

## DEMO OF ISO 20000-1:2018 DOCUMENTATION KIT

A completely editable documentation package (SMS Manual, ITSMS Plan, Procedures, Policies, SOPs, Job Descriptions, Forms, Audit Checklists, etc.)

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### Chapter-1.0 Contents of ISO 20000-1:2018 Documentation Kit (More than 150 document files)

A. The totally editable documentation kit has 9 main directories as below:

Sr. No.	List of Directories	Details of Documents
1.	SMS Manual	14 files in MS Word
2.	ITSMS Plan	02 Files - 45 Pages in MS Word and process flow in image
3.	SMS Procedures	20 procedures in MS Word
4.	Policies	14 policies in MS Word
5.	Standard Operating Procedures	09 Standard Operating Procedures in MS Word
6.	Job Description	24 Job description in MS Word
7.	Blank Formats /Templates Name of departments	69 Blank formats in MS Word / Excel
	Admin (Admin)	12 formats in Ms. Word / Excel
	HW	06 formats in Ms. Word / Excel
	Information Security (IS)	02 formats in Ms. Word / Excel
	Marketing (MKT)	02 formats in Ms. Word / Excel
	Purchase (PUR)	05 formats in Ms. Word / Excel
	Service (SER)	17 formats in Ms. Word / Excel
	SMS	17 formats in Ms. Word / Excel
Training (TRG)	08 formats in Ms. Word / Excel	
8.	ISO 20000-1:2018 Audit Checklist	More than 500 questions
9.	ISO 20000-1:2018 Compliance Matrix (Requirement wise reference of documented information)	01 File in MS-Excel

**Total 150 files in editable form for Quick Download by e-delivery**

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### **B. Documented information package:**

Our documentation kit comprises sample documents required for ISO 20000-1:2018 certification as listed below. **All documents are in MS Word / Excel format and you can edit them.** You can make changes as per your company's needs and **within few days your entire documents** with all necessary system requirements can become ready. In the ISO 20000-1:2018, at few places, documented information are required. But for making the system better, we have provided many editable templates from which a user can select and make some minor changes to make own system. Now, ISO 20000-1:2018 standard does not require manual, procedures, etc. It requires two types of documented information as listed below:

1. **Maintain documented information (Scope, SMS Manual, etc.)**
2. **Retain documented information (Forms / Templates)**

Under the given directories, further files are provided in MS word document as per the details given below. All the documents are related to IT services industry.

### **1. SMS Manual (10 Chapters and 3 Annexure):**

This is a sample copy of service management system manual which gives clause-wise details of how ISO 20000-1:2018 system is implemented. It covers the service management system, sample policy, objectives, scope, and organization structure as well as how each requirement from clause no. 4 to 10 of ISO 20000-1:2018 is implemented at macro level in the organization. The manual covers ISO 20000-1:2018 documents for tier-1 of documented information. It has total 10 chapters covering company profile, amendment sheet, index, and clause-wise details on how ISO 20000-1:2018 system is implemented in an organization.

### **(A) Table of Contents**

Chapter No.	Subject	Page No.	ISO 20000 -1:2018 Clause Reference
<b>Section – 1</b>			
1.	Table of contents and authorization statement	1 – 4	-----
2.	Company profile	1 – 2	-----
3.	Control and distribution	1 – 3	-----
<b>Section – 2</b>			
Chapter No.	Title of SMS manual chapter	Page no.	ISO 20000-1 REQ.
4.	<b>Context of the organization</b>	1 – 1	<b>4.0</b>
	Understanding the organization and its context		4.1
	Understanding the needs and expectations of interested parties		4.2
	Determining the scope of the service management system		4.3
	Service management system		4.4
5.	<b>Leadership</b>	1 – 8	<b>5.0</b>

