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Information technology — IT Enabled Services-Business Process Outsourcing (ITES-BPO) lifecycle processes —

Part 1:
Process reference model (PRM)

Technologies de l'information — Processus du cycle de vie de la délocalisation du processus d'affaires des services activés par IT —

Partie 1: Modèle de référence du processus (PRM)

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Foreword

ISO (the International Organization for Standardization) and IEC (the International Electrotechnical Commission) form the specialized system for worldwide standardization. National bodies that are members of ISO or IEC participate in the development of International Standards through technical committees established by the respective organization to deal with particular fields of technical activity. ISO and IEC technical committees collaborate in fields of mutual interest. Other international organizations, governmental and non-governmental, in liaison with ISO and IEC, also take part in the work.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of document should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives or www.iec.ch/members_experts/refdocs).

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This document was prepared by Joint Technical Committee ISO/IEC JTC 1, *Information technology*, Subcommittee SC 40, *IT service management and IT governance*.

This second edition cancels and replaces the first edition (ISO/IEC 30105-1:2016), which has been technically revised.

The main changes are as follows:

— terms and abbreviated terms that are used in this document and were previously defined in ISO/IEC 30105-4 have been added to this document;

— requirements for a process reference model have been clarified in 4.1;

— two new tactical enablement processes, TEN9 (Communication management) and TEN10 (Documentation management), have been added in order to align with ISO/IEC 20000-1 and ISO/IEC TS 33074;

— processes (e.g. context, purposes and outcomes) have been realigned to reflect updates in other documents, for example the impacts of change from ISO/IEC TR 20000-4 to ISO/IEC TS 33054, and updates to the ISO/IEC 33000 series, resulting in some outcomes no longer being required and new outcomes being added;

— editorial errors from the previous edition have been corrected.

A list of all parts in the ISO/IEC 30105 series can be found on the ISO and IEC websites.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html and www.iec.ch/national-committees.

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Introduction

IT Enabled Services-Business Process Outsourcing (ITES-BPO) services encompass the delegation of one or more IT enabled business processes to a service provider who uses appropriate technology to deliver that service. Such a service provider manages, delivers, improves and administers the outsourced business processes in accordance with predefined and measurable performance metrics. This covers diverse business process areas, such as human resource management, administration, healthcare, financial management, supply chain management, travel and hospitality, media, market research, data analytics, telecommunication, manufacturing, etc. ITES-BPO services provide business solutions to customers across the globe and form part of the core service delivery chain for customers.

The ISO/IEC 30105 series specifies the requirements for lifecycle processes performed by an ITES-BPO service provider. It defines the processes to plan, establish, implement, operate, monitor, review, maintain and improve its services. Key characteristics of the ISO/IEC 30105 series are as follows.

— It provides overarching guidance and requirements for all aspects of ITES-BPO industry from the view of the service provider that performs the outsourced business processes. This is applicable for any service provider providing services to customers through contracts and in industry verticals.

— It covers the entire outsourcing lifecycle and defines the processes that are considered to be good practices.

— It enables process capability gap determination and improvement for service providers performing outsourced business processes. It also serves as a process reference model (PRM) for service providers.

— It focuses on IT enabled business processes which are outsourced.

— It is generic and can be applied to all IT enabled business process outsourced services, regardless of type, size and the nature of the services delivered.

— Process improvement implemented using the ISO/IEC 30105 series can lead to clear return on investment for customers and service providers.

— Alignment to the ISO/IEC 30105 series can improve consistency, delivery quality and predictability in the delivery of services.

Figure 1 illustrates the key entities and relationships involved in an ITES-BPO service. This includes the customer, the service provider and various levels of suppliers. This is in line with the supply chain relationship depicted in ISO/IEC 20000-1:2018, 8.3.1. This document and ISO/IEC 20000-1 complement each other.

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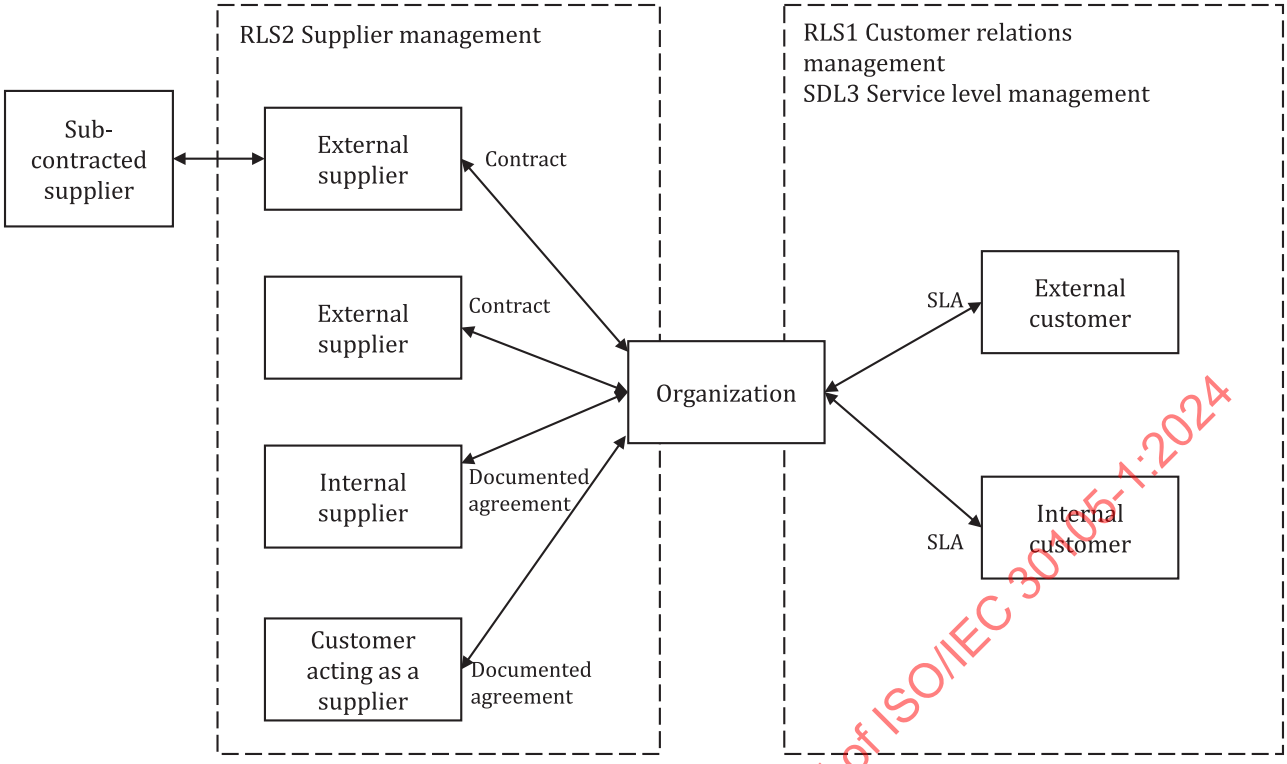

