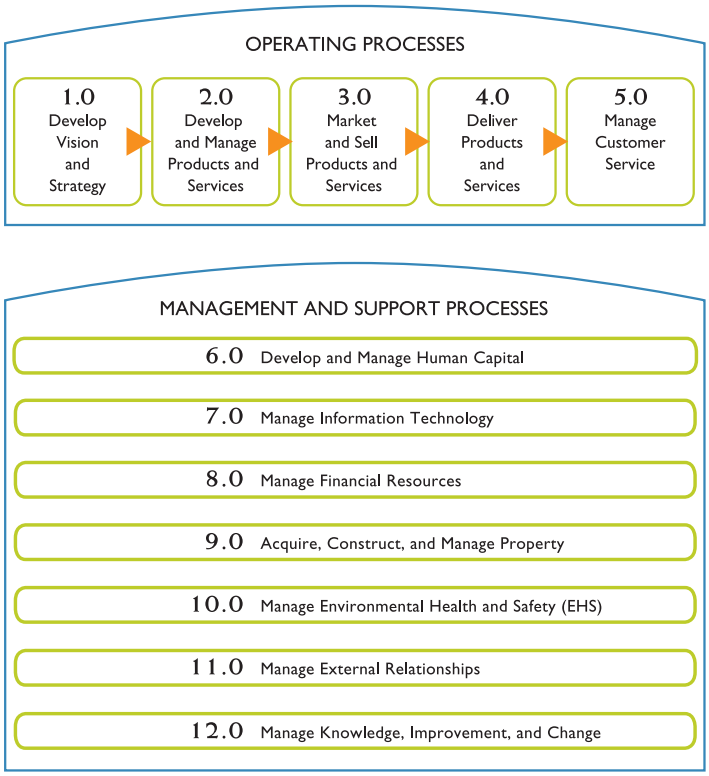
PROCESS CLASSIFICATION FRAMEWORK℠

THE FRAMEWORK FOR PROCESS IMPROVEMENT

Experience shows that the potential of benchmarking to drive dramatic improvement lies squarely in making out-of-the-box comparisons and searching for insights not typically found within intra-industry paradigms. To enable this beneficial benchmarking, the APQC Process Classification Framework℠ (PCF) serves as a high-level, industry-neutral enterprise process model that allows organizations to see their business processes from a cross-industry viewpoint.

This cross-industry framework has experienced more than 15 years of creative use by thousands of organizations worldwide. The PCF provides the foundation for APQC's Open Standards Benchmarking℠ database of performance metrics, the largest of its kind in the world, and for the work of its advisory council of global industry leaders. The PCF will continue to be enhanced as the database further develops definitions, processes, and measures. The PCF, associated measures, and definitions are available for download at no charge at www.apqc.org/osb. An online benchmarking portal for individual assessments is also available.

To capture the value inherent in intra-industry benchmarking, industry-specific frameworks are also available on the APQC Web site. Organizations can therefore choose the framework most relevant to specific process improvement needs, whether benchmarking, business process management/re-engineering, or content management.



HISTORY

The Process Classification Framework was originally envisioned as a taxonomy of business processes and a common language through which APQC member organizations could benchmark their processes. The initial design involved APQC and more than 80 organizations with strong interest in advancing the use of benchmarking in the United States and worldwide. Since its inception in 1992, the PCF has seen updates to most of its content. These updates keep the framework current with the ways that organizations do business around the world. In 2008, APQC and IBM worked together to enhance the cross-industry PCF and to develop a number of industry-specific process frameworks.

APQC would like to acknowledge the contributions of the various member organizations and individual members that have contributed time, content, and expertise in the development of this version of the PCF as well as each of the previous versions. These contributions and suggestions are vital to keeping the framework current and relevant to businesses throughout the world.

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LOOKING FORWARD

The APQC Process Classification Framework is an evolving model, which APQC will continue to enhance and improve regularly. Thus, APQC encourages comments, suggestions, and more importantly, the sharing of insights from having applied the PCF within your organization. Share your suggestions and experiences with the PCF by e-mailing pcf_feedback@apqc.org.

ABOUT APQC

An internationally recognized resource for process and performance improvement, APQC helps organizations adapt to rapidly changing environments, build new and better ways to work, and succeed in a competitive marketplace. With a focus on productivity, knowledge management, benchmarking, and quality improvement initiatives, APQC works with its member organizations to identify best practices; discover effective methods of improvement; broadly disseminate findings; and connect individuals with one another and the knowledge, training, and tools they need to succeed. Founded in 1977, APQC is a member-based nonprofit serving organizations around the world in all sectors of business, education, and government. APQC is also a proud winner of the 2003 and 2004 North American Most Admired Knowledge Enterprises (MAKE) awards. This award is based on a study by Teleos, a European based research firm, and the KNOW network.

RIGHTS AND PERMISSIONS

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THE APQC PROCESS CLASSIFICATION FRAMEWORK℠

The PCF was developed by APQC and its member companies as an open standard to facilitate improvement through process management and benchmarking, regardless of industry, size, or geography. The PCF organizes operating and management processes into 12 enterprise-level categories, including process groups and over 1,000 processes and associated activities. The PCF, associated measures, and definitions are available for download at no charge at www.apqc.org/osb.

UNDERSTANDING THE NUMBERING SCHEME

Beginning with Version 5.0.0, the PCF uses a numbering scheme that differs from previous versions. The cross-industry framework and the industry-specific frameworks collectively form a library of process elements used in APQC's Open Standards Benchmarking database.

The PCF is written in United States English language format.

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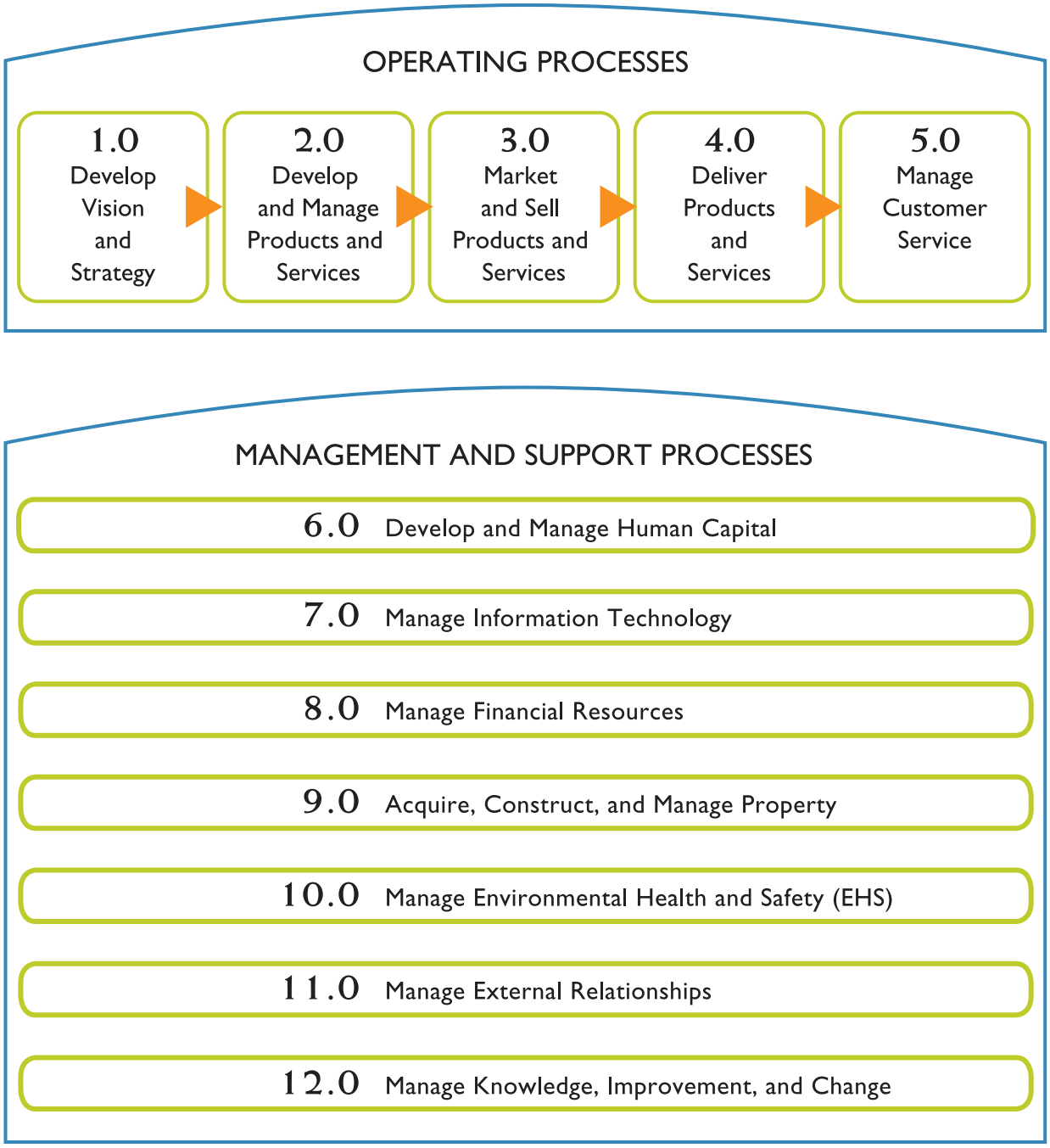

