AUTOMOTIVE (OEM) PROCESS CLASSIFICATION FRAMEWORK℠

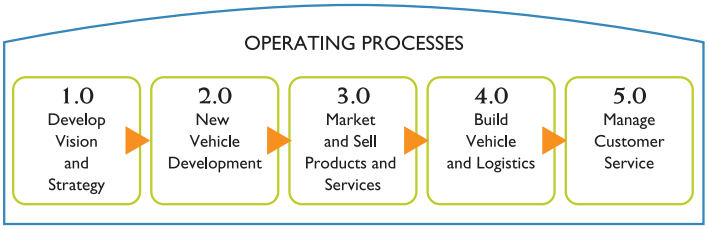
THE AUTOMOTIVE (OEM) PROCESS CLASSIFICATION FRAMEWORK

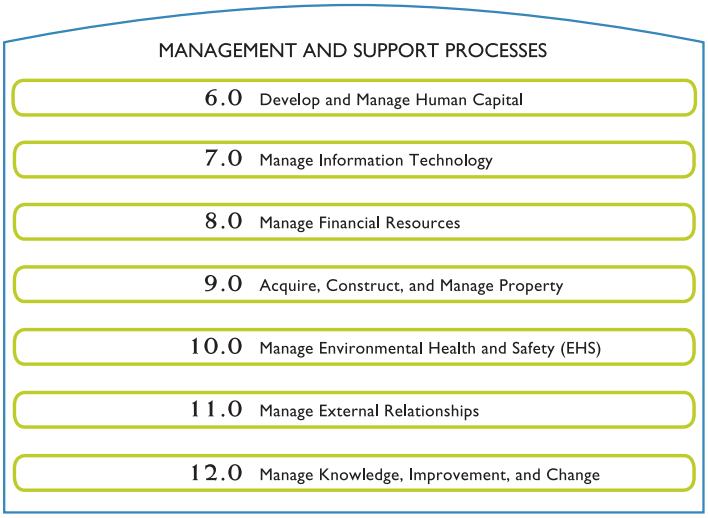
Based on the renowned Process Classification Framework℠ (PCF), a taxonomy of cross-functional business processes intended to allow objective comparison of performance within and among organizations, and the support of IBM, this industry PCF enables more industry applicable content by outlining and defining processes and activities specific to the Automotive (OEM) industry. This allows organizations to choose the framework most relevant to the specific process improvement need, whether it be benchmarking within or across industries, business process management/re-engineering, or content management. The cross-industry PCF and industry PCFs are available on the APQC website at no charge. IBM provided the subject matter expertise and intellectual property to create the industry specific business process classification frameworks, as part of the IBM's continuing leadership in the promotion of open standards to help organizations evaluate and measure business processes at an industry level.

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.

The 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. 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.





HISTORY

The cross-industry 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 classification frameworks.

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8.0 Manage Financial Resources 19
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10.0 Manage Environmental Health and Safety (EHS) 23
11.0 Manage External Relationships 23
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LOOKING FORWARD

The cross industry and industry Process Classification Frameworks are evolving models, 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.

The PCF is written in United States English language format.

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ABOUT IBM

IBM works with its clients to develop new business designs and technical architectures that allow their businesses the flexibility required to compete in a global business landscape. The business is also adjusting its footprint toward emerging geographies, tapping into IBM's double-digit growth, providing the technology infrastructure they need, and taking advantage of the talent pools provided to better service IBM's clients. IBM's major operations comprise a Global Technology Services segment; a Global Business Services segment; a Systems and Technology segment; a Software segment; and a Global Financing segment. For more information, visit: www.ibm.com/soa

THE AUTOMOTIVE (OEM) PROCESS CLASSIFICATION FRAMEWORK℠

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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