Key

RLS relationship

SDL service delivery

SLA service level agreement

Figure 1 — ITES-BPO key entities

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Information technology — IT Enabled Services-Business Process Outsourcing (ITES-BPO) lifecycle processes —

Part 1: Process reference model (PRM)

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1 Scope

The ISO/IEC 30105 series specifies the lifecycle process requirements performed by the IT enabled business process outsourcing service provider for the outsourced business processes. It defines the processes to plan, establish, implement, operate, monitor, review, maintain and improve its services.

This document specifies the process reference model (PRM). It contains process definitions across the lifecycle described in terms of process context, purpose and outcomes, together with a framework defining relationships between the processes.

The process purpose details the high-level objective of performing the process such that implementation of the process leads to tangible benefits for stakeholders. The process outcomes are clearly defined by observable results and aligned to the business benefits derived by the customer and service provider.

This document:

— covers IT enabled business processes that are outsourced;

— is not intended to address IT processes, but includes references to them at key touchpoints for completeness;

— is applicable to the service provider, not to the customer;

— is applicable to all lifecycle processes of ITES-BPO;

— serves as a PRM for organizations providing ITES-BPO services.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO/IEC 20000-10, *Information technology — Service management — Part 10: Concepts and terminology*

ISO/IEC 33001, *Information technology — Process assessment — Concepts and terminology*

ISO/IEC 33004:2015, *Information technology — Process assessment — Requirements for process reference, process assessment and maturity models*

3 Terms, definitions and abbreviated terms

For the purposes of this document, the terms and definitions given in ISO/IEC 20000-10, ISO/IEC 33001 and the following apply.

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ISO and IEC maintain terminology databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at https://www.electropedia.org/

3.1 Terms and definitions

3.1.1
business continuity
capability of the *organization* (3.1.6) to continue the delivery of products and services within acceptable time frames at predefined capacity to predefined performance levels during a period of disruption

[SOURCE: ISO 22301:2019, 3.3, modified — "at predefined capacity during a disruption" has been changed to "at predefined capacity to predefined performance levels during a period of disruption" in the definition.]

3.1.2
business process
collection of related, structured activities that produce a specific service or product for a particular customer

[SOURCE: ISO/IEC 30105-4:2022, 3.1.3]

3.1.3
infrastructure
hardware, software, working environment and controls to support *business process* (3.1.2) outsourcing

[SOURCE: ISO/IEC 30105-4:2022, 3.1.6]

3.1.4
innovation
new or changed entity, realizing or redistributing value

Note 1 to entry: Value is relative to, and determined by, the perception of the *organization* (3.1.6) and relevant interested parties.

Note 2 to entry: An innovation can be a product, service, *process* (3.1.9), model, method, etc.

Note 3 to entry: Innovation is an outcome. The word “innovation” sometimes refers to activities or processes resulting in, or aiming for, innovation. When “innovation” is used in this sense, it should always be used with some form of qualifier, e.g. “innovation activities”.

Note 4 to entry: For the purpose of statistical measurement, see Reference [16].

[SOURCE: ISO 56000:2020, 3.1.1, modified — “novelty” in Note 1 to entry has been removed. Reference to Annex B of the source document has been removed in Note 4 to entry.]

3.1.5
knowledge transfer
structured approach for imparting pre-existing or acquired learning, to a team or a person, to help them attain defined levels of knowledge or skill

3.1.6
organization
person or group of people that has its own functions with responsibilities, authorities and relationships to achieve its objectives

Note 1 to entry: The concept of organization includes, but is not limited to sole-trader, company, corporation, firm, enterprise, authority, partnership, charity or institution, or part or combination thereof, whether incorporated or not, public or private.

[SOURCE: ISO/IEC 20000-1:2018, 3.1.14, modified — Note 2 to entry, Note 3 to entry and Note 4 to entry have been removed.]

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3.1.7
outsourcing
business model for the delivery of a product or services to a customer by a provider

Note 1 to entry: Outsourcing is an alternative to the provision of those products or services within the customer *organization* (3.1.6), where:

— the outsourcing *process* (3.1.9) is based on a sourcing decision (make or buy);

— resources can be transferred to the provider;

— the provider is responsible for the product or service for an agreed period of time;

— the accountability for delivery outcomes is owned by the customer and the provider is responsible for performing the services.

[SOURCE: ISO 37500:2014, 3.10, modified — "client" has been changed to "customer" in the definition, and Note 1 to entry has been added.]

3.1.8
preventive action
action to eliminate the cause of a potential nonconformity or other potential undesirable situation

Note 1 to entry: There can be more than one cause for a potential nonconformity.

Note 2 to entry: Preventive action is taken to prevent occurrence whereas corrective action is taken to prevent recurrence.

[SOURCE: ISO 9000:2015, 3.12.1]

3.1.9
process
set of interrelated or interacting activities that use inputs to deliver an intended result

Note 1 to entry: Whether the "intended result" of a process is called output, product or service depends on the context of the reference.

Note 2 to entry: Inputs to a process are generally the outputs of other processes and outputs of a process are generally the inputs to other processes.

Note 3 to entry: Two or more interrelated and interacting processes in series can also be referred to as a process.

Note 4 to entry: Processes in an *organization* (3.1.6) are generally planned and carried out under controlled conditions to add value.

Note 5 to entry: A process where the conformity of the resulting output cannot be readily or economically validated is frequently referred to as a "special process".