Each process element is referred to by two numbers: a number used to locate the content within that particular framework (in the format 1.2.3.4) and a serial number used to uniquely identify the process element across all of the various Open Standards Benchmarking frameworks (beginning with 10000).

For example, the process element "1.2 Develop business strategy (10015)" is uniquely identified by the serial number "10015" and the hierarchical reference number "1.2." In industry-specific frameworks, any process element identified as "10015" will have the same scope and definition, but may be labeled differently.

INTERPRETING THE PCF

Category: The highest level within the PCF is indicated by whole numbers (e.g., 8.0 and 9.0)

Process Group: Items with one decimal numbering (e.g., 8.1 and 9.1) are considered a process group.

Process: Items with two decimal numberings (e.g., 8.1.1 and 9.1.2) are considered processes.

Activity: Items with three decimal numbering (e.g. 8.3.1.1 and 9.1.1.1) are considered activities within a process.

1.0 Develop Vision and Strategy (10002)

1.1 Define the business concept and long-term vision (10014)

- 1.1.1 Assess the external environment (10017)
  - 1.1.1.1 Analyze and evaluate competition (10021)
  - 1.1.1.2 Identify economic trends (10022)
  - 1.1.1.3 Identify political and regulatory issues (10023)
  - 1.1.1.4 Assess new technology innovations (10024)
  - 1.1.1.5 Analyze demographics (10025)
  - 1.1.1.6 Identify social and cultural changes (10026)
  - 1.1.1.7 Identify ecological concerns (10027)
- 1.1.2 Survey market and determine customer needs and wants (10018)
  - 1.1.2.1 Conduct qualitative/quantitative assessments (10028)
  - 1.1.2.2 Capture and assess customer needs (10029)
- 1.1.3 Perform internal analysis (10019)
  - 1.1.3.1 Analyze organizational characteristics (10030)
  - 1.1.3.2 Create baselines for current processes (10031)
  - 1.1.3.3 Analyze systems and technology (10032)
  - 1.1.3.4 Analyze financial positions (10033)
  - 1.1.3.5 Identify enterprise core competencies (10034)
- 1.1.4 Establish strategic vision (10020)
  - 1.1.4.1 Align stakeholders around strategic vision (10035)
  - 1.1.4.2 Communicate strategic vision to stakeholders (10036)

1.2 Develop business strategy (10015)

- 1.2.1 Develop overall mission statement (10037)
  - 1.2.1.1 Define current business (10044)
  - 1.2.1.2 Formulate mission (10045)
  - 1.2.1.3 Communicate mission (10046)
- 1.2.2 Evaluate strategic options to achieve the objectives (10038)
  - 1.2.2.1 Define strategic options (10047)
  - 1.2.2.2 Assess and analyze impact of each option (10048)
  - 1.2.2.3 Develop sustainability strategy (14189)
  - 1.2.2.4 Develop global support and shared services strategy (14190)
  - 1.2.2.5 Develop risk mitigation and management strategy (14191)
  - 1.2.2.6 Develop lean/continuous improvement strategy (14197)
- 1.2.3 Select long-term business strategy (10039)
- 1.2.4 Coordinate and align functional and process strategies (10040)
- 1.2.5 Create organizational design (structure, governance, reporting, etc.) (10041)
  - 1.2.5.1 Evaluate breadth and depth of organizational structure (10049)
  - 1.2.5.2 Perform job-specific roles mapping and value-added analyses (10050)
  - 1.2.5.3 Develop role activity diagrams to assess hand-off activity (10051)
  - 1.2.5.4 Perform organization redesign workshops (10052)
  - 1.2.5.5 Design the relationships between organizational units (10053)
  - 1.2.5.6 Develop role analysis and activity diagrams for key processes (10054)
  - 1.2.5.7 Assess organizational implication of feasible alternatives (10055)
  - 1.2.5.8 Migrate to new organization (10056)
- 1.2.6 Develop and set organizational goals (10042)
- 1.2.7 Formulate business unit strategies (10043)

1.3 Manage strategic initiatives (10016)

- 1.3.1 Develop strategic initiatives (10057)
- 1.3.2 Evaluate strategic initiatives (10058)
- 1.3.3 Select strategic initiatives (10059)
- 1.3.4 Establish high-level measures (10060)

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2.0 Develop and Manage Products and Services (10003)

2.1 Manage product and service portfolio (10061)

- 2.1.1 Evaluate performance of existing products/services against market opportunities (10063)
- 2.1.2 Define product/service development requirements (10064)
  - 2.1.2.1 Identify potential improvements to existing products and services (10068)
  - 2.1.2.2 Identify potential new products and services (10069)
- 2.1.3 Perform discovery research (10065)
  - 2.1.3.1 Identify new technologies (10070)
  - 2.1.3.2 Develop new technologies (10071)
  - 2.1.3.3 Assess feasibility of integrating new leading technologies into product/service concepts (10072)
- 2.1.4 Confirm alignment of product/service concepts with business strategy (10066)
  - 2.1.4.1 Plan and develop cost and quality targets (10073)
  - 2.1.4.2 Prioritize and select new product/service concepts (10074)
  - 2.1.4.3 Specify development timing targets (10075)
  - 2.1.4.4 Plan for product/service offering modifications (10076)
- 2.1.5 Manage product and service life cycle (10067)
  - 2.1.5.1 Introduce new products/services (10077)
  - 2.1.5.2 Retire outdated products/services (10078)
  - 2.1.5.3 Identify and refine performance indicators (10079)
- 2.1.6 Manage product and service master data (14192)