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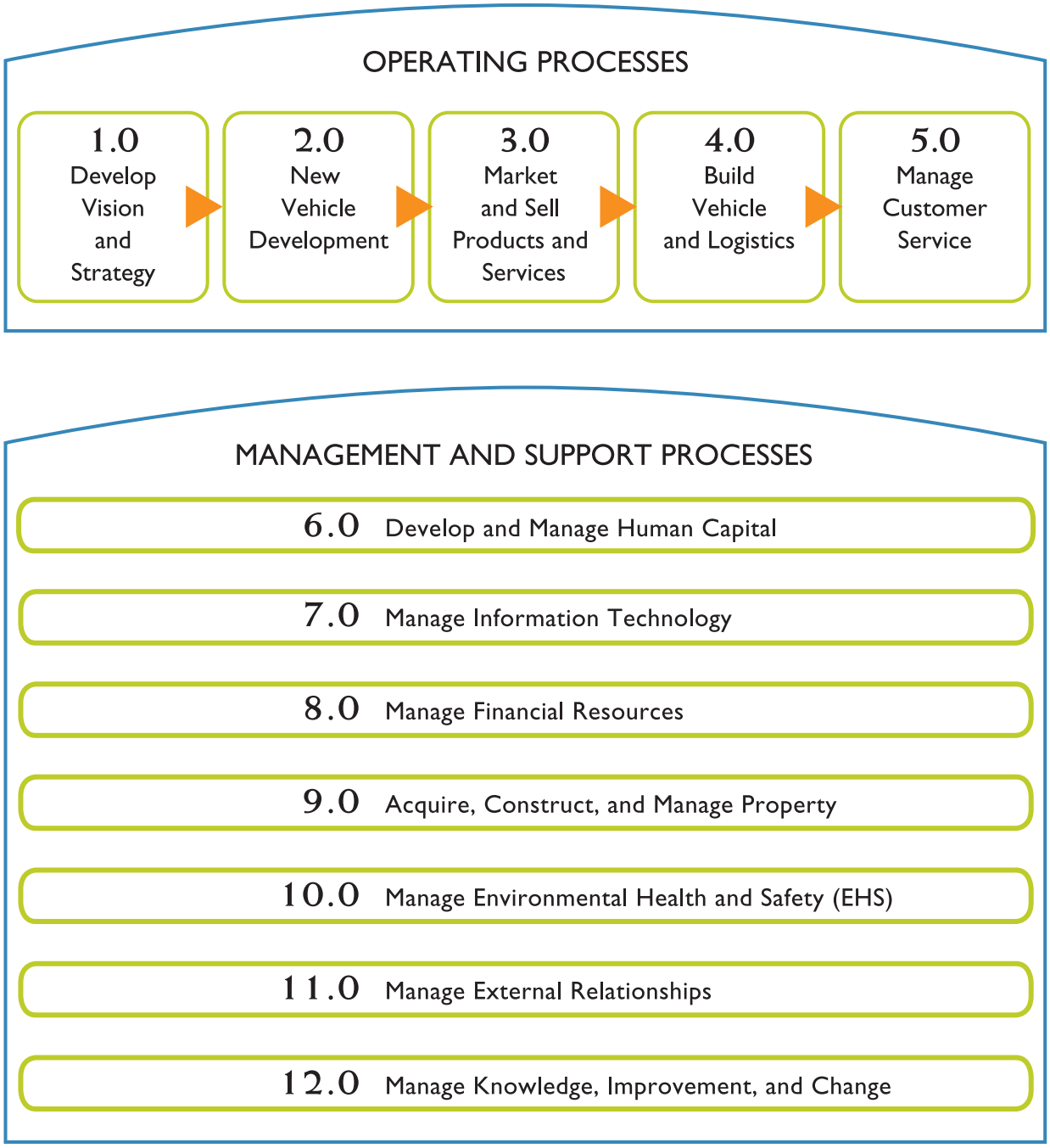

elements used in APQC's Open Standards Benchmarking database. Each process element is referred to by two numbers: a number used to locate the content within that particular framework (in the format 1.2.3.4) and a serial number used to uniquely identify the process element across all of the various Open 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 PCFs, any process element identified as "10015" will have the same scope and definition as a process element of the same number elsewhere, 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.