Note 6 to entry: This constitutes one of the common terms and core definitions for ISO management system standards given in Annex SL of the Consolidated ISO Supplement to the ISO/IEC Directives, Part 1. The original definition has been modified to prevent circularity between process and output, and Notes 1 to 5 to entry have been added.

[SOURCE: ISO 9000:2015, 3.4.1]

3.1.10
process outcome
observable result of the successful achievement of the *process* (3.1.9) purpose

Note 1 to entry: An outcome statement describes one of the following: production of an artefact; a significant change in state; meeting of specified constraints, e.g. requirements, goals, etc.

[SOURCE: ISO/IEC 33001:2015, 3.3.11]

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3.1.11
process reference model
model comprising definitions of *processes* (3.1.9) in a domain of application, described in terms of process purpose and outcomes, together with an architecture describing the relationships between the processes

[SOURCE: ISO/IEC 33001:2015, 3.3.16]

3.1.12
transition in
activities for migrating agreed upon knowledge, assets, liabilities, systems, *processes* (3.1.9) and people from the customer to the provider or back in-house, in order to create desired delivery capability

[SOURCE: ISO 37500:2014, 3.24]

3.1.13
transition out
activities for migrating agreed upon knowledge, assets, liabilities, systems, *processes* (3.1.9) and people from one service provider to another, or back in-house, enabling the customer to change service provider or service solution

[SOURCE: ISO/IEC 30105-4:2022, 3.1.26]

3.1.14
value chain
entire sequence of activities or parties that create or receive value through the provision of a product or service

[SOURCE: ISO 14050:2020, 3.5.28, modified — "or service" has been added to the definition.]

3.1.15
work environment
set of conditions under which work is performed

Note 1 to entry: Conditions can include physical, social, psychological and environmental factors (such as temperature, lighting, recognition schemes, occupational stress, ergonomics and atmospheric composition).

[SOURCE: ISO 9000:2015, 3.5.5]

3.2 Abbreviated terms

ITES-BPO	IT Enabled Services-Business Process Outsourcing
MF	measurement framework
OEN	operational enablement
OMM	organization maturity model
PA	process attribute
PAM	process assessment model
PRM	process reference model
RLS	relationship
SDL	service delivery
SEN	strategic enablement
SLA	service level agreement

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SLN	solution
TEN	tactical enablement
TRN	transition in
TRO	transition out

4 Overview of process reference model (PRM)

4.1 Requirements for a PRM

In accordance with ISO/IEC 33004:2015, 5.4, processes included in a PRM shall satisfy the following requirements:

a) descriptions shall contain the process purpose and process outcomes;

b) the set of process outcomes shall be necessary and sufficient to achieve the purpose of the process;

c) process descriptions shall not contain or imply aspects of the process quality characteristic beyond the lowest level of its intended measurement scale.

Annex A provides details of the PRM's conformity to ISO/IEC 33004.

4.2 Descriptive elements of the PRM

Each process in the PRM has the following descriptive elements.

a) **Name**: the name of a process is a short noun phrase that summarizes the scope of the process, identifying the principal concern of the process, and distinguishes it from other processes within scope of the process reference model.

b) **Context**: for each process, a brief overview describes the intended context of the application of the process.

c) **Purpose**: the purpose of the process is a high-level and overall goal for performing the process.

d) **Outcomes**: an outcome is an observable result of the successful achievement of the process purpose. Outcomes are assessable, measurable, tangible technical or business results that are achieved by a process.

Figure 2 shows the process categories of the process assessment model for ITES-BPO. It includes the strategic enablement, relationship, and tactical and operational processes which support the outsourced business across its lifecycle.

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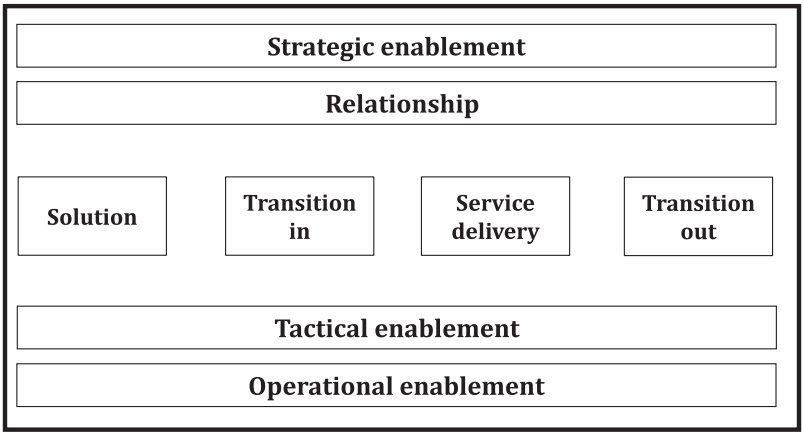

Figure 2 — ITES-BPO lifecycle process categories

4.3 Process reference model categories

The ITES-BPO process categories are as follows.

— **Strategic enablement processes**: involve a set of processes related to setting strategic directions and bringing innovation such as breakthrough changes.

— **Relationship processes**: cover the relationship management of the service provider with the customer and the suppliers.

— **Solution processes**: include details on how the ITES-BPO solution is envisaged and the contract is developed and managed.

— **Transition in processes**: cover the movement of business process delivery from the customer to the service provider, establishing the required management, people and infrastructure capability, and concluding with piloting the transitioned service.

— **Service delivery processes**: include all the processes that are required for the day-to-day management and delivery of ITES-BPO services.

— **Transition out process**: covers the movement of the business process delivery back to the customer or to a different service provider.

— **Tactical enablement processes**: involve a set of processes that enable achievement of the objectives of the core service delivery processes. These are tactical in nature.

— **Operational enablement processes**: involve a set of processes that ensure day–to-day operations of service delivery are supported and are performed alongside the service delivery processes.

Figure 3 shows process categories and processes in the ITES-BPO lifecycle.