2.2 Develop products and services (10062)

- 2.2.1 Design, build, and evaluate products and services (10080)
  - 2.2.1.1 Assign resources to product/service project (10083)
  - 2.2.1.2 Prepare high-level business case and technical assessment (10084)
  - 2.2.1.3 Develop product/service design specifications (10085)
  - 2.2.1.4 Document design specifications (10086)
  - 2.2.1.5 Conduct mandatory and elective external reviews (legal, regulatory, standards, internal) (10087)
  - 2.2.1.6 Build prototypes (10088)
  - 2.2.1.7 Eliminate quality and reliability problems (10089)
  - 2.2.1.8 Conduct in-house product/service testing and evaluate feasibility (10090)
  - 2.2.1.9 Identify design/development performance indicators (10091)
  - 2.2.1.10 Collaborate on design with suppliers and contract manufacturers (10092)
- 2.2.2 Test market for new or revised products and services (10081)
  - 2.2.2.1 Prepare detailed market study (10093)
  - 2.2.2.2 Conduct customer tests and interviews (10094)
  - 2.2.2.3 Finalize product/service characteristics and business cases (10095)
  - 2.2.2.4 Finalize technical requirements (10096)
  - 2.2.2.5 Identify requirements for changes to manufacturing/delivery processes (10097)
- 2.2.3 Prepare for production (10082)
  - 2.2.3.1 Develop and test prototype production and/or service delivery process (10098)
  - 2.2.3.2 Design and obtain necessary materials and equipment (10099)
  - 2.2.3.3 Install and validate production process or methodology (10100)

3.0 Market and Sell Products and Services (10004)

3.1 Understand markets, customers, and capabilities (10101)

- 3.1.1 Perform customer and market intelligence analysis (10106)
  - 3.1.1.1 Conduct customer and market research (10108)
  - 3.1.1.2 Identify market segments (10109)
  - 3.1.1.3 Analyze market and industry trends (10110)
  - 3.1.1.4 Analyze competing organizations, competitive/substitute products (10111)
  - 3.1.1.5 Evaluate existing products/brands (10112)
  - 3.1.1.6 Assess internal and external business environment (10113)
- 3.1.2 Evaluate and prioritize market opportunities (10107)
  - 3.1.2.1 Quantify market opportunities (10116)
  - 3.1.2.2 Determine target segments (10117)
  - 3.1.2.3 Prioritize opportunities consistent with capabilities and overall business strategy (10118)
  - 3.1.2.4 Validate opportunities (10119)

3.2 Develop marketing strategy (10102)

- 3.2.1 Define offering and customer value proposition (11168)
  - 3.2.1.1 Define offering and positioning (11169)
  - 3.2.1.2 Develop value proposition including brand positioning for target segments (11170)
  - 3.2.1.3 Validate value proposition with target segments (11171)
  - 3.2.1.4 Develop new branding (11172)

3.2.2 Define pricing strategy to align to value proposition (10123)
- 3.2.2.1 Establish guidelines for applying pricing of products/services (10124)
- 3.2.2.2 Approve pricing strategies/policies (10125)

3.2.3 Define and manage channel strategy (10122)
- 3.2.3.1 Evaluate channel attributes and partners (10126)
- 3.2.3.2 Determine channel fit with target segments (10127)
- 3.2.3.3 Select channels for target segments (10128)

3.3 Develop sales strategy (10103)

3.3.1 Develop sales forecast (10129)
- 3.3.1.1 Gather current and historic order information (10134)
- 3.3.1.2 Analyze sales trends and patterns (10135)
- 3.3.1.3 Generate sales forecast (10136)
- 3.3.1.4 Analyze historical and planned promotions and events (10137)

3.3.2 Develop sales partner/alliance relationships (10130)
- 3.3.2.1 Identify alliance opportunities (10138)
- 3.3.2.2 Design alliance programs and methods for selecting and managing relationships (10139)
- 3.3.2.3 Select alliances (10140)
- 3.3.2.4 Develop partner and alliance management strategies (10141)
- 3.3.2.5 Establish partner and alliance management goals (10142)

3.3.3 Establish overall sales budgets (10131)
- 3.3.3.1 Calculate product revenue (10143)
- 3.3.3.2 Determine variable costs (10144)
- 3.3.3.3 Determine overhead and fixed costs (10145)
- 3.3.3.4 Calculate net profit (10146)
- 3.3.3.5 Create budget (10147)

3.3.4 Establish sales goals and measures (10132)

3.3.5 Establish customer management measures (10133)

3.4 Develop and manage marketing plans (10104)

3.4.1 Establish goals, objectives, and metrics for products by channels/segments (10148)

3.4.2 Establish marketing budgets (10149)
- 3.4.2.1 Confirm marketing alignment to business strategy (10155)
- 3.4.2.2 Determine costs of marketing (10156)
- 3.4.2.3 Create marketing budget (10157)

3.4.3 Develop and manage media (10150)
- 3.4.3.1 Define media objectives (10158)
- 3.4.3.2 Develop marketing messages (10159)
- 3.4.3.3 Define target audience (10160)
- 3.4.3.4 Engage media provider (10161)
- 3.4.3.5 Develop and execute advertising (10162)
- 3.4.3.6 Develop and execute other marketing campaigns/programs (11253)
- 3.4.3.7 Assess brand/product marketing plan performance (11254)

3.4.4 Develop and manage pricing (10151)
- 3.4.4.1 Determine pricing based on volume/unit forecast (10163)
- 3.4.4.2 Execute pricing plan (10164)
- 3.4.4.3 Evaluate pricing performance (10165)
- 3.4.4.4 Refine pricing as needed (10166)

3.4.5 Develop and manage promotional activities (10152)
- 3.4.5.1 Define promotional concepts (10167)
- 3.4.5.2 Plan and test promotional activities (10168)
- 3.4.5.3 Execute promotional activities (10169)
- 3.4.5.4 Evaluate promotional performance metrics (10170)
- 3.4.5.5 Refine promotional performance metrics (10171)
- 3.4.5.6 Incorporate learning into future/planned consumer promotions (10172)

3.4.6 Track customer management measures (10153)
- 3.4.6.1 Determine customer loyalty/lifetime value (10173)
- 3.4.6.2 Analyze customer revenue trend (10174)
- 3.4.6.3 Analyze customer attrition and retention rates (10175)
- 3.4.6.4 Analyze customer metrics (10176)
- 3.4.6.5 Revise customer strategies, objectives, and plans based on metrics (10177)

3.4.7 Develop and manage packaging strategy (10154)
- 3.4.7.1 Plan packaging strategy (10178)
- 3.4.7.2 Test packaging options (10179)
- 3.4.7.3 Execute packaging strategy (10180)
- 3.4.7.4 Refine packaging (10181)

3.5 Develop and manage sales plans (10105)

3.5.1 Generate leads (10182)
- 3.5.1.1 Identify potential customers (10188)
- 3.5.1.2 Identify leads (10189)

3.5.2 Manage customers and accounts (10183)
- 3.5.2.1 Develop sales/key account plan (11173)
- 3.5.2.2 Manage customer relationships (11174)

3.5.3 Manage customer sales (10184)
- 3.5.3.1 Perform sales calls (10190)
- 3.5.3.2 Perform pre-sales activities (10191)
- 3.5.3.3 Close the sale (10192)
- 3.5.3.4 Record outcome of sales process (10193)

