"> • SD management applications (please provide high level documentation and verbal briefings [walkthrough] on functions used, version, level of expertise, how supported, future training requirements etc.). <p>Key reports, issues register etc. (provide copies, recipients, frequency of production).</p>	

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6	<p>Service catalogue:</p> <p>Is there a service catalogue that is used / referred to by the Customer's customers? This may be a published document or web based. Provide a copy of the catalogue or access to the catalogue application and a walk through of the catalogue.</p> <ul style="list-style-type: none"> • How is the catalogue used by the customer? All the time / frequently / rarely? • Is this up to date? What update is required? When was it updated? <p>What effort is required to bring the service catalogue is up to date?</p>	
7	<p>Service price list and pricing model:</p> <p>Is there a standard price list for services within the service catalogue? Is there a pricing model for computing the prices for the ICT services provided by the Customer?</p> <ul style="list-style-type: none"> • Is there a standard price list for services within the service catalogue? Please provide a copy. • Is there a pricing model and methodology for computing prices for ICT services? How is this calculated? If there is a price derivation routine (e.g. Excel), please provide a copy and documentation or provide a walk through) • How often are the prices revised / changed? What is the process for price change? • Is the catalogue linked to the service catalogue? • What services fall outside the pricing model? How are they derived at? <p>Who maintains the pricing model?</p>	
8	<p>Service levels and business application service agreements:</p> <p>Are there corporate service levels for the ICT services provided? Do the corporate service levels cover all or majority of the services provided? Are there specific service level agreements for business applications?</p> <ul style="list-style-type: none"> • Are the Corporate Service Levels templated? If so provide a copy of an SLA belonging to each template. Who keeps the SLA templates? • Are there separate service agreements for any business applications? If so provide copies of business application SLAs. Who keeps the business application SLA's? • Who keeps the Corporate and Business Application SLAs? • How are the SLAs reviewed against the actual levels of services achieved? Who reviews them? Who are the customer representatives in the review? How are the –ve variations in the SLA performance addressed? <p>Please provide the latest copy of the SLA performance reports during the past 6 months for each of the SLAs.</p>	

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9	<p>Seasonal / periodic services or objectives:</p> <p>Do the Customer's customers have seasonal / special objectives that require non-standard service delivery?, special events etc.? How are these scoped and delivered?</p> <ul style="list-style-type: none"> • Please list and provide high level details of all the seasonal / special ICT requirements that have occurred during the past 18 months. • Provide three written examples of the scope, customer needs analysis or requirement specification for such seasonal / special objectives. <p>What is the arrangement for resourcing and the cost recovery of these services?</p>	
10	<p>Agreement or MOUs with customers (internal or external):</p> <p>Do the Customer customers have any memorandum of understanding or formal agreement (other than the SLA) to provide ICT services to customers? E.g. DISPLAN, Emergency Management, Event Management etc.</p> <ul style="list-style-type: none"> • Please list and provide high level details of all the MOUs that have been created or exercised during the past 18 months. • Provide three written examples of the scope or requirement specification for such MOUs. <p>What is the arrangement for resourcing and the cost recovery of these services?</p>	

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