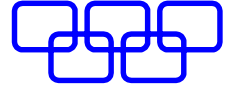**RL Consulting**

People • Process • Technology
Organization • Integration

IT Service Management

Service Outsourcing Questionnaire

Prepared by:
Rick Leopoldi
November 10, 2003

Management Questionnaire

Company:
Name:
Job Title:
Location:
Contact Telephone Number:
Email Id:
No. Years as Employee:
No. Years in IT:
Career Background/Experience:
Current Responsibilities:

Interviewer:
Date:

People • Process • Technology
Organization • Integration

About this Questionnaire

The objective of this questionnaire is to gather information to qualify and scope the opportunity for a Managed Service. Information gathered may ultimately form part of a Statement of Work, a Contract, or a Statement of Intent or Direction. It will enable and understanding of the customer's Managed Service requirements in the following areas:
- What the customer is trying to achieve
- What is being delivered today
- How the current service is measured
- The interfaces into the current service
- The resources we will need in order to take over the current service

The questionnaire is intended to provide a high level view of organization and methods, and service management issues. The questionnaire is not a script but a guideline to the subject areas for discussion. Sub-sections may be left out if not appropriate, (e.g. omit Unix or NT if only discussing Mainframes or visa versa). It may well be possible to have all the questions answered by one person of the appropriate level within an organization, but some may remain unanswered initially.

In addition to completing the questionnaire the following information would be helpful:
- Organization chart (all staff)
- Hardware and software inventories
- A copy of Service Level Agreement(s)
- Any other relevant documentation the customer is prepared to supply

The questionnaire should be viewed as a 'living' document and as such will be continually reviewed and updated.

Some important questions that should be answered internally:
- What the customer is trying to achieve?
- What are the business requirements and/or issues that are affected?
- What are the customer's "pain points"?
- Is there enough information to qualify the opportunity?

People • Process • Technology
Organization • Integration

1   Scope and Benefit Analysis

1. Describe the requirement in high-level terms. (*If a Specification of Requirements is available this can be used as a prompt for many of the following questions, and as a means of expanding the discussion.*)	
2. What is the perceived benefit that is trying to be achieved? • Cost Reduction? • Service Improvement? • Staff Redeployment? • Other?	
3. Where is the greatest benefit?	
4. Does the 80:20 rule apply? *(80% of the benefit accrues from 20% of the effort)*	
5. Are there metrics to quantify and verify the benefit?	
6. Is a TCO study an option to confirm the potential benefit?	
7. Do the customer requirements match the capabilities of an Outside Service Vendor?	
8. What is the customer perception of the Outside Service Vendor capabilities and offerings?	

People • Process • Technology
Organization • Integration

2 Organization & Methods

1. Describe the current organization. (*If an organization chart is available it can be used as reference for expanded discussions*)	
2. How many staff is there in total?	
3. Where are they located?	
4. Does the customer distinguish between Service Support and Service Delivery functions? *(The following two questions determine how these relate to ITSM)*	
5. What is the scope of Service Support?	
6. What is the scope of Service Delivery?	
7. How many of the staff is affected by this initiative? • Software Installation/Maintenance • Software Support • Hardware planning • Other	
8. What is the policy towards staff redeployment, in relation to this initiative? *(Use this question to explore whether the customer is making any assumptions regarding in or out sourcing)*	
9. How many/which staff is aware of this initiative?	

People • Process • Technology
Organization • Integration

10. Which services/functions are platform independent? Which are on a network?	
11. What formal interfaces/relationships will be required with other groups outside the scope of this initiative? • Operations? • Network? • Configuration Management? • DBA? • Other?	
12. What is the main form of internal communication? • Meeting? • Email? • Voice-mail? • Telephone?	
13. What proportion of technical staff time is spent on support vs. projects?	
14. What constitutes a project?	
15. What Project Management tools and methodology is used?	

