# Baseline Applications and Deliverables Procedure

Continuous Performance Enablement

**Purpose**

When an SLA is requested for an application or deliverable, there will be a baseline period of six months. This is required to determine if the requested Service Target percentage can be met. If the baseline percentage is equal to or higher than the requested Service Target percentage, no action is required. If the baseline percentage is less than the requested Service Target percentage, the Service Target percentage will be changed to the baseline percentage.

The baseline calculation is as follows:

(Average nine-month baseline period percentage) + (lowest service percentage achieved during the nine-month baseline period) / 2.

For more information see:

[Service Level Management Process](O:\\Service Delivery\\Service Level Management\\SLA Information\\SLM documents for announcements\\SLA\\SLM_Service Level Management Process.doc)

**Related Policy**

* [IT Service Management Policy](https://sharepoint.jackson.com/sites/integrity/_layouts/15/WopiFrame.aspx?sourcedoc=%7be34fe42a-654a-469a-9d38-6612f00486dc%7d&action=view)

**Audience**

The following groups are responsible for adhering to this document:

* Continuous Performance Enablement

**Procedure**

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| --- | --- |
| Step | Action |
| 1 | Obtain the monthly SLA percentage of the applications / deliverables being baselined.  For more information see:  [Generate Monthly SLM Report Procedure](Generate%20Monthly%20SLM%20Report%20Procedure.docx)  [Create the Monthly KPI Status Report Procedure](Create%20the%20Monthly%20KPI%20Status%20Report.docx)  [Manually Monitor Services Procedure](../Monitoring%20Procedures/Manually%20Monitor%20Services%20Procedure.docx)  [Manually Monitor Deliverables Procedure](../Monitoring%20Procedures/Manually%20Monitor%20Deliverables%20Procedure.docx) |
| 2 | Access the *Baselined Services* spreadsheet located at:  [\\jacksonnational.com\GROUP\ITVOL1\VOL1\group\PM COE\Forecasting & Metrics Model Rollout\SLA Reporting\SLA Working Spreadsheet](file:///\\jacksonnational.com\GROUP\ITVOL1\VOL1\group\PM%20COE\Forecasting%20&%20Metrics%20Model%20Rollout\SLA%20Reporting\SLA%20Working%20Spreadsheet) |
| 3 | Add the previous month’s percentage to the corresponding cell on the spreadsheet.   1. Locate the current year’s tab in the spreadsheet.      1. Look for the “Currently being baselined” section.     ***Note:*** *There can be several different blocks of applications / deliverables being monitored at a time. These are separated by the nine-month period in which they are being baselined.*   1. Locate the application / deliverable that is being baselined and enter the previous month’s SLA percentage into the cell for that month.     ***Note:*** *The “9 Month Avg.” and “9 Month Baseline” will automatically update when the latest percentage is entered. The “9 Month Baseline” calculation may need to be updated if the percentage is lower than any of the other percentages that have been recorded for that application / deliverable. See* ***Appendix A*** *and* ***Appendix B*** *for more information.*   1. If the percentage is less than the “SLA Target” percentage, change the cell color to red. |
| 4 | Once the percentages for the nine-month baseline period have been recorded, verify the percentages are correct. See ***Appendix A*** and ***Appendix B*** for more information.   1. If the “9 Month Baseline” percentage is less than the “SLA Target” percentage, highlight the cell in yellow. 2. There is a comment section that you can add information to necessary. 3. Copy the cells for the finalized baselining and paste into an email. 4. Send an email to Service Level Management and the Director of IT Service Management. Ask them to let you know if the “SLA Target” percentage is to be changed for applications / deliverables that did not meet the expected target.   Service Level Management is expected to update the Service Target and the Agreement within the Remedy SLM system, as well as the Metric Data Definition and Service Level Matrix.   1. If the “SLA Target” percentage is to be updated, the following actions will need to be taken once Service Level Management has made their updates:    * Manually update the following field in the Master Record for the application / deliverable being changed.      + **Service Target** (only the last two digits should have changed).   For more information see:  [Master Record Documentation](../SLA%20Reporting%20Documentation/Master%20Record%20Documentation.docx)   * + Manually update the following fields in each Detail Record that exists for the current month in which the Service Target name was updated.     - **Service Target** (only the last two digits should have change).     - **Compliance Target** (at this time it can only be two digits).   ***Note:*** *Please note that if each Detail Record for the current month is not updated, the application / deliverable will appear twice on the SLM Report. Each entry will show a different “SLA Target” percentage.*  For more information see:  [Detail Record Documentation](../SLA%20Reporting%20Documentation/Detail%20Record%20Documentation.docx)   1. Cut the block of cells that contain the information for the application / deliverable that has completed the baselining period and paste it above the “Currently being baselined” cell. |
| 5 | Anytime a new application / deliverable is requested:   1. Copy an existing block of cells and paste below the “Currently being baselined” cell. 2. Update the “Application / Deliverable” name. 3. Update the “SLA Target” to the expected Service Target percentage for the new application / deliverable. 4. Remove the percentages from the cells below the month headers. 5. Leave the formula as is for the “9 Month Avg” and “9 Month Baseline” cells. The “9 Month Baseline” formula can be changed later when numbers are added to the spreadsheet. 6. Rename the months to match what the nine-month baseline period will be. |

**Appendix A – Nine- Month Average Calculation**

The nine-month average percentage of the application / deliverable that is being baselined is used in the calculation for the “9 Month Baseline” percentage.

The calculation is: =SUM(C2:K2)/9

* C = the ninth percentage being reported on.
* K – the first percentage that was being reported on.
* 2 – the row number in which the percentages appear
* /9 = divided by nine months.

**Appendix B – Nine-Month Baseline Calculation**

The calculation is : =SUM(L6+Lowest Percentage during the nine-month baseline period)/2

* L = the nine-month average calculation.
* +Lowest Percentage during the nine-month baseline period = use the lowest percentage that was recorded during the previous nine months.

This number may have to be updated if percentages decrease during the baseline period.

* /2 = divided by two.

**Modification**

The following associates can make modifications to this document:

* Manager, Service Level Management
* Director, IT Service Management
* Vice President, Service Delivery
* Chief Technology Officer, PGDS

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| Service Level Management Process | |
| Responsible Party: Sharla Piepkow, Manager, Service Level Management Approving Authority: Rob Kolm, Director, IT Service Management | Date Created: 08/23/2017 Last Modified: 05/19/2020 Last Reviewed: |