3.5.4 Manage sales orders (10185)
- 3.5.4.1 Accept and validate sales orders (10194)
- 3.5.4.2 Collect and maintain customer account information (10195)
- 3.5.4.3 Determine availability (10196)
- 3.5.4.4 Determine fulfillment process (10197)
- 3.5.4.5 Enter orders into system and identify/perform cross-sell/up-sell activity (10198)
- 3.5.4.6 Process back orders and updates (10199)
- 3.5.4.7 Handle order inquiries including post-order fulfillment transactions (10200)

3.5.5 Manage sales force (10186)
- 3.5.5.1 Determine sales resource allocation (10209)
- 3.5.5.2 Establish sales force incentive plan (10210)

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- 3.5.6 Manage sales partners and alliances (10187)
  - 3.5.6.1 Provide sales and product training to sales partners/alliances (10211)
  - 3.5.6.2 Develop sales forecast by partner/alliance (10212)
  - 3.5.6.3 Agree on partner and alliance commissions (10213)
  - 3.5.6.4 Evaluate partner/alliance results (10214)

4.0 Deliver Products and Services

4.1 Plan for and acquire necessary resources (Supply Chain Planning) (10215)

- 4.1.1 Develop production and materials strategies (10221)
  - 4.1.1.1 Define manufacturing goals (10229)
  - 4.1.1.2 Define labor and materials policies (10230)
  - 4.1.1.3 Define outsourcing policies (10231)
  - 4.1.1.4 Define manufacturing capital expense policies (10232)
  - 4.1.1.5 Define capacities (10233)
  - 4.1.1.6 Define production network and supply constraints (10234)
  - 4.1.1.7 Define production process (14193)
  - 4.1.1.8 Define production workplace layout and infrastructure (14194)
- 4.1.2 Manage demand for products and services (10222)
  - 4.1.2.1 Develop baseline forecasts (10235)
  - 4.1.2.2 Collaborate with customers (10236)
  - 4.1.2.3 Develop consensus forecast (10237)
  - 4.1.2.4 Allocate available to promise (10238)
  - 4.1.2.5 Monitor activity against forecast and revise forecast (10239)
  - 4.1.2.6 Evaluate and revise forecasting approach (10240)
  - 4.1.2.7 Measure forecast accuracy (10241)
- 4.1.3 Create materials plan (10223)
  - 4.1.3.1 Create unconstrained plan (10242)
  - 4.1.3.2 Collaborate with supplier and contract manufacturers (10243)
  - 4.1.3.3 Identify critical materials and supplier capacity (10244)
  - 4.1.3.4 Monitor material specifications (10245)
  - 4.1.3.5 Generate constrained plan (10246)
  - 4.1.3.6 Define production balance and control (14196)
- 4.1.4 Create and manage master production schedule (10224)
  - 4.1.4.1 Generate site-level plan (10247)
  - 4.1.4.2 Manage work-in-progress inventory (10248)
  - 4.1.4.3 Collaborate with suppliers (10249)
  - 4.1.4.4 Generate and execute site schedule (10250)
- 4.1.5 Plan distribution requirements (10225)
  - 4.1.5.1 Allocate available to promise (10251)
  - 4.1.5.2 Maintain master data (10252)
  - 4.1.5.3 Determine finished goods inventory requirements at destination (10253)
  - 4.1.5.4 Calculate requirements at destination (10254)
  - 4.1.5.5 Calculate consolidation at source (10255)
  - 4.1.5.6 Manage collaborative replenishment planning (10256)
  - 4.1.5.7 Manage requirements for partners (10257)
  - 4.1.5.8 Calculate destination dispatch plan (10258)
  - 4.1.5.9 Manage dispatch plan attainment (10259)
  - 4.1.5.10 Calculate destination load plans (10260)
  - 4.1.5.11 Manage partner load plan (10261)
  - 4.1.5.12 Manage cost of supply (10262)
  - 4.1.5.13 Manage capacity utilization (10263)
- 4.1.6 Establish distribution planning constraints (10226)
  - 4.1.6.1 Establish distribution center layout constraints (10267)
  - 4.1.6.2 Establish inventory management constraints (10268)
  - 4.1.6.3 Establish transportation management constraints (10269)
- 4.1.7 Review distribution planning policies (10227)
  - 4.1.7.1 Review distribution network (10264)
  - 4.1.7.2 Establish sourcing relationships (10265)
  - 4.1.7.3 Establish dynamic deployment policies (10266)
- 4.1.8 Assess distribution planning performance (10228)
  - 4.1.8.1 Establish appropriate performance indicators (metrics) (10270)
  - 4.1.8.2 Establish monitoring frequency (10271)
  - 4.1.8.3 Calculate performance measures (10272)
  - 4.1.8.4 Identify performance trends (10273)
  - 4.1.8.5 Analyze performance benchmark gaps (10274)
  - 4.1.8.6 Prepare appropriate reports (10275)
  - 4.1.8.7 Develop performance improvement plan (10276)
- 4.1.9 Develop quality standards and procedures (10368)
  - 4.1.9.1 Establish quality targets (10371)
  - 4.1.9.2 Develop standard testing procedures (10372)
  - 4.1.9.3 Communicate quality specifications (10373)

4.2 Procure materials and services (10216)

- 4.2.1 Develop sourcing strategies (10277)
  - 4.2.1.1 Develop procurement plan (10281)
  - 4.2.1.2 Clarify purchasing requirements (10282)
  - 4.2.1.3 Develop inventory strategy (10283)
  - 4.2.1.4 Match needs to supply capabilities (10284)
  - 4.2.1.5 Analyze company's spend profile (10285)
  - 4.2.1.6 Seek opportunities to improve efficiency and value (10286)
  - 4.2.1.7 Collaborate with suppliers to identify sourcing opportunities (10287)

- 4.2.2 Select suppliers and develop/maintain contracts (10278)
  - 4.2.2.1 Select suppliers (10288)
  - 4.2.2.2 Certify and validate suppliers (10289)
  - 4.2.2.3 Negotiate contracts (10290)
  - 4.2.2.4 Manage contracts (10291)
- 4.2.3 Order materials and services (10279)
  - 4.2.3.1 Process/Review requisitions (10292)
  - 4.2.3.2 Approve requisitions (10293)
  - 4.2.3.3 Solicit/Track vendor quotes (10294)
  - 4.2.3.4 Create/Distribute purchase orders (10295)
  - 4.2.3.5 Expedite orders and satisfy inquiries (10296)
  - 4.2.3.6 Record receipt of goods (10297)
  - 4.2.3.7 Research/Resolve exceptions (10298)
- 4.2.4 Appraise and develop suppliers (10280)
  - 4.2.4.1 Monitor/Manage supplier information (10299)
  - 4.2.4.2 Prepare/Analyze procurement and vendor performance (10300)
  - 4.2.4.3 Support inventory and production processes (10301)
  - 4.2.4.4 Monitor quality of product delivered (10302)