The Automotive (OEM) PCF is based on the cross-industry PCF Version 5.0.0 released in April 2008.

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 dentify economic trends (10022)
  - 1.1.1.3 dentify 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 dentify 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)
- 1.2.3 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-add 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 New Vehicle Development (12723)

2.1 Strategize and plan portfolio (12219)

- 2.1.1 Develop segment plan (12220)
- 2.1.2 Assess market/segments (12221)
  - 2.1.2.1 Develop business profile (12222)
  - 2.1.2.2 Assess current situation (12223)
  - 2.1.2.3 Develop key performance indicators (12224)
  - 2.1.2.4 Assess supply chain participant positions (12225)
  - 2.1.2.5 Conduct secondary research (12226)
  - 2.1.2.6 Determine market development index (12227)
  - 2.1.2.7 Determine brand development index (12228)
- 2.1.3 Analyze market problems and opportunities (12229)
  - 2.1.3.1 Identify problems (12230)
  - 2.1.3.2 Analyze problems (12231)
  - 2.1.3.3 Identify opportunities (12232)
  - 2.1.3.4 Analyze opportunities (12233)
  - 2.1.3.5 Finalize problems and opportunities (12234)
- 2.1.4 Perform market tracking (12235)
- 2.1.5 Perform market research (12236)
- 2.1.6 Perform competitive benchmarking (12237)
- 2.1.7 Analyze portfolio positioning (12238)
  - 2.1.7.1 Define Computer Aided Engineering (CAE) metrics for full vehicle system and sub system (12339)
  - 2.1.7.2 Analyze Vehicle model in Computer Aided Engineering (CAE) for design improvements (12340)
  - 2.1.7.3 Design for manufacturability/assembly (12341)
  - 2.1.7.4 Consider new manufacturing technologies (12342)
- 2.1.8 Monitor opportunities and threats (12243)

2.2 Setup business objective (create and finalize concepts for new vehicle -Vehicle Synthesis) (12244)

- 2.2.1 Identify and create business plan, objectives and constraints (12245)
  - 2.2.1.1 Create idea ,concept and strategic portfolio management (12246)
  - 2.2.1.2 Finalize customer definition and competitive vehicle field based on confirmation of platform, architecture and program type (new, platform variant, top hat, freshening) (12247)
  - 2.2.1.3 Define key program targets with financials (safety, Noise Vibration and Harshness (NVH), durability requirements/fuel economy (weight, aero and performance)) (12248)
  - 2.2.1.4 Define product content alternatives, packaging feasibility by zone (12249)
  - 2.2.1.5 Create and finalize vehicle project plan and scope: finalize program timeline and content (12250)
  - 2.2.1.6 Identify and leverage mega-trends: identify key vehicle functional objectives, identify strategic vehicle systems (12251)
- 2.2.2 Approve preliminary program specifications (12252)
  - 2.2.2.1 Validate and finalize occupant package (12253)
  - 2.2.2.2 Create initial Bill Of Material (BOM), complete initial Engineering Bill Of Material (EBOM) disclosures, update modules strategy, finalize technical and product feature innovation plan (12254)
  - 2.2.2.3 Finalize power train: define key platform hard points (12255)
  - 2.2.2.4 Select assembly plant: vehicle program timeline (major milestones for marketing, engineering, purchasing and manufacturing identified) (12256)
  - 2.2.2.5 Establish carry-over part strategy: establish initial re-use and preferred parts plan (12257)
  - 2.2.2.6 Identify/establish competitive vehicle targets: Benchmark Center (CBC) opportunities - with investment estimates for all assembly plants being considered (12258)
- 2.2.3 Perform research and development (12259)
  - 2.2.3.1 Develop new technologies (12260)
  - 2.2.3.2 Define new manufacturing processes (12261)
  - 2.2.3.3 Review new materials (12262)
  - 2.2.3.4 Set and validate safety measures (12263)
- 2.2.4 Analyze Computer Aided Engineering (CAE) and select vehicle themes (12264)
  - 2.2.4.1 Complete customer research results (12265)
  - 2.2.4.2 Select/Complete theme assessment and confirm direction set (12266)
  - 2.2.4.3 Select supplier: production sourcing actions meet glide paths (source packages and Purchase Orders (PO) issued) (12267)
  - 2.2.4.4 Develop program targets (12268)
  - 2.2.4.5 Assign resource (% of Allocation) (12269)
- 2.2.5 Finalize and confirm theme (12270)
  - 2.2.5.1 Complete clay models (12271)
  - 2.2.5.2 Approve styling changes from selected themes (12272)
  - 2.2.5.3 Develop business case for mix and match of themes (12273)
  - 2.2.5.4 Validate feasibility and obtain theme sign-off (12274)
  - 2.2.5.5 Estimate vehicle price range (12275)
- 2.2.6 Validate corporate quality requirements (12276)
  - 2.2.6.1 Propose/Define quality targets (12277)
  - 2.2.6.2 Define serviceability index rating (12278)
  - 2.2.6.3 Define vehicle warranty glide path per limits (12279)
  - 2.2.6.4 Certify/Approve production intent racks (12280)
  - 2.2.6.5 Certify/Approve production intent containers (12281)

