

Instructions

The purpose of this document is to ensure that any reader or user of this template will have clarity in how to populate it, and with what details. The following pages provide the recommended body of the template.

This standard template has been developed by members of the SLM SIG Working Party and includes significant input from itSMF members, contributing at various SLM SIG events. The contributing members span a wide range of industries, both public and private sector, and include users, vendors, consultants and managed service providers.

In using this template you need to recognise that one size does not fit all and that you will certainly need to adapt the template to your own organisation.

1. Save this template under a new name before initial population.
2. Review & complete all relevant sections in this template.
3. Remove all sections that are not relevant.
4. Replace or remove all coloured text from the final draft of this document.
 - a. Replace all text in **red** with appropriate text (required text in final document).
 - b. Remove all text in **blue** (instructions and guidance for population).
5. Adjust template text as required to reflect unique requirements.
6. Change document Header and Footer to represent your own company standards.
7. Spell check document.
8. Convert all text to Black.
9. Add cover page according to your own company standards indicating what the document is, e.g. Policy, OLA, SLA, etc
10. Update Table of Contents.
11. Remove this page before final publication.

Please ensure that the itSMF Ltd copyright footer is retained whenever this document is edited or distributed.

Service Level Requirements

Contents

1	DOCUMENT CONTROL	4
1.1	Signatories	4
1.2	Distribution List	4
1.3	Version History	4
2	INTRODUCTION	5
2.1	Purpose	5
2.2	Scope	5
3	THE BUSINESS:	5
3.1	Business Owner:	5
3.2	Business Signatory:	5
3.3	Customer Liaison:	5
3.4	Escalation Contact # 1:	5
3.5	Escalation Contact # 2:	5
3.6	User Profile:	5
3.7	Expected Number of Users & Location(s):	5
3.8	Approvers/Stakeholders:	5
4	THE SERVICE: <NAME OF SERVICE>	6
4.1	Service Catalogue Reference:	6
4.2	Service Name:	6
4.3	Service Start Date:	6
4.4	Service Description:	6
4.5	Service Provider (Where Known):	6
4.6	Service Days:	6
4.7	Service Hours:	6
4.8	Required Availability (in % terms e.g. 99.5%):	7
4.9	Charging Method:	7
4.10	Acceptable Downtime:	7
4.11	Service Tier: (Bronze, Silver, Gold, Platinum)	7
4.12	Expected Service Capacity	7
4.13	Service Risk Category	8
4.14	Security Requirements:	8
4.15	Business Continuity Restoral Priorities:	8
5	REVIEW AND REPORT	8
5.1	Periodic Report Requirements:	8
5.2	Real time performance and availability reporting requirements:	8
5.3	Service Performance Review Cycle:	8
6	SLR SIGNOFF	9

1 Document Control

This section should contain your organisations standard document control items, such as:

- Document Filename and version
- Document Reviewer list
- Document Distribution list
- List of references to other documents
- List of figures

1.1 Signatories

The aim should be to keep this to the minimum number of signatories as possible.

Name	Role	Signature
	Service Provider	
	Service Level Management	
	Service Owner (if possible)	

1.2 Distribution List

Consider representation at appropriate levels from:

Business Budget Owner

IT Service Management

Service Owner (if defined)

Roles and responsibilities should be defined and agreed.

All those with a vested interest in the levels of service committed to the customer. If dedicated service owners exist then inclusion here or as signatories should be considered.

Name	Role
	Financial authority

1.3 Version History

Version	Reason for Amendment	Date

2 **Introduction**

2.1 **Purpose**

State the purpose of the document e.g.:

The purpose of this document is to ensure that Service Level Requirements are provided in a uniform manner to allow for the drafting of service level agreements and the initiation of a feasibility study before negotiation of the final agreement. It would be completed in collaboration between the business and IT.

2.2 **Scope**

State the scope of the document and to what it applies. Identify its limitations and assumptions.

