

Explanation of each process step of the Service Portfolio Review Process v5

- Regular review interval for each review type is once a year:
 - Services in Portfolio
 - Selection criteria
 - Portfolio processes
- Review should be finished until October/November of each year to be able to integrate the results into the next yearly report
 - To be evaluated: when review needs to be started then (=how long does a review take)

Process step	Role	Its detailed content	Step applicable for review of		
			Services in Portfolio	Selection criteria	Portfolio processes
Starting points		<ul style="list-style-type: none"> - Regular review interval is reached - Ad hoc review is required 	Yes	Yes	Yes
Create Review object	Service Portfolio Manager	<ul style="list-style-type: none"> - Add a new Review object in Plony and fill in some general information on planned review 	Yes	Yes	Yes
Check Review register for content	Service Portfolio Manager	<ul style="list-style-type: none"> - Anytime someone discovers potential for improvement, one can write down ideas in the Review register - Once a review is done, the register is checked for content and ideas are evaluated (and taken into review) 	Yes	Yes	Yes
Define scope/focus of review	Service Portfolio Manager	<ul style="list-style-type: none"> - Define what should be reviewed – services in Portfolio, selection criteria and/or Portfolio processes - Include ideas from Review register here 	Yes	Yes	Yes
Go through Review checklist and plan review action	Service Portfolio Manager	<ul style="list-style-type: none"> - Use Review checklist template depending on scope/focus defined and adapt with individual review content 	Yes	Yes	Yes
Inform service provider about upcoming review (at least 4 weeks before regular review is conducted)	Service Portfolio Manager	<ul style="list-style-type: none"> - Service providers should be informed at least 4 weeks before planned regular view is conducted - Together with the information, service providers should receive the Review checklist that will be used for the review 	Yes	Yes	Yes

Process step	Role	Its detailed content	Step applicable for review of		
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		<ul style="list-style-type: none"> - Service providers can then already check for their services what will be done and prepare for it 			
Conduct review: check whether service Exclusion criteria are still fulfilled by each service in Portfolio	Service Portfolio Manager	<ul style="list-style-type: none"> - Go through services in Portfolio and check for each if Exclusion criteria are still fulfilled - Document which services fail to fulfill Exclusion criteria (and why they fail) - Can also be conducted for a single service if important service information was updated 	Yes	No	No
Check whether service information and service description are up to date	Service Portfolio Manager	<ul style="list-style-type: none"> - Check together with service provider whether service information and service description in Cloud Portal are still up-to-date - Update outdated information 	Yes	No	No
Conduct review: adapt service selection criteria	Service Portfolio Manager	<ul style="list-style-type: none"> - Add, adapt, or delete service selection criteria - Document which changes have been conducted 	No	Yes	No
Check whether adapted Exclusion criteria are still fulfilled by each service in Portfolio	Service Portfolio Manager	<ul style="list-style-type: none"> - If Exclusion criteria were added or adapted, it is required to verify that all services in Portfolio fulfill these adapted criteria - Document which services fail to fulfill Exclusion criteria (and why they fail) 	No	Yes	No
Re-evaluate Weighting criteria for services in pipeline and adapt their rank in the Service Integration List if necessary	Service Portfolio Manager	<ul style="list-style-type: none"> - Since Weighting criteria results determine the rank of a service in the Service Integration List, it is important to re-evaluate Weighting criteria if it was adapted or new Weighting criteria added - Document re-calculated score reached and corresponding rank in Service Integration List for each service + summary of changes in Service Integration List 	No	Yes	No

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			Services in Portfolio	Selection criteria	Portfolio processes
Conduct review: adapt process(es)	Service Portfolio Manager	<ul style="list-style-type: none"> - Evaluate how currently established processes work and if there is a need for adaptation - Adapt process(es) if required - Document adaptations made 	No	No	Yes
Check whether technical adaptations are necessary due to changes	Service Portfolio Manager	<ul style="list-style-type: none"> - Since many processes are built into supporting tools, it is required to evaluate whether workflows built in the tools need to be technically adapted, too 	No	No	Yes
Document preliminary review results and corresponding changes/ recommendations	Service Portfolio Manager	<ul style="list-style-type: none"> - Summarize results made for each Review type into Review object's preliminary results - Conclude recommendations to service providers from review results - Document the corresponding recommendations 	Yes	Yes	Yes
Inform HIFIS coordinators about preliminary results/ bigger changes implemented or recommended due to the review	Service Portfolio Manager	<ul style="list-style-type: none"> - Inform coordinators about conducted changes, too (they might have a VETO here) - HIFIS coordinators are free to inform HIFIS Steering Committee about conducted changes/ask for their approval 	Yes	Yes	Yes
Conduct HIFIS internal changes e.g. on Process Framework	Service Portfolio Manager	<ul style="list-style-type: none"> - If required, adapt Process Framework, documentation, HIFIS Website or any other HIFIS internal document/tool, especially when processes or selection criteria were adapted 	Yes	Yes	Yes
Communicate recommended changes to service providers	Service Portfolio Manager	<ul style="list-style-type: none"> - Provide recommendations for changes to service providers, indicating why the change is necessary from HIFIS side (+sending preliminary review results as reasoning) - Also indicate possible consequences if recommendations are not implemented (e.g. service Offboarding is initiated if service doesn't fulfill Exclusion criteria anymore and 	Yes	Yes	Yes

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		recommendations are not implemented)			
Decide whether to implement recommended changes	Service Provider	- Even if necessary, from HIFIS side, a service provider is free to decide whether to implement the recommended changes or not	Yes	Yes	Yes
Conduct changes	Service Provider	- If service provider decides to implement changes, the implementation of course needs to be done	Yes	Yes	Yes
Inform HIFIS about conducted changes	Service Provider	- When finished, service provider is asked to inform HIFIS that recommended changes were implemented	Yes	Yes	Yes
Inform HIFIS why recommended changes are denied	Service Provider	- In case recommended changes are not implemented, service provider is asked to inform HIFIS too, indicating the reason(s) for recommendation denial	Yes	Yes	Yes
Document response of service provider	Service Portfolio Manager	- Document whether recommended changes were conducted by service or not (+reasons for denial)	Yes	Yes	Yes
Document final review results and close/finalize Review object	Service Portfolio Manager	- Add response from service provider side to preliminary results and extend them to final results - Close Review object as soon as everything is documented	Yes	Yes	Yes
Initiate Offboarding for services, if required	Service Portfolio Manager	- If service in Portfolio is not fulfilling Exclusion criteria anymore and service provider decided not to adapt the service, initiate service Offboarding			
Set date for next regular review	Service Portfolio Manager	- According to regular review interval, set date for next regular review	Yes	Yes	Yes
Empty Review register	Service Portfolio Manager	- Delete ideas from Review register that have been implemented during the review	Yes	Yes	Yes
Conduct lessons learned	Service Portfolio Manager	- Think about what could have gone better during the review	Yes	Yes	Yes

Process step	Role	Its detailed content	Step applicable for review of		
			Services in Portfolio	Selection criteria	Portfolio processes
		and write down lessons learned for next review			