People • Process • Technology
Organization • Integration

3   Processing

1. Describe the current processing configuration. (*If a configuration diagram or hardware inventory is immediately available it can be used as reference for expanded discussions*)	
Mainframe/Large Scale Servers	
2. How many processors and/or servers are currently installed?	
3. How many Logical Partitions (if any) are supported?	
4. What are the primary software sub-systems? (*A copy of the software inventory should be obtained at this point, if possible.*)	
5. What is the primary workload for each large server and/or image? • Production/Development • MIS, DSS • Online Systems • Operating System test	
6. How many GB of disk storage are installed?	
7. Other peripherals? • Tape drives/robots • CD-ROM's • Printers • Other	

People • Process • Technology
Organization • Integration

LUNIX/UNIX/NT	
8. How many LUNIX/Unix/NT Servers are currently installed?	
9. What "flavors" of Unix are in use? E.g. Sun Solaris, HP-UX, Sequent, etc.	
10. What are the primary software sub-systems? (*A copy of the software inventory should be obtained at this point, if possible.*)	
11. What is the primary workload for each image? • Production/Development • MIS, DSS • Online Systems • Operating System test	
12. How many GB of disk storage are installed?	
13. Other peripherals? • Tape drives/robots • CD-ROM's • Printers • Other	
Network	
14. How many network servers are currently installed?	
15. Which "flavors" of Network Operating System? E.g. NT, Netware, etc.	

People • Process • Technology
Organization • Integration

16. What are the primary software sub-systems? (*A copy of the software inventory should be obtained at this point, if possible.*)	
17. What is the primary networking protocol? • Ethernet • Token Ring • Wireless	
18. How many GB of disk storage are installed?	
19. Other peripherals?	
General	
20. Is disk storage shared across platforms? Is there a NAS or SAN?	
21. How is backup/archive managed?	
22. Is there a common printing/reporting strategy across platform?	
23. Are there any other processing platforms?	

People • Process • Technology
Organization • Integration

4   Service Delivery

1. Describe the service management policy, with special reference to problem/change management, release, and service level management. *(Request an ITSM policy document, if available.)*	
2. Is software used to support Service Management? • Help Desk? • Incident/Problem Management? • Change Management? • Configuration Management? • Financial/Asset Management? • Release Management? • Capacity Management? • Data Management? • Service Level Management? • Security Administration? • Availability Management? • Business Continuity? • Other?	
Incident/Problem Management	
3. How are customer calls logged and handled? • Help Desk • 1st/2nd level support	
4. What constitutes an incident/problem?	
5. How many problems are logged per month? • Mainframe/Large Servers • LUNIX/Unix/NT • Network • Other	

People • Process • Technology
Organization • Integration

6. What is the problem escalation procedure?	
7. What proportion of incident and/or problems are resolved within: • 1 hour? • 24 hours? • >24 hours?	
8. What is the policy regarding call-out/standby? *(Are there any assumptions regarding out-of-hours support)*	
Change Management	
9. What constitutes a change?	
10. Is there a regular Change Control meeting? (And associated processes)	
11. What areas come under change control? • Production/Development • Operating System • Hardware/Software Vendors	
12. How many changes requests are raised per month? • Mainframe/Large Servers • LUNIX/Unix/NT • Network • Other	
13. How are emergency changes	

People • Process • Technology
Organization • Integration

handled?	
Service Level Management	
14. Are there formal Service Level Agreements with users?	
15. What are normal service hours?	
16. What are the availability targets? • Overall • Mainframe/Large Servers • LUNIX/Unix/NT • Network	
17. What are response time targets? • End-to-end • Mainframe/Large Servers • LUNIX/Unix/NT • Network	
18. Are there batch service levels?	
19. How many unscheduled outages have occurred in the last 12 months? • Mainframe/Servers • LUNIX/Unix/NT • Network	
20. What proportion of the outages are attributable to: • Hardware • System software • Application software • Availability • Environment	

RL Information Consulting llc

People • Process • Technology
Organization • Integration

• Human error • Performance degradation • Other	
21. Are there any penalties associated with unscheduled outages?	
22. What is the software installation and maintenance strategy (currency and frequency)? • Mainframe/Large Servers • LUNIX/Unix/NT • Network	
23. How frequently are upgrades to the hardware platforms expected? • Mainframe/Large Servers • LUNIX/Unix/NT • Network • Storage	
24. What scheduled outages are available for hardware and software installation and testing?	
25. Is there a Disaster Recovery plan? Is it based on a Business Impact Analysis (BIA)?	
26. What level of Disaster Recovery testing is carried out? How frequently?	
27. Is there a chargeback/accounting system in operation?	

People • Process • Technology
Organization • Integration

5   Free Format Q&A