4.3 Produce/Manufacture/Deliver product (10217)

- 4.3.1 Schedule production (10303)
  - 4.3.1.1 Generate line level plan (10306)
  - 4.3.1.2 Generate detailed schedule (10307)
  - 4.3.1.3 Schedule production orders and create lots (10308)
  - 4.3.1.4 Release production orders and create lots (10309)
- 4.3.2 Produce product (10304)
  - 4.3.2.1 Manage raw material inventory (10310)
  - 4.3.2.2 Execute detailed line schedule (10311)
  - 4.3.2.3 Rerun defective items (10313)
  - 4.3.2.4 Assess production performance (10314)
- 4.3.3 Schedule and perform maintenance (10305)
  - 4.3.3.1 Determine process for preventive (planned) maintenance (Preventive Maintenance Orders) (10315)
  - 4.3.3.2 Determine process for requested (unplanned) maintenance (Work Order Cycle) (10316)
  - 4.3.3.3 Execute maintenance (10317)
  - 4.3.3.4 Calibrate test equipment (10318)
  - 4.3.3.5 Report maintenance issues (10319)
- 4.3.4 Perform quality testing (10369)
  - 4.3.4.1 Perform testing using the standard testing procedure (10374)
  - 4.3.4.2 Record test results (10375)
- 4.3.5 Maintain production records and manage lot traceability (10370)
  - 4.3.5.1 Determine lot numbering system (10376)
  - 4.3.5.2 Determine lot usage (10377)

4.4 Deliver service to customer (10218)

- 4.4.1 Confirm specific service requirements for individual customer (10320)
  - 4.4.1.1 Process customer request (10324)
  - 4.4.1.2 Create customer profile (10325)
  - 4.4.1.3 Generate service order (10326)
- 4.4.2 Identify and schedule resources to meet service requirements (10321)
  - 4.4.2.1 Create resourcing plan and schedule (10327)
  - 4.4.2.2 Create service order fulfillment schedule (10328)
  - 4.4.2.3 Develop service order (10329)
- 4.4.3 Provide service to specific customers (10322)
  - 4.4.3.1 Organize daily service order fulfillment schedule (10330)
  - 4.4.3.2 Dispatch resources (10331)
  - 4.4.3.3 Manage order fulfillment progress (10332)
  - 4.4.3.4 Validate order fulfillment block completion (10333)
- 4.4.4 Ensure quality of service (10323)
  - 4.4.4.1 Identify completed orders for feedback (10334)
  - 4.4.4.2 Identify incomplete orders and service failures (10335)
  - 4.4.4.3 Solicit customer feedback on services delivered (10336)
  - 4.4.4.4 Process customer feedback on services delivered (10337)

4.5 Manage logistics and warehousing (10219)

- 4.5.1 Define logistics strategy (10338)
  - 4.5.1.1 Translate customer service requirements into logistics requirements (10343)
  - 4.5.1.2 Design logistics network (10344)
  - 4.5.1.3 Communicate outsourcing needs (10345)
  - 4.5.1.4 Develop and maintain delivery service policy (10346)
  - 4.5.1.5 Optimize transportation schedules and costs (10347)
  - 4.5.1.6 Define key performance measures (10348)
- 4.5.2 Plan inbound material flow (10339)
  - 4.5.2.1 Plan inbound material receipts (10349)
  - 4.5.2.2 Manage inbound material flow (10350)
  - 4.5.2.3 Monitor inbound delivery performance (10351)
  - 4.5.2.4 Manage flow of returned products (10352)
- 4.5.3 Operate warehousing (10340)
  - 4.5.3.1 Track inventory deployment (10353)
  - 4.5.3.2 Receive, inspect, and store inbound deliveries (10354)
  - 4.5.3.3 Track product availability (10355)
  - 4.5.3.4 Pick, pack, and ship product for delivery (10356)
  - 4.5.3.5 Track inventory accuracy (10357)
  - 4.5.3.6 Track third-party logistics storage and shipping performance (10358)
  - 4.5.3.7 Manage physical finished goods inventory (10359)
- 4.5.4 Operate outbound transportation (10341)
  - 4.5.4.1 Plan, transport, and deliver outbound product (10360)
  - 4.5.4.2 Track carrier delivery performance (10361)
  - 4.5.4.3 Manage transportation fleet (10362)
  - 4.5.4.4 Process and audit carrier invoices and documents (10363)

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- 4.5.5 Manage returns; manage reverse logistics (10342)
  - 4.5.5.1 Authorize and process returns (10364)
  - 4.5.5.2 Perform reverse logistics (10365)
  - 4.5.5.3 Perform salvage activities (10366)
  - 4.5.5.4 Manage and process warranty claims (10367)
  - 4.5.5.5 Manage repair/refurbishment and return to customer/stock (14195)

5.0 Manage Customer Service (10006)

- **5.1 Develop customer care/customer service strategy (10378)**
  - 5.1.1 Develop customer service segmentation/ prioritization (e.g., tiers) (10381)
    - 5.1.1.1 Analyze existing customers (10384)
    - 5.1.1.2 Analyze feedback of customer needs (10385)
  - 5.1.2 Define customer service policies and procedures (10382)
  - 5.1.3 Establish service levels for customers (10383)
- **5.2 Plan and manage customer service operations (10379)**
  - 5.2.1 Plan and manage customer service work force (10387)
    - 5.2.1.1 Forecast volume of customer service contacts (10390)
    - 5.2.1.2 Schedule customer service work force (10391)
    - 5.2.1.3 Track work force utilization (10392)
    - 5.2.1.4 Monitor and evaluate quality of customer interactions with customer service representatives (10393)
  - 5.2.2 Manage customer service requests/inquiries (10388)
    - 5.2.2.1 Receive customer requests/inquiries (10394)
    - 5.2.2.2 Route customer requests/inquiries (10395)
    - 5.2.2.3 Respond to customer requests/inquiries (10396)
  - 5.2.3 Manage customer complaints (10389)
    - 5.2.3.1 Receive customer complaints (10397)
    - 5.2.3.2 Route customer complaints (10398)
    - 5.2.3.3 Resolve customer complaints (10399)
    - 5.2.3.4 Respond to customer complaints (10400)
- **5.3 Measure and evaluate customer service operations (10380)**
  - 5.3.1 Measure customer satisfaction with customer requests/inquiries handling (10401)
    - 5.3.1.1 Gather and solicit post-sale customer feedback on products and services (10404)
    - 5.3.1.2 Solicit post-sale customer feedback on ad effectiveness (10405)
    - 5.3.1.3 Analyze product and service satisfaction data and identify improvement opportunities (10406)
    - 5.3.1.4 Provide customer feedback to product management on products and services (10407)
  - 5.3.2 Measure customer satisfaction with customer-complaint handling and resolution (10402)
    - 5.3.2.1 Solicit customer feedback on complaint handling and resolution (11236)
    - 5.3.2.2 Analyze customer complaint data and identify improvement opportunities (11237)
  - 5.3.3 Measure customer satisfaction with products and services (10403)
    - 5.3.3.1 Gather and solicit post-sale customer feedback on products and services (11238)
    - 5.3.3.2 Solicit post-sale customer feedback on ad effectiveness (11239)
    - 5.3.3.3 Analyze product and service satisfaction data and identify improvement opportunities (11240)
    - 5.3.3.4 Provide customer feedback to product management on products and services (11241)

6.0 Develop and Manage Human Capital (10007)

- **6.1 Develop and manage human resources (HR) planning, policies, and strategies (10409)**
  - 6.1.1 Develop human resources strategy (10415)
    - 6.1.1.1 Identify strategic HR needs (10418)
    - 6.1.1.2 Define HR and business function roles and accountability (10419)
    - 6.1.1.3 Determine HR costs (10420)
    - 6.1.1.4 Establish HR measures (10421)
    - 6.1.1.5 Communicate HR strategies (10422)
  - 6.1.2 Develop and implement human resources plans (10416)
    - 6.1.2.1 Gather skill requirements according to corporate strategy and market environment (10423)
    - 6.1.2.2 Plan employee resourcing requirements per unit/organization (10424)
    - 6.1.2.3 Develop compensation plan (10425)
    - 6.1.2.4 Develop succession plan (10426)
    - 6.1.2.5 Develop employee diversity plan (10427)
    - 6.1.2.6 Develop other HR programs (10428)
    - 6.1.2.7 Develop HR policies (10429)
    - 6.1.2.8 Administer HR policies (10430)
    - 6.1.2.9 Plan employee benefits (10431)
    - 6.1.2.10 Develop strategy for HR systems/technologies/ tools (10432)
    - 6.1.2.11 Develop work force strategy models (10433)
  - 6.1.3 Monitor and update plans (10417)
    - 6.1.3.1 Measure realization of objectives (10434)

