

CSIA Best Practices Manual V6

Summary and FAQs

Summary of Updates for V6.0

Section 1 – General Management

The main change to this section is the addition of a new section on Business Ethics (1.4). Many System Integrators are now being asked about this in proposal prequalification documents. Currently no items in the section are audited. The Business Risk Management section (1.3.4) was also updated to include cybersecurity attacks.

Section 2 – Human Resources Management

The Recruitment and Selection section (2.2.1) was updated to include drug screening, authorization to work, and non-compete/trade secret agreements. The Performance Management section (2.3.1) was updated to include additional metrics to track and continuously track/monitor progress between formal reviews. The Safety section (2.8) was updated to include a list of safety training topics by role and considerations for contract responsibilities.

Section 3 – Marketing, Business Development, Sales and Opportunity Management

The major changes to Section 3 revolved around the idea that sales and marketing are separate functions within a company that work together. Both the sales and marketing portions were updated to current trends. The existing marketing portion was also expanded to give it more emphasis. The Proposal Development section (3.7.1) was added to list of auditable items. This expands contractual language addressing ownership of integrator-developed solutions.

Section 4 – Financial Management

Minor updates in this section to broaden standards beyond GAAP specific requirements and include more clarity around qualified professionals reviewing finances.

Section 5 – Project Management

A few items were added related to planning for supply chain issues that we are all experiencing. The Project Quality Assurance (5.12) was moved from Section 8 to this section and a new area called Agile Project Management Considerations (5.14) was added. Details around Master Service Agreements (MSA) and Purchase Orders/Statement of Work documents have also been added. The Procurement Management section now includes some considerations of inventory management.

Section 6 – System Development Lifecycle

Internal & External Kickoff section (6.1.1) was rewritten and should be reviewed in its entirety. The requirements section (6.2.3) includes details around protecting your company from liability if the client doesn't review or approve system requirements. The Internal Design Reviews section (6.3.2) was

rewritten and should be reviewed in its entirety. A Closure (6.11) section was added to address proper communications and warranty considerations.

Section 7 – Supporting Activities

The major changes in Section 7 consisted of clarifying business process definitions and the ownership of those processes as well as edits to Configuration Management to use terminology used within our industry and align more with our types of deliverables. It now includes support by all levels of management, recognition for employee contribution and a system for regular review of existing standards and templates. Some consideration was given to the support of a remote workforce (7.8.5).

Section 8 – Quality Management

This section had some significant updates to make it more focused on core Quality principles and include current with quality management trends. Project Quality Assurance was moved to Section 5 and Support and Service Quality Assurance to Section 9.

Section 9 – Service and Support

The major changes in Section 9 consisted of adding content and defining service and support services. The modifications clarify why service and support services are different than project work and why they need to be managed differently. This section also now includes an escalation method if the resource can't solve the problem.

Section 10 – Information Systems Management and Cyber Security

Multiple sections were rearranged and rewritten to allow for better flow and understanding, but the overall structure remains unchanged. The section has been updated to reflect the current state of technology and current cybersecurity standards such as ISO 27001, NIST Cybersecurity framework, along with the knowledge and experience of CSIA integrators. Some requirements were removed to focus on the IT systems of the integrator rather than deliverables to clients. This includes more focus on the security of the information of both the integrator and the customer. We also added requirements in the use of services in the cloud.

FAQs

General

Q: What's the most important section of BP&B?

A: It depends on your business and services being provided. The best approach is to read and understand each section and then look at your business on where you biggest risk or opportunities for improvement are, then start improving in one or two areas.

Q: When does V6 become relevant to me?

A: Continues improvement is key for a company and very effective with a guide that reflects the best practice of leading system integrators. So, whether you are certified or not: you can start with V6 immediately after release. Send single chapters to your different departments, have them read the new content and let them work on improving their procedures accordingly.

Q: How long do I have that I can still be certified on Version 5?

A: It depends, the final version of V6 is planned to be issued by the end of Summer 2023. Between now and the official release date you will only be able to be certified on V5. After release until December 31, 2023, you will have the choice of being certified (or recertified) on V5 or V6. After December 31, 2023, you will need to be certified (or recertified) on V6. If you are a currently certified integrator preparing for a recertification audit and would be interested in potentially being audited on V6 as a pilot audit to touch base with your auditor.

Q: I have heard that the revenue levels are changing to determine what level of minimum scores I need to obtain to pass. What are the new revenue levels for the audit minimums?

A: Correct, the new level has moved to letters instead of numbers and they are as follows: Level A – From \$750K to \$5MM in annual revenue, Level B – From \$5MM to \$15MM in annual revenue, and Level C – Anything above \$15MM in annual revenue. The only impact is that some integrators will now have a lower threshold to pass since they may now be considered a Level A instead of a Level B integrator or a Level B integrator instead of a Level C integrator.

Q: Has a new Audit Prep file been built for V6 of the BP&B manual?

A: Yes, when you let CSIA know that you would like to prepare for an audit they will forward you an electronic copy of the V6 manual as well as the V6 Audit Prep File.

Q: How will I know what has changed between V5 and V6 so I can adjust my planning in my audit prep?

A: At the back of the V6 manual, in the Appendix section, we have built in a V5 to V6 change matrix to show you what has changed. In some cases, it may just be wording changes, other cases a section may have moved, and in other cases a section may have been added or removed.

Q: Who do I contact if I have questions about any of changes from V5.0 to V6.0?

Best Practices Committee

A: Contact either your CSIA auditor or someone on the [Best Practices Committee](#) and they will be able to answer your questions directly or get the answer for you.

Q: Are remote audits still available?

A: Remote audits are available for all certifications. There are currently no restrictions imposed on the availability of remote audits. SIs are empowered to select between in-person and remote audits (it is their choice). Remote audits remain a viable option, also for new BP pilot audits.

Q: What is the key difference between CSIA Best Practices and ISO 9001?

A: CSIA Best Practices provides guidance for what procedures and guidelines are good to have for your system integration company and ISO 9001 requires a company to adhere to the procedures they have in place but doesn't provide guidance for what should be in place.

Q: Can sales and marketing be performed by the same individual?

A: Yes, for smaller organizations, the same people typically perform both sales and marketing. As an organization grows, it becomes more important to split the activities into different departments.

Q: Is Configuration Management only version control?

A: No, version control is a key component of configuration management, but Configuration Management is much more than just version control. Configuration Management is the overall plan for managing change within all deliverables and systems used for development and delivery.