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	Leadership and commitment		5.1
	Policy		5.2
	Establishing the service management policy		5.2.1
	Communicating the service management policy		5.2.2
	Organizational roles, responsibilities and authorities		5.3
6.	<b>Planning</b>	1 – 3	<b>6.0</b>
	Actions to address risks and opportunities		6.1
	Service management objectives and planning to achieve them		6.2
	Establish objectives		6.2.1
	Plan to achieve objectives		6.2.2
	Plan the service management system		6.3
7.	<b>Support</b>	1 – 5	<b>7.0</b>
	Resources		7.1
	Competence		7.2
	Awareness		7.3
	Communication		7.4
	Documented information		7.5
	General		7.5.1
	Creating & Updating		7.5.2
	Control of documented information		7.5.3
	Service management system documented information		7.5.4
	Knowledge		7.6
8.	<b>Operation</b>	1 – 11	<b>8.0</b>
	Operational planning and control		8.1
	Service Portfolio		8.2
	Service delivery		8.2.1
	Plan the services		8.2.2
	Control of parties involved in the service lifecycle		8.2.3
	Service catalogue management		8.2.4
	Asset management		8.2.5
	Configuration management		8.2.6
	Relationship and agreement		8.3
	General		8.3.1
	Business relationship management		8.3.2
	Service level management		8.3.3
	Supplier management		8.3.4
	Supply and Demand		8.4
	Budgeting and accounting for services		8.4.1
Demand management	8.4.2		

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	Capacity management		8.4.3
	Service design, build and transition		8.5
	Change management		8.5.1
	Service design and transition		8.5.2
	Release and deployment management		8.5.3
	Resolution and fulfillment		8.6
	Incident management		8.6.1
	Service request management		8.6.2
	Problem management		8.6.3
	Service assurance		8.7
	Service availability management		8.7.1
	Service continuity management		8.7.2
	Information security management		8.7.3
	<b>Performance Evaluation</b>		<b>9.0</b>
<b>9.</b>	Monitoring, measurement, analysis and evaluation	1 – 5	9.1
	Internal audit		9.2
	Management review		9.3
	Service reporting		9.4
<b>10.</b>	<b>Improvement</b>	1 – 2	<b>10.0</b>
	Nonconformity and corrective action		10.1
	Continual Improvement		10.2
<b>Annexure</b>			
ANX-I	List of SMS Procedures	1 – 2	-
ANX-II	Glossary of Terms	1 – 1	-
ANX-III	Process Flow Chart	1 – 4	-

### 2. ITSMS Plan:

It includes the complete IT service management system plan with interlinkage of various processes and reference of procedures, ITSMS policy and objectives. It covers the frame work to fulfill the service requirements.

### 3. Procedures (20 procedures):

Sample copies of mandatory procedures as per ISO 20000-1:2018 are provided, which cover all the details like purpose, scope, responsibility, how procedure is followed as well as the list of exhibits, reference documents and formats. The list of sample procedures provided in the kit is as below.

#### List of Procedures

1. Procedure for Communication
2. Procedure for Document Control
3. Procedure for Control of Records

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4. Procedure for Internal Audit
5. Procedure for Improvements
6. Procedure for Service Management
7. Procedure for Delivery of New Changes
8. Procedure for Management Review
9. Procedure for Service Continuity
10. Procedure for Budgeting and Accounting Services
11. Procedure for Capacity Management
12. Procedure for Incident Management
13. Procedure to Manage Service Complaints
14. Procedure for Supplier Management
15. Procedure for Problem Management
16. Procedure for Configuration Management
17. Procedure for Organization Security
18. Procedure for Training
19. Procedure for Availability Management
20. Procedure for Corrective Action

### 4. Policies (14 policies)

Sample copies of guidelines covering policies as per ISO 20000-1:2018 are provided; the list of sample policies provided in the kit is as below.

#### List of Policies

1. Availability Management Policy
2. Visitor Policy
3. BRM Policy
4. Budgeting and Accounting Policy
5. Capacity Management Policy
6. Change Management Policy
7. Configuration Management Policy
8. Incident Management Policy
9. Information Security Policy
10. Internet Policy
11. Problem Management Policy
12. Release Management Policy
13. Service Management Policy
14. Supplier Management Policy

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### 5. Standard Operating Procedures (09 SOPs):

This directory of the kit covers sample copy of SOPs to link with significant aspects in the organization. It takes care of all such aspects and can be used as a training guide as well as to establish good ITSMS system in the organization. The samples given are as a guide and not compulsory to follow and organization is free to change the same to suit own requirements.