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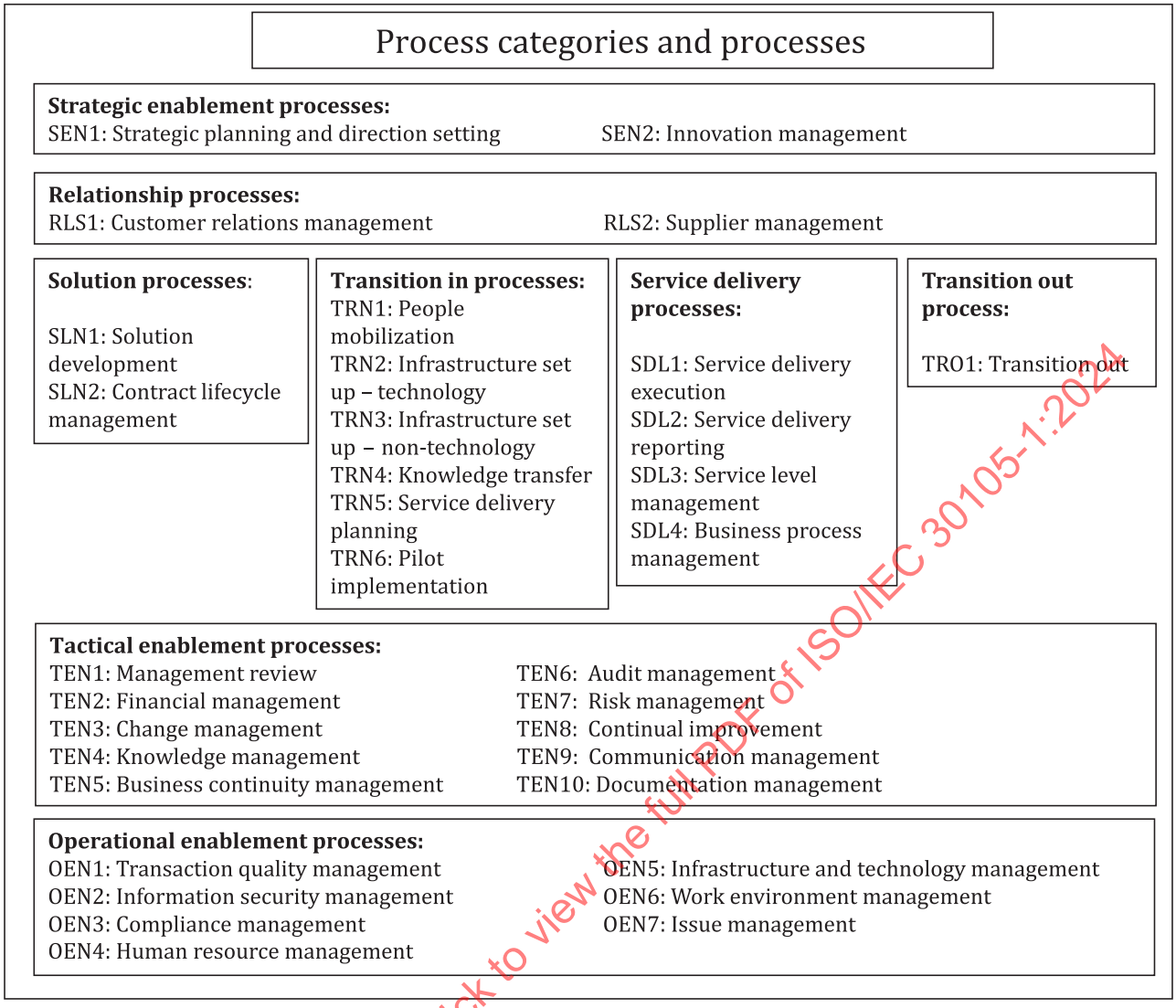

Figure 3 — ITES-BPO lifecycle process categories and processes

The ITES-BPO processes and the categories described in Figure 3 are not based on any particular service provider and it is not mandatory to implement them.

The purpose of a process reference model is to define a set of processes that can collectively support the primary aims of a community of interest. A process reference model can provide the basis for one or more process assessment models.

Figure 4 shows the relationship between the assessment process, PRM, PAM, MF and OMM that enable process capability assessment and organization maturity determination.

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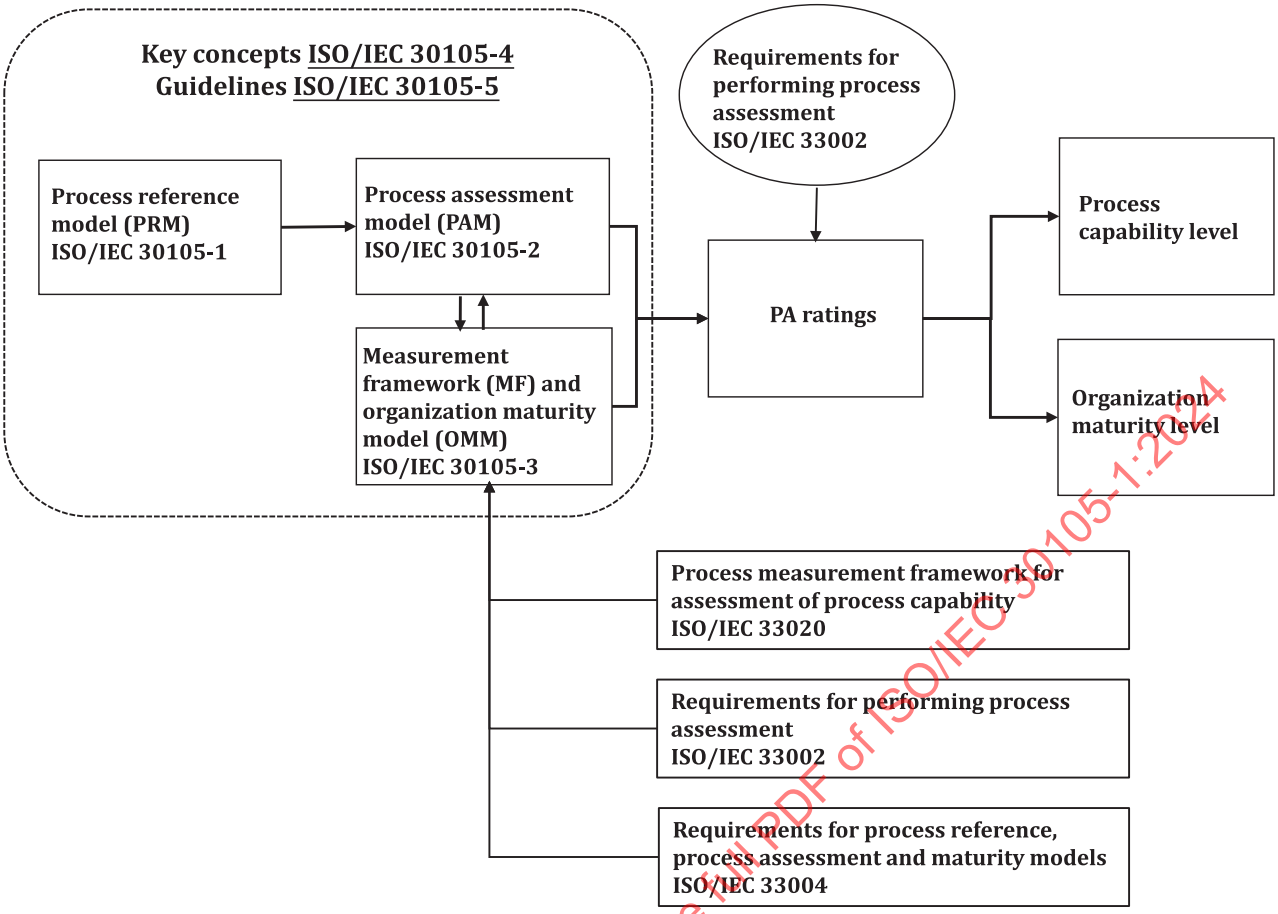