6.1.3.2 Measure contribution to business strategy (10435)
6.1.3.3 Communicate plans and provide updates to stakeholders (10436)
6.1.3.4 Determine value added from HR function (10437)
6.1.3.5 Review and revise HR plans (10438)

6.2 Recruit, source, and select employees (10410)

6.2.1 Create and develop employee requisitions (10439)
6.2.1.1 Align staffing plan to work force plan and business unit strategies/resource needs (10445)
6.2.1.2 Develop and open job requisition (10446)
6.2.1.3 Develop job description (10447)
6.2.1.4 Post requisition (10448)
6.2.1.5 Manage internal/external job posting Web sites (10449)
6.2.1.6 Change//Update requisition (10450)
6.2.1.7 Notify hiring manager (10451)
6.2.1.8 Manage requisition date (10452)

6.2.2 Recruit/Source candidates (10440)
6.2.2.1 Determine recruitment methods (10453)
6.2.2.2 Perform recruiting activities/events (10454)
6.2.2.3 Manage recruitment vendors (10455)

6.2.3 Screen and select candidates (10441)
6.2.3.1 Identify and deploy candidate selection tools (10456)
6.2.3.2 Interview candidates (10457)
6.2.3.3 Test candidates (10458)
6.2.3.4 Select and reject candidates (10459)

6.2.4 Manage pre-placement verification (10442)
6.2.4.1 Complete candidate background information (10460)
6.2.4.2 Conduct pre-employment screening (10461)
6.2.4.3 Recommend/not recommend candidate (10462)

6.2.5 Manage new hire/re-hire (10443)
6.2.5.1 Draw up and make offer (10463)
6.2.5.2 Negotiate offer (10464)
6.2.5.3 Hire candidate (10465)

6.2.6 Track candidates (10444)
6.2.6.1 Create applicant record (10466)
6.2.6.2 Manage/track applicant data (10467)
6.2.6.3 Archive and retain records of non-hires (10468)

6.3 Develop and counsel employees (10411)

6.3.1 Manage employee orientation and deployment (10469)
6.3.1.1 Create/maintain employee on-boarding program (10474)
6.3.1.2 Introduce new employees to managers (10475)
6.3.1.3 Introduce workplace (10476)
6.3.1.4 Evaluate the effectiveness of the employee on-boarding program (11243)

6.3.2 Manage employee performance (10470)
6.3.2.1 Define performance objectives (10479)
6.3.2.2 Review, appraise, and manage employee performance (10480)
6.3.2.3 Evaluate and review performance program (10481)

6.3.3 Manage employee relations (10471)
6.3.3.1 Manage health and safety (10482)
6.3.3.2 Manage labor relations (10483)
6.3.3.3 Manage collective bargaining process (10484)
6.3.3.4 Manage labor management partnerships (10485)

6.3.4 Manage employee development (10472)
6.3.4.1 Develop competency management plans (10486)
6.3.4.2 Define employee development guidelines (10487)
6.3.4.3 Develop employee career plans (10488)
6.3.4.4 Manage employee skills development (10489)

6.3.5 Develop and train employees (10473)
6.3.5.1 Align employee and organization development needs (10490)
6.3.5.2 Develop competencies (10491)
6.3.5.3 Establish training needs by analysis of required and available skills (10492)
6.3.5.4 Develop, conduct, and manage employee and/or management training programs (10493)

6.4 Reward and retain employees (10412)

6.4.1 Develop and manage reward, recognition, and motivation programs (10494)
6.4.1.1 Develop salary/compensation structure and plan (10498)
6.4.1.2 Develop benefits and reward plan (10499)
6.4.1.3 Perform competitive analysis of benefit and rewards (10500)
6.4.1.4 Identify compensation requirements based on financial, benefits, and HR policies (10501)
6.4.1.5 Administer compensation and rewards to employees (10502)
6.4.1.6 Reward and motivate employees (10503)

6.4.2 Manage and administer benefits (10495)
6.4.2.1 Deliver employee benefits program (10504)
6.4.2.2 Administer benefit enrollment (10505)
6.4.2.3 Process claims (10506)
6.4.2.4 Perform benefit reconciliation (10507)

6.4.3 Manage employee assistance and retention (10496)
6.4.3.1 Deliver programs to support work/life balance for employees (10508)
6.4.3.2 Develop family support systems (10509)
6.4.3.3 Review retention and motivation indicators (10510)
6.4.3.4 Review compensation plan (10511)

6.4.4 Administer Payroll (10497)

6.5 Redeploy and retire employees (10413)

6.5.1 Manage promotion and demotion process (10512)
6.5.2 Manage separation (10513)
6.5.3 Manage retirement (10514)
6.5.4 Manage leave of absence (10515)
6.5.5 Develop and implement employee outplacement (10516)

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6.5.6 Manage deployment of personnel (10517)
6.5.7 Relocate employees and manage assignments (10518)
6.5.8 Manage employment reduction and retirement (10519)
6.5.9 Manage expatriates (10520)
6.5.10 Manage employee relocation process (10521)

6.6 Manage employee information (10414)

6.6.1 Manage reporting processes (10522)
6.6.2 Manage employee inquiry process (10523)
6.6.3 Manage and maintain employee data (10524)
6.6.4 Manage human resource information systems (HRIS) (10525)
6.6.5 Develop and manage employee metrics (10526)
6.6.6 Develop and manage time and attendance (10527)
6.6.7 Manage employee communication (10528)
6.6.7.1 Develop employee communication plan (10529)
6.6.7.2 Manage/collect employee suggestions and perform employee research (10530)
6.6.7.3 Manage employee grievances (10531)
6.6.7.4 Publish employee communications (10532)

7.0 Manage Information Technology (10008)

7.1 Manage the business of information technology (10563)

7.1.1 Develop the enterprise IT strategy (10570)
7.1.1.1 Build strategic intelligence (10603)
7.1.1.2 Identify long-term IT needs of the enterprise in collaboration with stakeholders (10604)
7.1.1.3 Define strategic standards, guidelines, and principles (10605)
7.1.1.4 Define and establish IT architecture and development standards (10606)
7.1.1.5 Define strategic vendors for IT components (10607)
7.1.1.6 Establish IT governance organization and processes (10608)
7.1.1.7 Build strategic plan to support business objectives (10609)

7.1.2 Define the enterprise architecture (10571)
7.1.2.1 Establish the enterprise architecture definition (10611)
7.1.2.2 Confirm enterprise architecture maintenance approach (10612)
7.1.2.3 Maintain the relevance of the enterprise architecture (10613)
7.1.2.4 Act as clearinghouse for IT research and innovation (10614)
7.1.2.5 Govern the enterprise architecture (10615)

7.1.3 Manage the IT portfolio (10572)
7.1.3.1 Establish the IT portfolio (10616)
7.1.3.2 Analyze and evaluate the value of the IT portfolio for the enterprise (10617)
7.1.3.3 Provision resources in accordance with strategic priorities (10618)