2.2.7 Develop sourcing strategies (12282)
- 2.2.7.1 Plan for production part approval process (12283)
- 2.2.7.2 Re-analyze global spend (12284)
- 2.2.7.3 Plan for supplier collaboration (12285)
- 2.2.7.4 Create vendor evaluation and monitor plan (12286)
- 2.2.7.5 Create negotiating leveraging factors (12287)
- 2.2.7.6 Evaluate supplier capabilities (12288)
- 2.2.7.7 Manage bidding events (12289)
- 2.2.7.8 Plan for purchase order processing (12290)

2.2.8 Design in-vehicle system (12291)
- 2.2.8.1 Develop concept (12292)
- 2.2.8.2 Plan space and system interfaces (12293)
- 2.2.8.3 Design software (12294)
- 2.2.8.4 Design software interfaces (12295)
- 2.2.8.5 Develop integrate system (12296)
- 2.2.8.6 Manage supplier designs (12297)

2.2.9 Manage program (12298)
- 2.2.9.1 Establish program timing (12299)
- 2.2.9.2 Validate program metrics (12300)
- 2.2.9.3 Monitor program plan (12301)
- 2.2.9.4 Manage teams (12302)
- 2.2.9.5 Develop integrated program plans (12303)

2.3 Engineer/design vehicle (CAD model) (12304)

2.3.1 Create and finalize program specifications (12305)
- 2.3.1.1 Obtain financial approval for the program (12306)
- 2.3.1.2 Receive clay surface definition for engineering (12307)
- 2.3.1.3 Confirm key functional objectives meet appropriate performance levels (12308)
- 2.3.1.4 Complete key system design and process Failure modes and effects - FMEAs (12309)
- 2.3.1.5 Complete production sourcing : actions meet glide paths (source packages and Purchase Orders (Pos) issued) (12310)

2.3.2 Evaluate and select supplier (12311)
- 2.3.2.1 Identify suppliers (12312)
- 2.3.2.2 Certify and validate suppliers (12313)
- 2.3.2.3 Negotiate contracts (12314)
- 2.3.2.4 Create vendor evaluation, monitor plan (12315)

2.3.3 Generate Computer Aided Design (CAD) model (12316)
- 2.3.3.1 Generate part/sub-assemblies/assemblies node no. (12317)
- 2.3.3.2 Generate part-governance logistics (12318)
- 2.3.3.3 Provide part-access to suppliers (12319)

2.3.4 Complete product and process design (12320)
- 2.3.4.1 Develop and release Computer Aided Design (CAD) models (12321)
- 2.3.4.2 Complete product structure management (12322)
- 2.3.4.3 Define quality engineering (12323)
- 2.3.4.4 Create quality assurance and control (12324)
- 2.3.4.5 Create change and configuration management system (12325)
- 2.3.4.6 Create hazardous substance management system (12326)
- 2.3.4.7 Plan for master data management (12327)