Figure 4 — Interrelationship between ISO/IEC 30105 and ISO/IEC 33000 series

5 Process reference model description

5.1 Strategic enablement processes

This process category is intended to lead the organization towards the achievement of business objectives by providing resources and direction and achieving customer satisfaction. There are two processes under this category:

a) SEN1: Strategic planning and direction setting (Table 1);

b) SEN2: Innovation management (Table 2).

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Table 1 — SEN1 Strategic planning and direction setting

Name	Strategic planning and direction setting
Context	This process covers establishing business objectives and strategies for the service provider. This involves analysing the external environment and finalizing the strategic goals. It includes defining the market, developing the offerings, building the strategic assets and preparing the organization for service delivery in line with the business objectives of the service provider.
Purpose	The purpose of the SEN1 process is to define and share business objectives, strategies and organizational roadmaps for achieving strategic goals.
Outcomes	As a result of the successful implementation of this process: a) business objectives, direction and strategies are defined and shared to the organization and relevant stakeholders; b) business objectives, direction and strategies are defined for the service offerings of the service provider; c) implementation plans are defined to achieve business objectives, direction and strategies; d) strategic roadmaps are developed within the constraints of the service provider resources; e) commitment and leadership with respect to the business is demonstrated; f) digital vision and strategy are outlined, defining the role and approach for using digital technologies within the ITES-BPO organization.

Table 2 — SEN2 Innovation management

Name	Innovation management
Context	This process covers the new or different ways of delivering improved and enhanced services for the benefit of the customer and service provider. Innovation differs from improvement in that innovation refers to an organization performing differently rather than doing the same thing better.
Purpose	The purpose of the SEN2 process is to plan and implement programmes to make major changes to business processes leading to significant benefits by deploying innovation.
Outcomes	As a result of the successful implementation of this process: a) an innovation framework is created at an organization level; b) a measurement framework is established; c) a deployment strategy is defined at an organization and process level; d) the major change (innovation) is executed and progress is monitored and reviewed against expected outcomes; e) the customer organization is involved as appropriate; f) progress is communicated to stakeholders.

5.2 Relationship processes

This process category establishes processes for managing customers and suppliers to ensure that objectives are aligned and that their relationships are managed.

There are two processes under this category:

a) RLS1: Customer relations management (Table 3);

b) RLS2: Supplier management (Table 4).

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Table 3 — RLS1 Customer relations management

Name	Customer relations management
Context	This process covers the management of customer relations, and it includes the definition, understanding and management of agreed customer requirements, measurement of customer satisfaction, management of customer complaints and/or escalations, and overall management of the well-being of the relationship.
Purpose	The purpose of the RLS1 process is to identify and manage customer relations, including the management of customer requirements and customer expectations to improve the level of customer satisfaction.
Outcomes	As a result of the successful implementation of this process: a) requirements and expectations of all customers, service users and other interested parties are identified, reviewed and agreed upon; b) customer satisfaction is collected, recorded and measured; c) customer escalations, complaints and actions taken are recorded, tracked and resolved; d) actions to improve customer satisfaction are identified, recorded and tracked until closure.

Table 4 — RLS2 Supplier management

Name	Supplier management
Context	This process covers the engagement between the service provider and their suppliers. It ensures that commitments are in line with customer requirements. It enables the service provider to manage suppliers to meet their contractual obligations and commitments. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the RLS2 process is to select and manage suppliers to provide the required service in accordance with relevant requirements.
Outcomes	As a result of the successful implementation of this process: a) suppliers are selected for specific services according to the identified criteria; b) services to be provided are defined and negotiated with each supplier; c) roles and relationships between suppliers are determined; d) supplier obligations to meet requirements, including security and privacy standards, are monitored and managed; e) supplier performance against agreed criteria is monitored and managed; f) service level requirements remain in line with overall committed customer needs or are actively managed where not; g) the supply chain is fully integrated; h) supplier risks are identified; i) a supply value chain is established to improve customer satisfaction.

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5.3 Solution processes

This process category enables the development of feasible solutions, including the transition approach, service delivery, risk management, information security and business continuity. A suitable solution can lead to development, negotiation and agreement of the contract.

There are two processes under this category:

a) SLN1: Solution development (Table 5);

b) SLN2: Contract lifecycle management (Table 6).

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Table 5 — SLN1 Solution development

Name	Solution development
Context	This process covers the development of a solution to meet customer requirements.
Purpose	The purpose of the SLN1 process is to develop solutions that meet the identified customer requirements within known constraints.
Outcomes	As a result of the successful implementation of this process: a) customer requirements and known constraints are defined; b) a project plan is developed for transition and delivery of the required outsourced business processes; c) solutions are identified for the transition and the delivery of services that meet agreed current and future business needs; d) customer success criteria are clearly defined; e) solutions are formally accepted by the customer.