#### List of Standard Operating Procedures

1. SOP for Company Internet and IT Resource Use
2. SOP for E-mail and Messenger Use
3. SOP for Service Continuity Testing
4. SOP for Personnel Recruitment
5. SOP for Service Reporting
6. SOP for Risk Management
7. SOP for Business Relationship Management
8. SOP for Change Control Management
9. SOP for Release and Deployment

### 6. Job Descriptions (24 job descriptions)

This directory covers sample copy of job descriptions covering 24 different categories of personnel including their responsibility and authority. All job descriptions are listed below:

#### List of Job Descriptions

- |                                  |                                    |
|----------------------------------|------------------------------------|
| 1. Roles and Responsibilities    | 13. Networking Engineer            |
| 2. Availability Manager          | 14. Problem Manager                |
| 3. Business Development Manager  | 15. Project Manager                |
| 4. Capacity Manager              | 16. Purchase Manager               |
| 5. Change Manager                | 17. QA Manager                     |
| 6. Configuration Manager         | 18. Release and Deployment Manager |
| 7. Director                      | 19. Accounts Manager               |
| 8. HR Head                       | 20. Service Continuity Manager     |
| 9. Incident Manager              | 21. Service Engineers              |
| 10. Information Security Manager | 22. Service Reporting Manager      |
| 11. Manager Service              | 23. SLM Manager                    |
| 12. MR                           | 24. Team Lead                      |

### 7. Blank sample formats for all the departments (69 sample formats)

This directory includes sample copy of blank forms that are required to maintain records as well as establish control and create system in the organization. The samples are given for the users as a guide to follow. The organization is free to change the same to suit their own requirements. The blank formats can be used as templates. A total of 69 blank formats are provided as per the list given below.

#### List of blank formats

- |  |                                 |
|--|---------------------------------|
| 1. Visitor Entry Register                          | 36. Availability Plan template  |
| 2. Employee leaving/transfer/termination Checklist | 37. Capacity Plan template      |
| 3. Employment confidentiality and Non-competition  | 38. Configuration Plan template |

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- |  |  |
|--|--|
| agreement  |  |
| 4. Vehicle Requisition Form                                    | 39. Contract template                                  |
| 5. Experience, Personal Information & Assessment Chart (EPIAC) | 40. Key performance indicator template                 |
| 6. Duty Resumption Form  | 41. Service acceptance criteria template               |
| 7. Employee Performance Appraisal Form                         | 42. Service continuity plan template                   |
| 8. Expense Claim Form  | 43. Service level agreement                            |
| 9. Human Resource Requisition Form                             | 44. Service catalogue template                         |
| 10. Record Of Disciplinary Action                              | 45. Master List And Distribution List Of SMS Documents |
| 11. Exit Interview Form  | 46. Change Request Form                                |
| 12. Job Description  | 47. Corrective Action Report                           |
| 13. Breakdown History Card                                     | 48. Master List Of Records                             |
| 14. Preventive Maintenance Form                                | 49. Service Improvement Plan                           |
| 15. Assets Register  | 50. Audit Plan / Program                               |
| 16. Software License Control Form                              | 51. Internal Audit Non-Conformity Report               |
| 17. Backup Strategy Form                                       | 52. Audit Checklist Report                             |
| 18. Hardware Modification Impact Assessment                    | 53. Process Improvement Form                           |
| 19. Incident Types & Max Permissible Limit                     | 54. Change Control Log                                 |
| 20. New User Creation Form                                     | 55. Weekly/Monthly Project Review Minutes Of Meeting   |
| 21. Customer Feed Back Form                                    | 56. Internal Quality Audit - Observation Sheet         |
| 22. Customer Complaint Report                                  | 57. Agenda For Management Reviews                      |
| 23. Purchase Order   | 58. Minutes Of The Management Review Meeting           |
| 24. Office Supplies Request Form                               | 59. Business Continuity Test Report                    |
| 25. Purchase Request Form                                      | 60. Non-Conformance Report Log                         |
| 26. Purchase Request Flow Register                             | 61. Objective Monitoring Sheets                        |
| 27. Supplier confidentiality and Non-competition agreement     | 62. Training Calendar                                  |
| 28. Service Management Plan                                    | 63. Employees Competence Report                        |
| 29. Component Failure Impact Analysis                          | 64. Induction Training Report                          |
| 30. Risk Management And Tracking Sheet                         | 65. Training Report                                    |
| 31. Issue Log  | 66. Skills Matrix Sheet                                |
| 32. Change Request Forms                                       | 67. Requisition For Training                           |
| 33. Operational Level Agreement Template                       | 68. Record Of Training Attended By The Employee        |
| 34. Capacity Planning  | 69. Training Participant's Feedback Form               |
| 35. Customer Service Report                                    |  |

### **8. ISO 20000-1:2018 Audit Checklists (More than 500 Questions)**

In total, two checklists – ISO 20000-1:2018 requirements wise as well as gap analysis checklist – are provided. These checklists are very good tools for the auditors to make audit questionnaire and bring effectiveness in auditing. The questions are prepared on the basis of ISO 20000-1:2018 standard. They can be logically used for auditing during internal audit for ISO 20000-1:2018 to establish proper audit trail.