2.3.5 Design rules and policies (12328)
- 2.3.5.1 Establish targets and governance (12329)
- 2.3.5.2 Define rules and policies for design (12330)
- 2.3.5.3 Maintain rules and policies (12331)

2.3.6 Manage configuration (12332)
- 2.3.6.1 Validate parts/build combinations (12333)
- 2.3.6.2 Develop bill of materials (12334)

2.4 Improve/validate vehicle design (12335)

2.4.1 Evaluate/Improvise vehicle in virtual space Computer Aided Engineering - CAE (12336)
- 2.4.1.1 Identify vehicle class and Federal Motor vehicle safety standards (FMVSS) and other regulatory requirements (12337)
- 2.4.1.2 Define Corporate Federal Motor vehicle safety standards (FMVSS) requirements and vehicle star rating (12338)
- 2.4.1.3 Define Computer Aided Engineering (CAE) metrics for full vehicle system and sub system (12339)
- 2.4.1.4 Analyze Vehicle model in Computer Aided Engineering (CAE) for design improvements (12340)

2.4.2 Design for manufacturability/assembly (12341)
- 2.4.2.1 Consider new manufacturing technologies (12342)
- 2.4.2.2 Confirm Business Operating Procedures (BOP) alternatives for all assembly plants being considered (12343)
- 2.4.2.3 Identify architectural related manufacturing Principle Locating Planes (12344)
- 2.4.2.4 Identify new/modified tooling and equipments needed (12345)
- 2.4.2.5 Verify Concept Digital Development's exterior and interior surfaces feasibility (12346)
- 2.4.2.6 Establish plant key process Process Failure mode and effect analysis - PFMEA (12347)
- 2.4.2.7 Complete digital assembly and discovery issues (12348)
- 2.4.2.8 Identify S0, S1, S2 development quality gates build plan and location (12349)
- 2.4.2.9 Complete manufacturing process definition template (12350)
- 2.4.2.10 Interface manufacturing equipment/tooling part models in PDM (12351)
- 2.4.2.11 Approve/Accept Design Failure Mode and Effect Analysis (DFMEA)/Process Failure mode and effect analysis (PFMEA) on key components/systems (12352)
- 2.4.2.12 Complete control plan and mistake proofing (12353)
- 2.4.2.13 Review surface quality verification - black body (12354)
- 2.4.2.14 Complete Body In White (BIW) dimensional compliance (12355)

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2.4.2.15 Check torque capability (12356)
2.4.2.16 Complete initial weld set-up certification (12357)
2.4.2.17 Perform stamping simulation (12358)
2.4.2.18 Formulate process design (12359)

2.4.3 Design for shipping /transportation (12360)
2.4.3.1 Create plan for shipping (12361)
2.4.3.2 Create rack/container availability details (12362)
2.4.3.3 Simulate transportation by simulating parts in rack and container (12363)

2.4.4 Design and build tools (12364)
2.4.4.1 Perform tool analysis based part/system vehicle design (12365)
2.4.4.2 Create initial tool prototypes (12366)
2.4.4.3 Validate parts of a tool (12367)
2.4.4.4 Create production tools (12368)

2.5 Build prototype/mule (12369)

2.5.1 Build prototype - stage I (12370)
2.5.1.1 Confirm stage I build readiness (12371)
2.5.1.2 Plan for system and component design verification test (12372)
2.5.1.3 Complete initial marketing launch plan (12373)
2.5.1.4 Revise product and program timing targets (glide path) (12374)
2.5.1.5 Plan for prototyping and ramp-up (12375)

2.5.2 Build prototype - stage II (12376)
2.5.2.1 Confirm stage II pilot build readiness (12377)
2.5.2.2 Complete systems and components off production tooling and assembly processes (12378)
2.5.2.3 Validate build tolerance (create lock option introduction mix) (12379)
2.5.2.4 Create system and component process verification testing (12380)
2.5.2.5 Resolve stage I open issues (12381)
2.5.2.6 Define plan to incorporate all open stage I prototype solutions in stage II build (12382)