7.1.4 Perform IT research and innovation (10573)
7.1.4.1 Research technologies to innovate IT services and solutions (10620)
7.1.4.2 Transition viable technologies for IT services and solutions development (10621)

7.1.5 Perform IT financial management (10574)
7.1.5.1 Develop and maintain IT services and solutions cost transparency (10622)
7.1.5.2 Establish and maintain accounting process (10623)
7.1.5.3 Tie project funding to business case decision checkpoints (10624)

7.1.6 Evaluate and communicate IT business value and performance (10575)
7.1.6.1 Establish and monitor key performance indicators (10625)
7.1.6.2 Evaluate IT plan performance (10626)
7.1.6.3 Communicate IT value (10627)

7.1.7 Perform IT staff management (10576)
7.1.7.1 Develop IT leadership and staff (10628)
7.1.7.2 Manage IT staff performance (10629)

7.1.8 Manage IT suppliers and contracts (10577)
7.1.8.1 Develop IT (development and delivery) sourcing strategies (10630)
7.1.8.2 Negotiate with suppliers (10631)
7.1.8.3 Establish and maintain supplier relationships (10632)
7.1.8.4 Evaluate supplier performance (10633)
7.1.8.5 Assess contract performance (10634)

7.2 Develop and manage IT customer relationships (10564)

7.2.1 Develop IT services and solutions strategy (10578)
7.2.1.1 Research IT services and solutions to address business and user requirements (11244)
7.2.1.2 Translate business and user requirements into IT services and solutions requirements (11245)
7.2.1.3 Formulate IT services and solutions strategic initiatives (11246)
7.2.1.4 Coordinate strategies with internal stakeholders to ensure alignment (11247)
7.2.1.5 Evaluate and select IT services and solutions strategic initiatives (11248)

7.2.2 Develop and manage IT service levels (10579)
7.2.2.1 Create and maintain the IT services and solutions catalog (10640)
7.2.2.2 Establish and maintain business and IT service level agreements (10641)

7.2.2.3 Evaluate and report service-level attainment results (10642)
7.2.2.4 Communicate business and IT service-level improvement opportunities (10643)

7.2.3 Perform demand-side management (DSM) for IT services (10580)
7.2.3.1 Analyze IT services and solutions consumption and usage (10644)
7.2.3.2 Develop and implement incentive programs that improve consumption efficiency (10645)
7.2.3.3 Develop volume/unit forecast for IT services and solutions (10646)

7.2.4 Manage IT customer satisfaction (10581)
7.2.4.1 Capture and analyze customer satisfaction (10647)
7.2.4.2 Assess and communicate customer satisfaction patterns (10648)
7.2.4.3 Initiate improvements based on customer satisfaction patterns (10649)

7.2.5 Market IT services and solutions (10582)
7.2.5.1 Develop IT services and solutions marketing strategy (10650)
7.2.5.2 Develop and manage IT customer strategy (10651)
7.2.5.3 Manage IT services and solutions advertising and promotional campaigns (10652)
7.2.5.4 Process and track IT services and solutions orders (10653)

7.3 Manage business resiliency and risk (11216)

7.3.1 Develop and manage business resiliency (11217)
7.3.1.1 Develop the business resilience strategy (11221)
7.3.1.2 Perform continuous business operations planning (11222)
7.3.1.3 Test continuous business operations (11223)
7.3.1.4 Maintain continuous business operations (11224)

7.3.2 Develop and manage regulatory compliance (11218)
7.3.2.1 Develop the regulatory compliance strategy (11225)
7.3.2.2 Establish regulatory compliance controls (11226)
7.3.2.3 Manage regulatory compliance remediation (11227)

7.3.3 Perform integrated risk management (11219)
7.3.3.1 Develop an integrated risk strategy and approach (11228)
7.3.3.2 Manage integrated risks (11229)

7.3.4 Develop and implement security, privacy, and data protection controls (11220)
7.3.4.1 Establish information security, privacy, and data protection strategies and levels (11230)
7.3.4.2 Test, evaluate, and implement information security and privacy and data protection controls (11231)

7.4 Manage enterprise information (10565)

7.4.1 Develop information and content management strategies (10583)
7.4.1.1 Understand information and content management needs and the role of IT services for executing the business strategy (10654)
7.4.1.2 Assess the information and content management implications of new technologies (10655)
7.4.1.3 Identify and prioritize information and content management actions (10656)

7.4.2 Define the enterprise information architecture (10584)
7.4.2.1 Define information elements, composite structure, logical relationships and constraints, taxonomy, and derivation rules (10657)
7.4.2.2 Define information access requirements (10658)
7.4.2.3 Establish data custodianship (10659)
7.4.2.4 Manage changes to content data architecture requirements (10660)

7.4.3 Manage information resources (10585)
7.4.3.1 Define the enterprise information/data policies and standards (10661)
7.4.3.2 Develop and implement data and content administration (10662)

7.4.4 Perform enterprise data and content management (10586)
7.4.4.1 Define sources and destinations of content data (10663)
7.4.4.2 Manage technical interfaces to users of content (10664)
7.4.4.3 Manage retention, revision, and retirement of enterprise information (10665)

7.5 Develop and maintain information technology solutions (10566)

7.5.1 Develop the IT development strategy (10587)
7.5.1.1 Establish sourcing strategy for IT development (10666)
7.5.1.2 Define development processes, methodologies, and tools standards (10667)
7.5.1.3 Select development methodologies and tools (10668)

7.5.2 Perform IT services and solutions life cycle planning (10588)
7.5.2.1 Plan development of new requirements (10669)
7.5.2.2 Plan development of feature and functionality enhancement (10670)
7.5.2.3 Develop life cycle plan for IT services and solutions (10671)

7.5.3 Develop and maintain IT services and solutions architecture (10589)
7.5.3.1 Create IT services and solutions architecture (10672)
7.5.3.2 Revise IT services and solutions architecture (10673)

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7.5.3.3 Retire IT services and solutions architecture (10674)

7.5.4 Create IT services and solutions (10590)
- 7.5.4.1 Understand confirmed requirements (10675)
- 7.5.4.2 Design IT services and solutions (10676)
- 7.5.4.3 Acquire/Develop IT service/solution components (10677)
- 7.5.4.4 Train services and solutions resources (10678)
- 7.5.4.5 Test IT services/solutions (10679)
- 7.5.4.6 Confirm customer acceptance (10680)

7.5.5 Maintain IT services and solutions (10591)
- 7.5.5.1 Understand upkeep/enhance requirements and defect analysis (10681)
- 7.5.5.2 Design change to existing IT service/solution (10682)
- 7.5.5.3 Acquire/develop changed IT service/solution component (10683)
- 7.5.5.4 Test IT service/solution change (10684)
- 7.5.5.5 Retire solutions and services (10685)

7.6 Deploy information technology solutions (10567)

7.6.1 Develop the IT deployment strategy (10592)
- 7.6.1.1 Establish IT services and solutions change policies (10686)
- 7.6.1.2 Define deployment process, procedures, and tools standards (10687)
- 7.6.1.3 Select deployment methodologies and tools (10688)

7.6.2 Plan and implement changes (10593)
- 7.6.2.1 Plan change deployment (10689)
- 7.6.2.2 Communicate changes to stakeholders (10690)
- 7.6.2.3 Administer change schedule (10691)
- 7.6.2.4 Train impacted users (10692)
- 7.6.2.5 Distribute and install change (10693)
- 7.6.2.6 Verify change (10694)

