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<b>Effective Date:</b>	09/22/2014	<b>Replaces:</b>	NEW
<b>Revised By:</b>	Joshua Graves	<b>Review Cycle/Date:</b>	Annual
<b>Reviewed By:</b>	Fonda Logston	<b>Reviewing Unit:</b>	Project Management Office
<b>Title:</b>	ABRM Agency Review Packet Creation Standard		
<b>Description:</b>	This document is the operating standard for the ABRM's Agency Review.		

## ABRM Agency Review Packet Creation Standard

1. General Statement of Purpose
  - 1.1 This document contains the format and essential functions for each ABRM when they hold their meetings with their agency customers. Its intended purpose is to provide a standard format for all ABRMs to use when developing their monthly or weekly reviews in order to provide consistency and ease of use.
    - 1.1.1 Each Agency Review is to be held at least once each month.
2. Scope
  - 2.1 This standard is for the benefit of each ABRM when reviewing their agency's production issues and concerns.
3. Discipline
  - 3.1 Relationship Management Standards
4. Terms and Definitions
  - 4.1 ABRM or Agency Business Relationship Manager – an agency's business representative.
  - 4.2 Service Catalog – the list of services that are provided by OMES/ISD.
5. Discussion
  - 5.1 The report to be created is broken up into 10 different parts.
    - 5.1.1 Executive Briefing/Escalations
    - 5.1.2 Current Risks/Issues/Concerns
    - 5.1.3 Cases Waiting on Partner, Vendor or Due Date
    - 5.1.4 Outstanding Service Catalog Requests
    - 5.1.5 Incidents Resolved
    - 5.1.6 Outstanding Incident Cases
    - 5.1.7 Outstanding Service Request Cases
    - 5.1.8 Enhancement Service Requests
    - 5.1.9 Projects
    - 5.1.10 Enhancements
6. Roles and Responsibilities
  - 6.1 The ABRM is responsible for preparing the information and compiling the data for the review, as well as hosting the agency review.

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## 7. Limitation or Implementation Notes

- 7.1 In order to properly put together an agency review, an ABRM will require access to CRM (Customer Relationship Management) and the PPM (Project and Portfolio Management) Tool.

## 8. Attachments

- 8.1. ABRM Agency Review Template
- 8.2. ABRM Agency Review Sample
- 8.3. Creating an ABRM Review User Guide
- 8.4. ABRM Calculator-Organizer Template
- 8.5. ABRM Calculator-Organizer Sample