2.5.3 Build pre-launch - stage III (12383)
2.5.3.1 Confirm stage III pilot build readiness (12384)
2.5.3.2 Build saleable vehicles (12385)
2.5.3.3 Evaluate quality plan to target (12386)
2.5.3.4 Create containment assessment and release plan (12387)
2.5.3.5 Confirm product readiness (12388)
2.5.3.6 Confirm assembly plant readiness (12389)
2.5.3.7 Complete vendor evaluation and monitoring plan (12390)

2.6 Test/verify vehicle functional requirements (12391)

2.6.1 Test vehicle and supplier durability, crash, NVH and ride and drive characteristics (12392)
2.6.1.1 Identify vehicles for testing (12393)
2.6.1.2 Define corporate FMVSS requirements and vehicle star rating as targets (12394)
2.6.1.3 Define new procedures/identify standard test procedures for full system and sub system (12395)
2.6.1.4 Perform durability test in proving ground and road simulator (12396)
2.6.1.5 Perform crash test (12397)
2.6.1.6 Perform NVH test (12398)
2.6.1.7 Perform seat/airbag test (12399)

2.6.2 Manage design change (12400)
2.6.2.1 Create a change notice or work order for design change request (12401)
2.6.2.2 Capture the design change as a different revision (12402)
2.6.2.3 Manage change (12403)

2.6.3 Prepare vehicles and obtain regulatory certifications (12404)
2.6.3.1 Prepare vehicles for sub-system testing (12405)
2.6.3.2 Release results to media (12406)

2.6.4 Obtain approval for test and ride (12407)
2.6.4.1 Obtain approval from senior management for final overall vehicle test and ride (12408)
2.6.4.2 Release results to media (12409)

3.0 Market and Sell Products and Services (10004)

3.1 Develop marketing, distribution, and channel strategy-forecast and analyze demand (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)
- 3.1.3 Develop and manage brands (12410)
  - 3.1.3.1 Develop marketing strategy for new & existing brands (12411)
  - 3.1.3.2 Define offering and brand equity position (12412)
  - 3.1.3.3 Assess brand performance management (12413)
- 3.1.4 Define and manage channel strategy (12414)
- 3.1.5 Aggregate and manage customer marketing (12415)
- 3.1.6 Conduct product planning clinics (12416)
- 3.1.7 Collect demand information (12418)
- 3.1.8 Create customer profiles (12417)
- 3.1.9 Develop unconstrained forecast (12419)
- 3.1.10 Develop constrained forecast (12420)

3.2 Develop marketing strategy (10102)

- 3.2.1 Define offering and customer's 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 and shape offering to optimize 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)
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  - 4.1.5.3 Publish planned receipts schedules (12512)
  - 4.1.5.4 Plan for post goods receipt, transmit GR references and update inventory (12513)
- 4.1.6 Plan for inbound parts (12514)
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4.2.1.6 Confirm production (12523)
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4.2.2.1 Perform preventive maintenance (12525)
4.2.2.2 Perform corrective maintenance (12526)
4.2.2.3 Analyze and report manufacturing operations (12527)
4.2.2.4 Obtain, install and maintain equipment (12528)
4.2.2.5 Manage tools/crib (12529)
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4.2.6.3 Assemble and package product (12564)
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4.2.6.5 Manage alerts (12566)
4.2.6.6 Manage manufacturing order management (12567)
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4.3.1.4 Develop and maintain delivery service policy (10346)
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4.3.3.3 Track product availability (10355)
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4.3.3.6 Track third-party logistics storage and shipping performance (10358)
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4.3.4 Operate outbound transportation (10341)
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4.3.4.3 Manage transportation fleet (10362)
4.3.4.4 Process and audit carrier invoices and documents (10363)
4.3.4.5 Manage returns; manage reverse logistics (10342)