Table 6 — SLN2 Contract lifecycle management

Name	Contract lifecycle management
Context	This process covers the negotiation, renegotiation, agreement and ongoing management of contractual requirements between the customer and service provider.
Purpose	The purpose of the SLN2 process is to develop, agree and manage a contract, including mutually agreed terms and conditions against which the contracting parties perform their obligations.
Outcomes	As a result of the successful implementation of this process: a) goals and objectives of the contracting parties are aligned; b) obligations of the contracting parties are agreed upon; c) risks are clarified and agreed upon between the contracting parties; d) mutually satisfactory due diligence is achieved; e) service level and customer satisfaction targets are agreed upon; f) contracts are accepted and signed by contracting parties; g) contract changes are assessed, recorded, tracked and actioned; h) expirations and renewals are assessed, recorded, tracked and actioned; i) metrics are measured, alignment to all contracted targets is assessed and corrective action is put in place to address any deviations.

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5.4 Transition in processes

This process category enables a business process to migrate from a customer or their incumbent supplier to a new service provider. This requires seamless transfer of knowledge, service set-up and effective project management to ensure that services are available and service levels are achieved in line with contracted service requirements.

There are six processes under this category:

a) TRN1: People mobilization (Table 7);

b) TRN2: Infrastructure set-up — technology (Table 8);

c) TRN3: Infrastructure set-up — non-technology (Table 9);

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d) TRN4: Knowledge transfer (Table 10);

e) TRN5: Service delivery planning (Table 11);

f) TRN6: Pilot implementation (Table 12).

Table 7 — TRN1 People mobilization

Name	People mobilization
Context	This process covers the provision of sufficient experienced human resources capacity and capability to meet the service delivery requirements. It involves identification, sourcing, selection, recruitment, training and ongoing development of people with the skills, experience and capabilities in the right numbers to meet the contracted service delivery requirements. Sourcing may include recruitment or the transfer of employees from any existing pool of resources. Where this transfer is between organizations, this will be in line with relevant laws and regulations.
Purpose	The purpose of the TRN1 process is to mobilize the required number of people with the required skills and experience to meet the identified service delivery requirements and the transition timescales.
Outcomes	As a result of the successful implementation of this process: a) required human resource levels and skill sets are determined based on agreed solutions; b) human resources are identified and recruited to meet requirements; c) human resources requirements mandated by the customer are verified; d) induction activities are completed within the transition timescales; e) skill sets of transferring resources are verified; f) skill sets are enhanced to meet service delivery requirements; g) continual professional development requirements are identified and assessed, recorded, tracked and met; h) transfer of employees is managed in line with relevant regulatory requirements; i) delivery organization structures, roles and responsibilities and competencies are defined and communicated; j) people mobilization activities are accepted by the customer in accordance with the acceptance criteria; k) cross-functional and multi-skilled teams are created within the organization optimizing sourcing options.

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Table 8 — TRN2 Infrastructure set-up — technology

Name	Infrastructure set-up — technology
Context	This process covers the planning, design, validation, testing and implementation of technology infrastructure requirements for customer service delivery in line with contractual obligations. Technology infrastructure requirements include connectivity, access to service delivery applications, provision of hardware and software for service delivery, and information technology-related controls, as required by the customer organization.
Purpose	The purpose of the TRN2 process is to set up the technology infrastructure to meet the service delivery requirements.
Outcomes	As a result of the successful implementation of this process: a) technology infrastructure requirements, as appropriate, are identified, planned, validated, tested and implemented in line with the service delivery requirements and transition plan; b) technology infrastructure requirements are implemented and configured in line with security and compliance requirements, limiting access to authorized persons based on role provisioning and authorization; c) performance relating to the technology infrastructure is defined, measured, reviewed, improved and reported; d) technology infrastructure is agreed upon by the customer in accordance with the acceptance criteria; e) emerging technology is evaluated and appropriately applied to meet service delivery needs.

Table 9 — TRN3 Infrastructure set-up — non-technology

Name	Infrastructure set-up — non-technology
Context	This process covers the planning, design, validation, testing and implementation of the non-technology infrastructure requirements for service delivery in line with contractual obligations. Non-technology infrastructure requirements include, but are not be limited to: office space, furniture, transportation, cafeteria, health and safety, and corporate social responsibility requirements to meet the customer service delivery requirements. This also includes requirements for special working arrangements such as transport, cafeteria, medical and other support services during non-standard working hours.
Purpose	The purpose of the TRN3 process is to set up the non-technology infrastructure to meet the service delivery requirements.
Outcomes	As a result of the successful implementation of this process: a) non-technology infrastructure requirements are identified in line with service delivery requirements and a transition plan; b) non-technology infrastructure is planned, selected and implemented in line with service delivery requirements; c) non-technology infrastructure is tested and validated in line with service delivery requirements; d) non-technology facilities for special working arrangements are established; e) non-technology infrastructure is agreed upon by the customer in accordance with the acceptance criteria.

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Table 10 — TRN4 Knowledge transfer

Name	Knowledge transfer
Context	This process covers the assessment, documentation and transfer of knowledge of the customer's business processes, operating model and data to the service delivery organization to meet the service delivery requirements.
Purpose	The purpose of the TRN4 process is to ensure the knowledge of business processes, operations and information gets transferred between the customer's organization or current service provider and the new service provider.
Outcomes	As a result of the successful implementation of this process: a) the scope of required knowledge is identified; b) the knowledge transfer plan is defined; c) required knowledge assets are created; d) human resources attain the required knowledge to deliver the service; e) knowledge transfer completion is agreed upon by the customer and the service provider in accordance with the acceptance criteria.

Table 11 — TRN5 Service delivery planning

Name	Service delivery planning
Context	This process covers the creation of the service delivery framework used to manage the delivery of service. This is a continuous process and will occur throughout the solution lifecycle from initial planning, through solution design and service transfer, into ongoing service delivery across all key elements of the solution such as process, people, technology infrastructure and non-technology infrastructure. This process focuses on the initial planning stage. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the TRN5 process is to establish an operational delivery and governance plan for service delivery.
Outcomes	As a result of the successful implementation of this process: a) human resource management is planned and established; b) business process management is planned and established; c) infrastructure — technology is planned and established; d) infrastructure — non-technology is planned and established; e) financial, operations, risk, business continuity, security, compliance and improvement plans are established; f) metrics and measurement systems are established; g) communication and governance mechanisms are established to provide monitoring, review, joint decision making and issue resolution; h) a service delivery plan is agreed upon by the customer in accordance with the acceptance criteria.

