



## Service Portfolio Management

**Purpose:** "...[E]nsure that the service provider has the right mix of services to balance the investment in IT with the ability to meet business outcomes." (SS 4.2.1)

**Activities:** Define services and business cases, analyze service value propositions and set priorities; approve changes to services and authorize action, and charter services - communicating service descriptions, value potential, priority, and authorizing action on and resource allocation to the services (SS 4.2.5)

### General Platform Criteria Assessment Questions

PinkVERIFY #	General Platform Criterion Assessment Question
ISS #	
<b>Vendor Response: (cell expands to accommodate response)</b>	
SPM-11-G-001	Does the tool use ITIL® 2011 Edition process terms and align to ITIL 2011 Edition workflows and process integrations?
N/A	
<i>Comment:</i>	
SPM-11-G-002	Access Permissions
13.21	Does the tool have controls that prevent unauthorized access?
<i>Provide an overview description of the tool's security permissions' capability, structure and authority basis (e.g.: based on role, organization, location).</i>	
SPM-11-G-003	Does the tool support designating fields as mandatory?
N/A	
<i>Provide an overview:</i>	
SPM-11-G-004	Does the tool provide out-of-the-box reports and facilitate flexible (ad hoc) report generation?
N/A	
<i>Provide an overview:</i>	
SPM-11-G-005	Does the tool facilitate the production of management reports from historical records?
N/A	
<i>Provide an overview:</i>	
SPM-11-G-006	Does the tool provide an audit trail for record information and updates? For example: IDs of individuals or groups opening, updating and closing records; dates and times of status and activities updates, types of activities
N/A	
<i>Describe:</i>	
SPM-11-G-007	Does the tool automate notification and escalation to keep IT and users informed of potential issues or progress?
N/A	
<i>Describe:</i>	
SPM-11-G-008	Does the tool provide facilities within the tool database for archiving closed records?
N/A	
<i>Describe:</i>	



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**Core Criteria Assessment Questions**

PinkVERIFY #	Core Criterion Assessment Question
ISS #	
<i>Vendor Response: (cell expands to accommodate response)</i>	
SPM-11-C-001	SPM Records
13.1	Does the tool allow for the creation of service portfolio records?
<i>Describe (can include screenshots):</i>	
SPM-11-C-002	Record Content
13.2	Does the tool provide a set of fields adequate to contain all necessary service portfolio content? 19 fields are recommended.
<i>Describe (can include screenshots):</i>	
SPM-11-C-003	Status of Service Elements
13.3	Does the tool support different statuses for the same service record content at the same time? (Related to question above.)
<i>Describe (can include screenshots):</i>	
SPM-11-C-004	SPM Lifecycle Stages
13.15	Does the tool allow the lifecycle stages of service pipeline, service catalogue and retired serviced to be recorded and updated for every portfolio record?
<i>Describe (can include screenshots):</i>	
SPM-11-C-005	Service Development
13.9	Does the tool allow new service developments to be recorded?
<i>Describe (can include screenshots):</i>	
SPM-11-C-006	Process Activities
13.11	Does the tool allow for lifecycle management of services in the stages of defined, analyzed, approved, chartered?
<i>Describe (can include screenshots):</i>	
SPM-11-C-007	Business Cases
13.10	Does the tool allow for business cases as supporting documentation to be stored or referenced?
<i>Describe (can include screenshots):</i>	
SPM-11-C-008	Does the tool facilitate the recording, updating, monitoring and tracking of a Service's transition statuses and activities? For example: Transition activities into the live environment and the Service Catalog stage, and transition activities into the Retirement stage
N/A	
<i>Describe (can include screenshots):</i>	
SPM-11-C-009	Pipeline Services
13.17	Can the tool provide a view/ list of services in the pipeline (i.e. under development)?
<i>Describe (can include screenshots):</i>	



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PinkVERIFY #	Core Criterion Assessment Question
ISS #	
<b>Vendor Response: (cell expands to accommodate response)</b>	
SPM-11-C-010 13.18	Retired Services Can the tool provide a view/ list of retired services?
<i>Describe (can include screenshots):</i>	
SPM-11-C-011 N/A	Does the tool facilitate the recording of or linking to business-related attributes of services? For example: Business processes supported, business owners, and business users.
<i>Describe (can include screenshots):</i>	
SPM-11-C-012 N/A	Does the tool facilitate the recording of or linking to technical aspects of the services? For example: Applications used, IT owners, supporting services, dependent services, and, OLAs, contracts and agreements.
<i>Describe (can include screenshots):</i>	
SPM-11-C-013 13.5	Service Finance Does the tools have fields for financial information about services? Such as costs and charges.
<i>Describe (can include screenshots):</i>	
SPM-11-C-014 13.6	Third Party Services Does the tool record details of third party services?
<i>Describe (can include screenshots):</i>	
SPM-11-C-015 13.4	Flexible Designing Does the tool allow client- defined fields to enable the content design to meet their particular needs?
<i>Describe (can include screenshots):</i>	
SPM-11-C-016 13.8	Service Inventory Does the tool allow a service inventory to be recorded?
<i>Describe (can include screenshots):</i>	
SPM-11-C-017 13.12	Value Proposition Does the tool allow the service value proposition to be recorded?
<i>Describe (can include screenshots):</i>	



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**Integration Criteria Assessment Questions**

PinkVERIFY #	Integration Criterion Assessment Question
ISS #	
<i>Vendor Response: (cell expands to accommodate response)</i>	
SPM-11-I-001	Linking Services
13.14	Does the tool allow the services to be linked to the required capabilities and resources?
<i>Describe (can include screenshots):</i>	
SPM-11-I-002	Service Requirements
13.16	Does the tool allow a link to, or the recording of service requirements in the service portfolio?
<i>Describe (can include screenshots):</i>	
SPM-11-I-003	SLA Link
13.19	Does to tool provide a facility to link to the appropriate service level agreements?
<i>Describe (can include screenshots):</i>	
SPM-11-I-004	Service Catalog Link
13.7	Does the tool allow service portfolio items to be linked to service catalog records?
<i>Describe (can include screenshots):</i>	
SPM-11-I-005	Does the tool integrate with IT Financial Management, Capacity Management and Demand Management tools or systems processes to track actual number of users, usage (consumption) and costs?
N/A	
<i>Describe (can include screenshots):</i>	
SPM-11-I-006	Capacity & Finance Links
13.20	Can the tool integrate with capacity or demand and financial technology to provide service usage, cost and forecast?
<i>Describe (can include screenshots):</i>	
SPM-11-I-007	Data Validation
13.13	Does the tool support portfolio services validation on a recurring basis?
<i>Describe (can include screenshots):</i>	