4.3.5 Manage returns; manage reverse logistics (10364)
4.3.5.1 Authorize and process returns (10365)
4.3.5.2 Perform reverse logistics (10366)
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4.4.1 Forecast for manufacturing planning (12571)
4.4.1.1 Create manufacturing demand planning (12572)
4.4.1.2 Create model-mix planning and sequencing (12573)

4.4.2 Plan and simulate manufacturing (12574)
4.4.2.1 Complete material requirements planning (12575)
4.4.2.2 Create processing delivery schedules (12576)
4.4.2.3 Issue purchase orders (12577)
4.4.2.4 Perform rapid requirement planning (12578)
4.4.2.5 Plan production completion and delivery (12579)

4.4.3 Plan for plant human resource (12580)
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- 4.4.3.2 Identify additional resources needed and the additional shifts (12582)

4.4.4 Plan for plant safety (12583)
- 4.4.4.1 Identify existing safety concerns (12584)
- 4.4.4.2 Plan for securing the safety concern (12585)

4.4.5 Set targets for manufacturing (12586)
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- 4.4.5.3 Identify compliance to production cell readiness (12589)
- 4.4.5.4 Set run-at-rate (12590)

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- 4.4.6.1 Review production practices (12592)
- 4.4.6.2 Establish new practices (12593)
- 4.4.6.3 Develop long range production strategy (12594)

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- 4.4.7.1 Define production governance (12596)
- 4.4.7.2 Oversee manufacturing product (12597)
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4.5 Validate quality targets (12634)

4.5.1 Validate corporate quality requirements (12600)
- 4.5.1.1 Propose/define quality targets (12601)
- 4.5.1.2 Define serviceability index rating (12602)
- 4.5.1.3 Define vehicle warranty glide path per limits (12603)
- 4.5.1.4 Certify/approve production intent racks (12604)
- 4.5.1.5 Certify/approve production intent containers (12605)

4.5.2 Validate supplier quality (12606)
- 4.5.2.1 Complete purchased parts Process Failure Mode and Effect Analysis - PFMEA (12607)
- 4.5.2.2 Complete process validation testing (12608)
- 4.5.2.3 Define/implement product and process error/mistake proofing (12609)
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4.5.3 Manage quality (12613)
- 4.5.3.1 Establish quality targets (12614)
- 4.5.3.2 Monitor quality (12615)
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- 4.5.3.4 Improve quality continuously (12617)

4.6 Production monitoring (12618)

4.6.1 Assess Master Production Schedule (MPS) and Manufacturing Resource Planning (MRP) performance (12619)
- 4.6.1.1 Establish appropriate performance measures (12620)
- 4.6.1.2 Establish monitoring frequency (12621)
- 4.6.1.3 Calculate performance measures (12622)
- 4.6.1.4 Identify performance trends (12623)
- 4.6.1.5 Identify issues/problems with performance (12624)
- 4.6.1.6 Prepare appropriate reports (12625)
- 4.6.1.7 Develop action plan to improve performance (12626)

4.6.2 Assess procurement performance (12627)
- 4.6.2.1 Establish key performance indicators (metrics) (12628)
- 4.6.2.2 Establish monitoring frequency (12629)
- 4.6.2.3 Calculate performance results (12630)
- 4.6.2.4 Identify performance trends (12631)
- 4.6.2.5 Analyze performance benchmark gaps (12632)
- 4.6.2.6 Generate appropriate reports (12633)

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5.0 Manage Customer Service (10006)

5.1 Develop post vehicle sale, customer care/customer service strategy (12635)

- 5.1.1 Develop customer service segmentation/ prioritization (e.g., tiers) (10381)
- 5.1.2 Define customer service policies and procedures (10382)
- 5.1.3 Establish service levels for customers (10383)
  - 5.1.3.1 Determine warranty policies vs. goodwill practices (12636)
- 5.1.4 Integrate dealer standards into customer care practices (12637)
- 5.1.5 Develop after-sales part and service plan (12638)
- 5.1.6 Assess market and strategy (12639)
- 5.1.7 Track markets (12640)
- 5.1.8 Research markets (12641)
- 5.1.9 Perform competitive bench-marking (12642)

