



Service Portfolio Management V3

Purpose: “A dynamic method for governing investments in service management across the enterprise and managing them for value.” (SS 5.3)

Methods: Define (inventory services, ensure business cases and validate portfolio data); Analyze (maximize portfolio value, align and prioritize, and balance supply and demand); Approve (finalize proposed portfolio, authorize services and resources); Charter (communicate decisions, allocate resources and charter services). (SS 5.4)

GENERAL PLATFORM CRITERIA

PinkVERIFY #	General Platform Criterion Assessment Question
Vendor Response	
SPM-V3-G-001	Does the tool use ITIL® V3 process terms and align to ITIL V3 workflows and process integrations?
Comment:	
SPM-V3-G-002 (OGC ISS 13.1.21)	Access Permissions Does the tool have controls that prevent unauthorized access?
Provide an overview description of the tool’s security permissions’ capability, structure and authority basis (e.g.: based on role, organization, location).	
SPM-V3-G-003	Does the tool support designating fields as mandatory?
Provide an overview:	
SPM-V3-G-004	Does the tool provide out-of-the-box reports and facilitate flexible (ad hoc) report generation?
Provide an overview:	
SPM-V3-G-005	Does the tool facilitate the production of management reports from historical records?
Provide an overview:	



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PinkVERIFY #	General Platform Criterion Assessment Question
Vendor Response	
SPM-V3-G-006	Does the tool provide an audit trail for record information and updates? E.g.: IDs of individuals or groups opening, updating and closing records; dates and times of status and activities updates, types of activities
Describe:	
SPM-V3-G-007	Does the tool automate notification and escalation to keep IT and users informed of potential issues or progress?
Describe:	
SPM-V3-G-008	Does the tool provide facilities within the tool database for archiving closed records?
Describe:	



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CORE CRITERIA

PinkVERIFY #	Core Criterion Assessment Question
Vendor Response	
SPM-V3-C-001 (OGC ISS 13.1.1)	SPM Records Does the tool allow for the creation of Service Portfolio records?
Describe (can include screenshots):	
SPM-V3-C-002 (OGC ISS 13.1.2)	Record Content Does the tool contain fields to hold adequate Service Portfolio content? E.g.: Service Name, Description, Status and Classification (19 listed in SD p35).
Describe (can include screenshots):	
SPM-V3-C-003 (OGC ISS 13.1.3)	Status Of Service Elements Does the tool support different statuses for the same service record content at the same time? (Related to question OGC ISS 13.1.2 / SPM-V3-C002.)
Describe (can include screenshots):	
SPM-V3-C-004 (OGC ISS 13.1.15)	SPM Lifecycle Stages Does the tool allow the lifecycle stages of Service Pipeline, Service Catalog and Retired Serviced to be recorded and updated for every portfolio record?
Describe (can include screenshots):	
SPM-V3-C-005 (OGC ISS 13.1.9)	Service Development Does the tool allow new service developments to be recorded?
Describe (can include screenshots):	



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PinkVERIFY #	Core Criterion Assessment Question
Vendor Response	
SPM-V3-C-006 (OGC ISS 13.1.11)	Process Activities Does the tool allow for lifecycle management of Services in the stages of Defined, Analyzed, Approved, and Chartered?
Describe (can include screenshots):	
SPM-V3-C-007 (OGC ISS 13.1.10)	Business Cases Does the tool allow for business cases as supporting documentation to be stored or referenced?
Describe (can include screenshots):	
SPM-V3-C-008	Does the tool facilitate the recording, updating, monitoring and tracking of a Service’s transition statuses and activities? E.g.: Transition activities into the live environment and the Service Catalog stage, and transition activities into the Retirement stage.
Describe (can include screenshots):	
SPM-V3-C-009 (OGC ISS 13.1.17)	Pipeline Services Can the tool provide a view/list of services in the pipeline (e.g.: under development)?
Describe (can include screenshots):	
SPM-V3-C-010 (OGC ISS 13.1.18)	Retired Services Can the tool provide a view/list of retired services?
Describe (can include screenshots):	



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PinkVERIFY #	Core Criterion Assessment Question
Vendor Response	
SPM-V3-C-011	Does the tool facilitate the recording of or linking to business-related attributes of services? E.g.: Business processes supported, business owners, and business users.
Describe (can include screenshots):	
SPM-V3-C-0012	Does the tool facilitate the recording of or linking to technical aspects of the services? E.g.: Applications used, IT owners, supporting services, dependent services, and, OLAs, contracts and agreements.
Describe (can include screenshots):	
SPM-V3-C-013 (OGC ISS 13.1.5)	Service Finance Does the tool have fields for financial information about services? Such as costs and charges.
Describe (can include screenshots):	
SPM-V3-C-014 (OGC ISS 13.1.6)	Third Party Services Does the tool record details of third party services?
Describe (can include screenshots):	
SPM-V3-C-015 (OGC ISS 13.1.4)	Flexible Designing Does the tool allow client-defined fields to enable the content design to meet their particular needs?
Describe (can include screenshots):	



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PinkVERIFY #	Core Criterion Assessment Question
Vendor Response	
SPM-V3-C-016 (OGC ISS 13.1.8)	Service Inventory Does the tool allow a service inventory to be recorded?
Describe (can include screenshots):	
SPM-V3-C-017 (OGC ISS 13.1.12)	Value Proposition Does the tool allow the service value proposition to be recorded?
Describe (can include screenshots):	



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INTEGRATION CRITERIA

PinkVERIFY #	Integration Criterion Assessment Question
Vendor Response	
SPM-V3-I-001 (OGC ISS 13.1.14)	Linking Services Does the tool allow the services to be linked to the required capabilities and resources?
Describe (can include screenshots):	
SPM-V3-I-002 (OGC ISS 13.1.16)	Service Requirements Does the tool allow a link to or the recording of Service Requirements in the Service Portfolio?
Describe (can include screenshots):	
SPM-V3-I-003 (OGC ISS 13.1.19)	SLA Link Does to tool provide a facility to link to the appropriate Service Level Agreements?
Describe (can include screenshots):	
SPM-V3-I-004 (OGC ISS 13.1.7)	Service Catalog Link Does the tool allow Service Portfolio items to be linked to Service Catalog records?
Describe (can include screenshots):	



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PinkVERIFY #	Integration Criterion Assessment Question
Vendor Response	
SPM-V3-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?
Describe (can include screenshots):	
SPM-V3-I-006 (OGC ISS 13.1.20)	Capacity & Finance Links Can the tool integrate with Capacity or demand and financial technology to provide service usage, cost and forecast?
Describe (can include screenshots):	
SPM-V3-I-007 (OGC ISS 13.1.13)	Data Validation Does the tool allow portfolio data to be validated on a recurring basis?
Describe (can include screenshots):	