Managed Service Design Policy

PHX064

Contents

Required Documentation

All Managed Services require supporting documentation for the standardization of the service; to aid the understanding of internal staff delivering, supporting, and selling the service; and to help manage the expectations of customers before, during, and after the procurement phase and into business-as-usual consumption activities.

To support the design and planning stages of the managed service development, each managed service offering must have the following documentation as a minimum:

a) Service Management Plan
b) DPIA Template for Services & Products
c) Service Catalogue
d) Customer-facing Service Welcome Pack
e) Works Order and Service Description
f) Internal-facing Technical Process Runbooks where appropriate

The documents must be created by the subject matter experts acting as stakeholders for the managed service offering.

This documentation must be reviewed and approved by the service stakeholders.

Further information and guidance regarding content is available within the Managed Service Design Checklist Document within Teams.

Approval

Managed Service design documentation must have the approval of stakeholders prior to being sold to customers.

Testing

Service functions must be tested prior to go-live. In the event service functions are being performed regularly through other managed service offerings and are not unique to the new managed service offering, testing is not needed. If only part of a service function is currently being performed regularly through other managed service offerings, the whole function must be tested to ensure integration with new requirements

| Classification: | Company Confidential | | Revision Number: | 3.0 | |
| Reference: | PHX064 | | Revision Date: | 10th May 2023 | Page | 2 |

Please treat this information as private and confidential.

Service Configuration Management

The responsibilities of configuration management include:

a) Providing accurate and reliable information to the Phoenix and customers about all the components of the Services to allow for appropriate data and information security reviews.
b) Keep the configurations database up-to-date:
    a. Up-to-date records of all CIs: identification, type, location, status, etc.
    b. Interrelations between CIs
    c. Services provided by each CI
c) Serve as a support to the other processes, in particular to incident management, problem management and changes management.

Service Configuration is documented within Service Management Plans for each service.

Review

All Managed Service offerings must be reviewed annually to ensure:

a) The offering remains profitable
b) The offering continues to provide value to the customers
c) If any new value is discovered while performance the service, this is documented and communicated to the sales team
d) The marketing and messaging around the service remains appropriate and relevant to customers
e) The documentation remains accurate in the event of any changes to the offering
f) Any new service functions are documented to ensure any scope creep is agreed and documented

It is the responsibility of the Governance Manager to ensure that reviews are taking place and the appropriate stakeholders are engaging with reviews.

Continual Improvement

Continual improvement is critical to ensure that we meet the requirements of the organization as well as our stakeholders; customers, suppliers, and employees. The aim of our continual improvement process is to improve the capability of meeting and satisfying our customers' needs.

Policy Compliance

If any user is found to have breached this policy, knowingly or unknowingly, they may be subject to Phoenix disciplinary procedure. If a criminal offence is considered to have been committed further action may be taken to assist in the prosecution of the offender(s).

If you do not understand the implications of this policy or how it may apply to you, please seek advice from the Phoenix HR Manager or any member of the Service Management Committee.

Policy Governance

The following table identifies who within Phoenix is Accountable, Responsible, Informed or Consulted with regards to this policy. The following definitions apply:

- **Responsible** – the person(s) responsible for developing and implementing the policy.
- **Accountable** – the person who has ultimate accountability and authority for the policy.
- **Consulted** – the person(s) or groups to be consulted prior to final policy implementation or amendment.
- **Informed** – the person(s) or groups to be informed after policy implementation or amendment.

Responsible	Head of Service Delivery
Accountable	Operations Director / Managing Director
Consulted	Directors, Service Management Committee
Informed	All employees, contractual partners, and third-party agents applicable to the service management system scope

Review and Revision

This policy is reviewed as it is deemed appropriate, but no less frequently than every 12 months.

Policy review will be undertaken by the SMS with any subsequent changes authorised by the Managing Director or Operations Director.

Version Control

Author	Version	Date	Description
Amy Trimble	1.0	01/04/2020	Company distribution
Amy Trimble	1.0	01/03/2021	Annual review
Amy Trimble	2.0	01/08/2021	Additional DPOIA requirements included
Amy Trimble	3.0	16/02/2022	Configuration management requirements included
SMC	3.0	10/05/2023	Annual review – no changes

Document Approval

Name	Version	Date	Position
Clare Metcalfe	1.0	01/04/2020	Operations Director
Clare Metcalfe	2.0	01/08/2021	Operations Director
Clare Metcalfe	3.0	16/02/2022	Operations Director
Clare Metcalfe	3.0	11/05/2023	Operations Director

Signed: *Clare Metcalfe*   Clare Metcalfe, Operations Director

Dated: 11/05/2023