7.6.3 Plan and manage releases (10594)
- 7.6.3.1 Understand and coordinate release design and acceptance (10695)
- 7.6.3.2 Plan release rollout (10696)
- 7.6.3.3 Distribute and install release (10697)
- 7.6.3.4 Verify release (10698)

7.7 Deliver and support information technology services (10568)

7.7.1 Develop IT services and solution delivery strategy (10595)
- 7.7.1.1 Establish sourcing strategy for IT delivery (10699)
- 7.7.1.2 Define delivery processes, procedures, and tools standards (10700)
- 7.7.1.3 Select delivery methodologies and tools (10701)

7.7.2 Develop IT support strategy (10596)
- 7.7.2.1 Establish sourcing strategy for IT support (10702)
- 7.7.2.2 Define IT support services (10703)

7.7.3 Manage IT infrastructure resources (10597)
- 7.7.3.1 Manage IT inventory and assets (10704)
- 7.7.3.2 Manage IT resource capacity (10705)

7.7.4 Manage IT infrastructure operations (10598)
- 7.7.4.1 Deliver IT services and solutions (10706)
- 7.7.4.2 Perform IT operations support services (10707)

7.7.5 Support IT services and solutions (10599)
- 7.7.5.1 Manage availability (10708)
- 7.7.5.2 Manage facilities (10709)
- 7.7.5.3 Manage backup/recovery (10710)
- 7.7.5.4 Manage performance and capacity (10711)
- 7.7.5.5 Manage incidents (10712)
- 7.7.5.6 Manage problems (10713)
- 7.7.5.7 Manage inquiries (10714)

7.8 Manage IT knowledge (10569)

7.8.1 Develop IT knowledge management strategy (10600)
- 7.8.1.1 Understand IT knowledge needs (10715)
- 7.8.1.2 Understand current IT knowledge flow (10716)
- 7.8.1.3 Coordinate strategy and roles with the enterprise KM function (10717)
- 7.8.1.4 Plan IT knowledge management actions and priorities (10718)

7.8.2 Develop and maintain IT knowledge map (10601)
- 7.8.2.1 Define knowledge elements, logical relationships and constraints, and currency rules (10719)
- 7.8.2.2 Identify IT knowledge sources and repositories (10720)
- 7.8.2.3 Identify IT knowledge-sharing opportunities (10721)
- 7.8.2.4 Define IT knowledge processes and approaches (10722)

7.8.3 Manage IT knowledge life cycle (10602)
- 7.8.3.1 Gather knowledge elements from IT knowledge sources (10723)
- 7.8.3.2 Evaluate, create, and codify knowledge elements (10724)
- 7.8.3.3 Deploy codified IT knowledge (10725)
- 7.8.3.4 Update and retire IT knowledge (10726)
- 7.8.3.5 Evaluate and improve IT knowledge strategies and processes (10727)

8.0 Manage Financial Resources (10009)

8.1 Perform planning and management accounting (10728)

8.1.1 Perform planning/budgeting/forecasting (10738)
- 8.1.1.1 Develop and maintain budget policies and procedures (10771)
- 8.1.1.2 Prepare periodic budgets and plans (10772)
- 8.1.1.3 Prepare periodic financial forecasts (10773)

8.1.2 Perform cost accounting and control (10739)
- 8.1.2.1 Perform inventory accounting (10774)
- 8.1.2.2 Perform cost of sales analysis (10775)
- 8.1.2.3 Perform product costing (10776)
- 8.1.2.4 Perform variance analysis (10777)
- 8.1.2.5 Report on profitability (11175)

8.1.3 Perform cost management (10740)
- 8.1.3.1 Determine key cost drivers (10778)
- 8.1.3.2 Measure cost drivers (10779)
- 8.1.3.3 Determine critical activities (10780)
- 8.1.3.4 Manage asset resource deployment and utilization (10781)

8.1.4 Evaluate and manage financial performance (10741)
- 8.1.4.1 Assess customer and product profitability (10782)
- 8.1.4.2 Evaluate new products (10783)
- 8.1.4.3 Perform life cycle costing (10784)
- 8.1.4.4 Optimize customer and product mix (10785)
- 8.1.4.5 Track performance of new-customer and product strategies (10786)
- 8.1.4.6 Prepare activity-based performance measures (10787)
- 8.1.4.7 Manage continuous cost improvement (10788)

8.2 Perform revenue accounting (10729)

8.2.1 Process customer credit (10742)
- 8.2.1.1 Establish credit policies (10789)
- 8.2.1.2 Analyze/approve new account applications (10790)
- 8.2.1.3 Review existing accounts (10791)
- 8.2.1.4 Produce credit/collection reports (10792)
- 8.2.1.5 Reinstate or suspend accounts based on credit policies (10793)

8.2.2 Invoice customer (10743)
- 8.2.2.1 Maintain customer/product master files (10794)
- 8.2.2.2 Generate customer billing data (10795)
- 8.2.2.3 Transmit billing data to customers (10796)
- 8.2.2.4 Post receivable entries (10797)
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- 9.1.2 Develop, construct, and modify sites (10942)
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  - 9.1.4.1 Acquire workspace and assets (10963)
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- 9.2.5 Manage facilities operations (10949)

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  - 9.3.1.2 Develop approach to integrate preventive maintenance into production schedule (10968)
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  - 9.3.2.2 Procure equipment (10970)
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- 9.4.1 Develop exit strategy (10952)
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- 10.2.1 Identify regulatory and stakeholder requirements (11188)
- 10.2.2 Assess future risks and opportunities (11189)
- 10.2.3 Create EHS policy (11190)
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- 10.3.1 Communicate EHS issues to stakeholders and provide support (11192)

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- 10.5.1 Monitor compliance (11198)
- 10.5.2 Perform compliance audit (11199)
- 10.5.3 Comply with regulatory stakeholders' requirements (11200)

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- 10.6.1 Create remediation plans (11201)
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- 10.6.3 Identify/dedicate resources (11203)
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11.2 Manage government and industry relationships (11011)
- 11.2.1 Manage government relations (11038)
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11.3 Manage relations with board of directors (11012)
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- 11.4.3 Develop and perform preventive law programs (11046)
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  - 11.4.5.1 Assess problem and determine work requirements (11056)
  - 11.4.5.2 Engage/retain outside counsel if necessary (11057)
  - 11.4.5.3 Receive strategy/budget (11058)
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11.5 Manage public relations program (11014)
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- 11.5.4 Create press releases (11069)
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  - 12.1.1.3 Set performance targets (11082)
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  - 12.2.3.2 Establish benchmarks (11090)
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  - 12.2.4.2 Establish benchmarks (11093)
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  - 12.3.1.3 Define roles and accountability of core group versus operating units (11102)
  - 12.3.1.4 Develop funding models (11103)
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12.3.1.9 Develop change management approaches (11108)
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12.3.3.4 Identify appropriate KM methodologies (e.g., self-service, communities, transfer) (11119)
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12.4.2.2 Develop change management plans (11153)
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12.4.2.4 Develop communication plan (11155)
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12.4.2.6 Establish metrics (11157)
12.4.2.7 Establish/clarify new roles (11158)
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12.4.3 Implement change (11136)
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12.4.4.1 Monitor improved process performance (11164)
12.4.4.2 Capture and reuse lessons learned from change process (11165)
12.4.4.3 Take corrective action as necessary (11166)

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