### **9. ISO 20000-1:2018 compliance matrix**

This compliance matrix contains ISO 20000-1:2018 requirement wise list of documented information for easy reference of users and to understand how this system is made.

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### Chapter-2.0 ABOUT COMPANY

Joinconsultant is a progressive company promoted by a group of qualified engineers and management graduates having rich experience of over 25 years in ISO consultancy and management areas. The company serves the global customers through on-site and off-site modes of service delivery systems. We offer a full range of consulting services geared towards helping all types of organizations to achieve competitiveness, certifications and compliance to international standards and regulations. So far, we have **more than 2700 clients in more than 36 countries**. Our readymade training and editable documentation kit helps the client in making their documents with ease and complying with the related ISO standard faster.

1. Our promoters and engineers have rich experience of providing management training and ISO series consultancy for **more than 2700 companies** globally. We have clients **in more than 36 countries**.
2. We are a highly qualified team of 80 members (M.B.A., Degree Engineers). Our Director has rich professional experience in this field (since 1991).
3. We have 100% success rate in ISO series certification for our clients from reputed certifying bodies. We possess a branded image and are a leading name in the global market.
4. We suggest continual improvement and cost reduction measures as well as provide highly informative training presentations and other products that give you payback within 2 months against our cost.
5. So far, we have trained more than 50000 employees in ISO series certification.
6. We have spent more than 60000 man-days (170 man-years) in the preparation of ISO documents and training slides.

#### Joinconsultant is committed for:

1. Personal involvement and commitment from the day one
2. Optimum charges
3. Professional approach
4. Hard work and updating the knowledge of team members
5. Strengthening clients by system establishment and providing best training materials in any areas of management to make their house in proper manner
6. Establishing strong internal control with the help of system and use of the latest management techniques.



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### Chapter-3.0 USER FUNCTION

#### 3.1 Hardware and Software Requirements

##### A. Hardware

- Our documentation kit can better perform with the help of P4 and higher computers with a minimum of 10 GB hard disk space.
- For better visual impact, you may keep the setting at high color.

##### B. Software

- Documents are written in MS-Office 2007 and Windows XP programs. You are, therefore, required to have MS-Office 2007 or higher versions with Windows XP.

#### 3.2 Features of Documentation Kit

- The kit contains all necessary documents as listed, and complies with the requirements of system standards.
- The documents are written in easy to understand English language.
- This kit will save much time in typing and preparing your documents at your own.
- The kit is user-friendly to adopt and easy to learn.
- The contents of this kit are developed under the guidance of experienced experts.
- The kit provides a model of the management system that is simple and free from excessive paperwork.

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### Chapter-4.0 BENEFITS OF USING OUR DOCUMENTATION KIT

1. By using these documents, you can save a lot of your precious time while preparing the ISO documents.
2. The kit takes care of all the sections and sub-sections of ISO 20000-1:2018 standards and helps you to establish better system.
3. This documentation kit enables you to change the contents and print as many copies as you need. The user can modify the documents as per their industry requirements and create their own ISO 20000-1:2018 documents for their organization.
4. It will save much cost in document preparation.
5. You will get a better control in your system due to our proven formats.
6. You will also get a better control in your system as our proven documents and templates are developed under the guidance of experts and globally proven consultants. The team has a rich experience of more than 25 years in the ISO consultancy.
7. Our products are highly sold across the globe and are used by many multinational companies. They have got total satisfaction as well as experienced value for money.
8. In the preparation of documentation kit, our team has verified and evaluated the entire content at various levels. More than 1000 hours have been spent in the preparation of this documentation kit.
9. The entire kit is prepared by a globally proven team of leading ISO consultants.

### Chapter-5.0 METHOD OF ONLINE DELIVERY

On completion of the secured purchase, we provide a username and password to download the product from our FTP server. We provide instant online delivery of our products to the user by sending an e-mail of username and password.

**For purchase,**

**Visit our website for more details on the documentation kit:**

**<https://www.joinconsultant.com>**