3 **The Business:**

3.1 **Business Owner:**

[whoever is paying the costs for the Service]

3.2 **Business Signatory:**

[could be the same as above or designated signatory that accepts the costs]

3.3 **Customer Liaison:**

[bridge between Technical and the Business group]

3.4 **Escalation Contact # 1:**

[who takes the 1st escalation should an issue arise]

3.5 **Escalation Contact # 2:**

[2nd point of escalation should it be needed as alternative to contact #1 or more senior reporting]

3.6 **User Profile:**

[who are they, what do they do and what do they use the service for]

3.7 **Expected Number of Users & Location(s):**

[use this to define the number of users, their geographical location]

3.8 **Approvers/Stakeholders:**

[could be the owner (above) or the SLA signatory or other line of business that have a reliance on this service]

4 The Service: *<name of service>*

4.1 Service Catalogue Reference:

[If you use a Service Catalogue – a reference here adds clarity]

4.2 Service Name:

[what is the name of the Service being provided]

4.3 Service Start Date:

[if new – expected ‘go live’ date]

4.4 Service Description:

[describe Service Offerings)

4.4.1 Standard Services:

(e.g M – F 9 – 5, 2hr response to calls. Reports delivered daily etc ..)

4.4.2 Optional Services:

(extra options that will cost more e.g 7 x 24 with immediate response – other VIP options etc ..)

4.5 Service Provider (Where Known):

[Opportunity of choice if more than one supplier or nominate preferred supplier]

4.6 Service Days:

[Is this 7 x 24 or Mon – Fri or any other combination of days. Are there any CRITICAL days e.g. Month End or Year End]

4.7 Service Hours:

[Times can be displayed in LOCAL time as standard. Take care if the Service supplier and Service consumer are in different time zones – you will need to be clear on which Time Zone is being referred to]

4.7.1 Available Hours Requested:

[e.g 08:00 – 18:00 – this applies to the Service]

4.7.2 Support Hours Requested:

[e.g 08:00 – 18:00 – this applies to onsite support]

4.7.3 Critical Service Hours:

[e.g 11:00 – 14:00 – applies to time when service is MOST critical to the business]

4.8 Required Availability (in % terms e.g. 99.5%):

[expectations of the business partner – could be asked to look at 100% over critical periods but in general this is seen as a monthly target; it is also advisable to express the % in terms of actual hours and minutes]

4.9 Charging Method:

[e.g Internal cost centre or quarterly in advance (external)]

4.10 Acceptable Downtime:

[The amount of time agreed by the partners to the SLA. For example you may be allowed 30 minutes to Restore the Service when there is an intrusion/incident – but you may only be allowed 3 intrusions in a calendar month regardless of how quickly the Service is restored – this should be negotiated within the SLA targets]

4.10.1 Permitted Change Window:

[Business Initiated Changes]

4.10.2 Permitted Maintenance Window:

[IT Initiated Changes]

4.10.3 Permitted Release Window:

[can be same as change & maintenance. It may be possible to forecast the date/times for general releases within your company – e.g quarterly or 6 monthly)]

4.11 Service Tier: (Bronze, Silver, Gold, Platinum)

[If used – this can relate to Technical Support, Incident Management, Service Restoration Targets, Transaction Response times and Service Availability Targets. Values can vary for these depending on the service tier that is purchased – with upgrades available from the lower base]

4.12 Expected Service Capacity

[When writing the SLA, the number of users, location and data volumes etc is known. It is helpful to get a forecast on what the expected growth is for say 18 months. This will assist in planning the future capability as well as setting the benchmark from which you are being measured.]

4.13 Service Risk Category

[not a pre requisite but handy if known. What is the impact to the Business if this Service were not available for a given period of time.]

4.14 Security Requirements:

Physical:

Logical:

4.15 Business Continuity Restoral Priorities:

[Continuity requirements in the event of a disaster – if multiple services which one to restore 1st. If a single Service - Set expectations as to how quickly the Service needs to be restored – could be gleaned from the Risk category mentioned above]

5 Review and Report

5.1 Periodic Report Requirements:

[for example but not restricted to: Incidents & Problems related to this Service. Service Breaches (if any). Service Achievements (targets met, availability figure etc) – these reports will most likely be produced on a monthly cycle]

5.2 Real time performance and availability reporting requirements:

[possibly weekly reports showing service 'heatmaps' and current availability. These reports could be produced daily or weekly]

5.3 Service Performance Review Cycle:

[monthly/quarterly, parties involved and review method]

In all cases it is recommended that all reporting is carried automatically and posted to an internally published location. The reports contained in the repository may be referred to at will and collated as necessary in preparation for the planned review.

The SLA will be reviewed as standard on an annual basis.

Please indicate any variations to this here:

You may wish to align review requirement with your change processes and procedures – so it gets reviewed before, during or after a major change.

6 **SLR Signoff**

To indicate your concurrence, please enter your name and today's date in the space below with your reply to this message. This will serve as your electronic signature and agreement to begin the development of the SLA.

Service Level Manager:

Signature

Name

Date

Service Requestor:

Signature

Name

Date