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Table 12 — TRN6 Pilot implementation

Name	Pilot implementation
Context	This process covers the testing and validation of service delivery performance and capability by the service provider.
Purpose	The purpose of the TRN6 process is to verify the solution design in a safe environment before deployment of a full-scale service delivery solution.
Outcomes	As a result of the successful implementation of this process: a) a pilot plan and pilot success criteria are defined; b) human resource management and knowledge transfer is tested; c) business process management is tested; d) infrastructure — technology is tested; e) infrastructure — non-technology is tested; f) financial, operations, risk, security, compliance, change, issue and improvement plans are tested; g) business continuity plans are tested; h) operations are tested; i) piloted service level performance and volumes are verified; j) customer feedback is recorded and corrective actions are tracked to closure; k) pilot completion and new or changed service deployment are agreed upon by the service provider in accordance with the acceptance criteria.

5.5 Service delivery processes

This process category enables the management and execution of a customer's business processes on a day-to-day basis as an extension of the customer's business, in line with the defined processes to meet the agreed service levels, with required service reporting.

There are four processes under this category:

a) SDL1: Service delivery execution (Table 13);

b) SDL2: Service delivery reporting (Table 14);

c) SDL3: Service level management (Table 15);

d) SDL4: Business process management (Table 16).

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Table 13 — SDL1 Service delivery execution

Name	Service delivery execution
Context	This process covers the management and achievement of the expected service delivery results. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the SDL1 process is to manage, operate and control ongoing service delivery to achieve the desired performance levels.
Outcomes	As a result of the successful implementation of this process: a) roles and responsibilities for delivering services are maintained and assigned; b) daily operations are controlled; c) service delivery is monitored against operational performance targets; d) a governance framework is implemented; e) performance of daily operations is communicated to relevant stakeholders; f) service delivery plans are reviewed and maintained in line with service changes and customer feedback.

Table 14 — SDL2 Service delivery reporting

Name	Service delivery reporting
Context	This process covers the provision of quantitative and qualitative information to enable the service provider to report the service performance. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the SDL2 process is to produce timely and accurate service reports to support effective communication and to make informed decisions.
Outcomes	As a result of the successful implementation of this process: a) service delivery reporting needs are identified; b) service delivery reports are produced, according to service report requirements, which are understandable and provide effective business support; c) service delivery reports are communicated to relevant stakeholders; d) improvement actions are identified and reported; e) service delivery reports are reviewed and maintained in line with service changes and customer feedback; f) decisions are made based on quantifiable and accurate reported performance data.

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Table 15 — SDL3 Service level management

Name	Service level management
Context	The process covers the definition, measurement and monitoring of service performance characteristics to enable delivery of the service to meet the agreed service level targets of the customer. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the SDL3 process is to ensure that the agreed service level targets are met.
Outcomes	As a result of the successful implementation of this process: a) service level targets, workload characteristics and exceptions for services are defined in SLAs; b) service performance is monitored against SLAs; c) corrective and preventive actions are identified and tracked to closure in order to avoid or correct them according to service level performance deviations.

Table 16 — SDL4 Business process management

Name	Business process management
Context	This process covers the control and delivery of the outsourced business processes.
Purpose	The purpose of the SDL4 process is to manage the delivery of business processes, aligned to customer requirements and related external requirements, leading to consistency, reliability, quality, efficiency, effectiveness, continual improvement and regulatory compliance.
Outcomes	As a result of the successful implementation of this process: a) business processes are defined and implemented in accordance with customer requirements; b) business process objectives and service delivery objectives are aligned; c) performance of business processes is monitored, reviewed, controlled; d) corrective actions are taken when necessary and tracked to closure; e) business processes perform in alignment with service level and customer satisfaction targets; f) business process performance is communicated to stakeholders.

5.6 Transition out process

This process category enables the migration of a process from the current service provider delivery to that of the customer or an alternative service provider. This includes human resources, processes, technology and knowledge, ensuring continued service to the customer during the transition period.

There is one process under this category, TRO1: Transition out (Table 17).

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Table 17 — TRO1 Transition out

Name	Transition out
Context	This process covers the transfer of business process delivery from the service provider to another service provider or back to the customer, including human resources, processes, technology and knowledge. It ensures continued service to the customer during the transition period in which the service provider is changed.
Purpose	The purpose of the TRO1 process is to transfer the services, in part or full, to another service provider or back to the customer to meet defined business requirements and contractual commitments.
Outcomes	As a result of the successful implementation of this process: a) requirements and known constraints are defined; b) project plans for the transitioning out of the identified business processes are defined; c) modified service delivery plans are formally accepted by the customer; d) customer success criteria are clearly defined; e) knowledge is transferred; f) people, technology and non-technology assets are transferred or transitioned as defined in the contract; g) process interfaces are assessed and redefined; h) service performance is maintained to agreed levels during service transition out; i) transition out progress is communicated to relevant stakeholders; j) transition out is agreed upon by the customer and both the incumbent and new service provider in accordance with the acceptance criteria.

5.7 Tactical enablement processes

This process category enables the management, assurance and improvement of service delivery. This is achieved through a set of key processes that underpin seamless and effective delivery, and alignment to business needs, including financial, risk, knowledge, change, communication, documentation control, business continuity, audit, review and improvement aspects.

There are ten processes under this category:

a) TEN1: Management review (Table 18);

b) TEN2: Financial management (Table 19);

c) TEN3: Change management (Table 20);

d) TEN4: Knowledge management (Table 21);

e) TEN5: Business continuity management (Table 22);

f) TEN6: Audit management (Table 23);

g) TEN7: Risk management (Table 24);

h) TEN8: Continual improvement (Table 25);

i) TEN9: Communication management (Table 26);

j) TEN10: Documentation management (Table 27).

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Table 18 — TEN1 Management review

Name	Management review
Context	This process covers the periodic review by management of the business performance of the outsourced service. The review will consider progress against the business plan and business objectives with respect to each element of the business, including the customer relationship, process, human resources, infrastructure, technology, risks, financials and general contractual terms. This can lead to improved customer satisfaction and organizational efficiency and effectiveness. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the TEN1 process is to assess the business performance of the outsourced service provider and to identify and make decisions regarding potential improvements.
Outcomes	As a result of successful implementation of this process: a) the objectives of the review are established; b) the status and performance against the business plan, identified activity or process are assessed in terms of the established objectives; c) risks, problems and opportunities for improvement are identified.

Table 19 — TEN2 Financial management

Name	Financial management
Context	This process covers the budgeting, accounting, monitoring and management of costs for the service provider's organization and the activities to drive cost effective usage of resources. This also includes decision making on pricing for service delivery.
Purpose	The purpose of the TEN2 process is to acquire and sustain the appropriate level of funding to design, develop and deliver services that meet the strategy of the organization and agreed customer requirements.
Outcomes	As a result of the successful implementation of this process: a) the cost to design, develop and deliver services is understood in accordance with the strategy of the organization and agreed customer requirements and communicated to relevant stakeholders; b) the funds required to provide the services are obtained; c) pricing, costs and incomes are monitored and reported to relevant stakeholders; d) the relationship between cost and incomes and their variance is identified; e) the costs of service provision are recovered; f) clear and justifiable invoices are produced; g) investment strategy is established to support the organization's strategic and innovation objectives; h) investment performance is managed, and financial risk for initiatives is identified and managed.

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Table 20 — TEN3 Change management

Name	Change management
Context	This process covers changes to services and service components. The changes are planned and controlled to ensure timeliness without unnecessary disruption. Unintended effects of changes are remedied. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the TEN3 process is to ensure that all changes are assessed, approved and implemented in a controlled manner.
Outcomes	As a result of the successful implementation of this process: a) change requests are recorded, classified and prioritized; b) change requests are analysed; c) criteria for evaluating changes are defined; d) changes are evaluated and approved using defined criteria; e) an implementation schedule of changes and releases is communicated to relevant stakeholders; f) changes that meet defined criteria are implemented and verified; g) changes that do not meet defined criteria are reversed or remedied.

Table 21 — TEN4 Knowledge management

Name	Knowledge management
Context	This process covers recording, retaining and maintaining the knowledge and expertise for delivering the service throughout the life of the contracted service.
Purpose	The purpose of the TEN4 process is to create, disseminate and leverage knowledge and intellectual property based on the contract with the customer.
Outcomes	As a result of the successful implementation of this process: a) knowledge assets are identified, classified, maintained and controlled; b) knowledge assets are verified and agreed upon by the stakeholders, in accordance with acceptance criteria; c) business process knowledge and delivery capabilities are assessed and identified gaps are addressed to meet service delivery requirements; d) knowledge assets are available and used throughout the service lifecycle.

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Table 22 — TEN5 Business continuity management

Name	Business continuity management
Context	This process covers the ITES-BPO service provider ensuring adequate capability is established to respond to unplanned disruptions in a proactive, structured and planned manner, thereby ensuring continuity of services at agreed levels. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the TEN5 process is to ensure continuity of business services during and after disruptions to agreed service levels.
Outcomes	As a result of the successful implementation of this process: a) business continuity requirements and plans are defined; b) disaster recovery plans are defined; c) preventive measures to avoid invocation of continuity measures, including facilities and work environment controls are identified; d) alternative means of operation of critical processes are defined and invoked, when needed; e) risks or potential disruptions in business continuity are analysed and minimized; f) event status updates on disruption and alternate means of operations are communicated to relevant stakeholders; g) agreed business continuity service levels are maintained during disruption and normal service levels are returned to after disruption; h) business continuity plans and disaster recovery plans are regularly tested; i) continuity measures and plans are communicated to stakeholders.

Table 23 — TEN6 Audit management

Name	Audit management
Context	This process covers the examination of the defined process areas to determine if they are effectively established, maintained, and conform to the requirements for service delivery. Planning for an audit takes into account the importance of the services, processes and areas to be audited, and the results of previous audits. It is performed by independent competent auditors at a defined frequency. Adherence to the principles of auditing such as ethical conduct, fair presentation, due professional care, independence and evidence-based approach is assumed. This process covers all of the other 33 process areas. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the TEN6 process is to independently determine conformity of services and processes to the requirements, policies, plans and agreements, as appropriate.
Outcomes	As a result of the successful implementation of this process: a) the scope and purpose of each audit is defined; b) the objectivity and impartiality of the conduct of audits and selection of auditors are assured; c) conformity of selected services and processes with requirements, plans and agreements is determined; d) non-conformities are recorded; e) non-conformities are communicated to those responsible for corrective actions and resolutions; f) corrective actions for non-conformities are verified.

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Table 24 — TEN7 Risk management

Name	Risk management
Context	This process covers the identification, assessment and control of risks related to delivering customer services. It applies to all processes across the ITES-BPO lifecycle, including resourcing, technology, infrastructure, information security, business continuity, compliance and change management. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the TEN7 process is to identify, analyse, evaluate, mitigate and monitor the risks.
Outcomes	As a result of successful implementation of this process: a) criteria for the assessment of risks and the acceptable level of risk are identified; b) risks are identified; c) identified risks are analysed; d) risks are evaluated against defined criteria; e) risks are selected for treatment; f) selected risks are treated.

Table 25 — TEN8 Continual improvement

Name	Continual improvement
Context	This process covers the practice of continual improvement which is essential to a successful organization. Improvement projects include process analysis, prioritization and deployment of value adding changes and evaluating their effectiveness. NOTE This is similar to the category of the same name in ISO/IEC TS 33054, but aligned to requirements of ITES-BPO.
Purpose	The purpose of the TEN8 process is to manage the identification, analysis, prioritization and implementation of continual improvements.
Outcomes	As a result of the successful implementation of this process: a) improvement opportunities are identified and analysed; b) continual improvement programmes are planned and implemented; c) specific objectives and goals for the programme are selected based on priority and value added; d) programmes are executed, monitored and reviewed against objectives; e) the effectiveness of implemented improvements is evaluated; f) the customer organization is involved as appropriate.

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