5.2 Plan and manage customer service operations (10379)

- 5.2.1 Manage customer service requests/inquiries (10388)
  - 5.2.1.1 Receive customer requests/inquiries (10394)
  - 5.2.1.2 Route customer requests/inquiries (10395)
  - 5.2.1.3 Respond to customer requests/inquiries (10396)
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  - 5.2.2.1 Receive customer complaints (10397)
  - 5.2.2.2 Route customer complaints (10398)
  - 5.2.2.3 Resolve customer complaints (10399)

5.3 Perform after-sales installations and repairs i.e. vehicle service (12643)

- 5.3.1 Determine dealer installed accessory and installations (12644)
- 5.3.2 Develop/distribute service procedures (12645)
- 5.3.3 Develop service technology, parameters (12646)
- 5.3.4 Train service providers (12647)
- 5.3.5 Define service attributes to the dealers (12648)
- 5.3.6 Resolve technical issues (12649)
- 5.3.7 Resolve collision issues (12650)

5.4 Measure and evaluate customer service operations (10380)

- 5.4.1 Measure customer satisfaction with customer requests/inquiries handling (10401)
  - 5.4.1.1 Solicit customer feedback on customer service experience (10405)
  - 5.4.1.2 Analyze customer service data and identify improvement opportunities (10406)
- 5.4.2 Measure customer satisfaction with customer-complaint handling and resolution (10402)
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  - 5.4.2.2 Analyze customer complaint data and identify improvement opportunities (11237)
- 5.4.3 Measure customer satisfaction with products and services (10403)
  - 5.4.3.1 Gather and solicit post-sale customer feedback on products and services (11238)
  - 5.4.3.2 Solicit post-sale customer feedback on ad effectiveness (11239)
  - 5.4.3.3 Analyze product and service satisfaction data and identify improvement opportunities (11240)

5.5 Train and manage customer service work force (NEW) (12651)

- 5.5.1 Develop training and certification standards (NEW) (12652)
  - 5.5.1.1 Manage OEM wholesale service support staff training and business practices (AUTO) (12653)
  - 5.5.1.2 Work with dealer service advisor and technicians for proper training (AUTO) (12654)
- 5.5.2 Evaluate quality of customer interaction with customer service representatives (12655)
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5.6 Manage warranties (12658)

- 5.6.1 Develop warranty claim transaction (12659)
  - 5.6.1.1 Interface with customer (12660)
  - 5.6.1.2 Perform service (12661)
  - 5.6.1.3 Prepare and submit transaction (12662)
  - 5.6.1.4 Initiate a job card (12663)
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  - 5.6.2.1 Establish and maintain transaction preparation parameters (12666)
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- 5.6.3 Process claim, adjustments, approvals and other service events (12669)
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  - 5.6.3.2 Validate transaction (12671)
- 5.6.4 Manage warranty experience (12672)
  - 5.6.4.1 Establish and communicate policies (12673)
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5.7 Manage quality (12679)

- 5.7.1 Identify quality management (12680)
- 5.7.2 Train and manage customer service work force (NEW) (12651)
- 5.7.3 Analyze early warning data (12682)
- 5.7.4 Provide feedback to enterprise (12683)
- 5.7.5 Regulatory compliance (12684)

5.8 Manage parts (12685)

- 5.8.1 Manage inventory (12686)
- 5.8.2 Manage electronic parts catalog (12687)
- 5.8.3 Exchange parts/locate parts (12688)
- 5.8.4 Manage returns (12689)
- 5.8.5 Rebuild part (12690)
- 5.8.6 Manage parts retail operations (12691)

5.9 Service parts (12692)

- 5.9.1 Service parts planning (12693)
  - 5.9.1.1 Design strategic supply chain (12694)
  - 5.9.1.2 Plan parts demand (12695)
  - 5.9.1.3 Plan parts inventory (12696)
  - 5.9.1.4 Plan parts supply (12697)
  - 5.9.1.5 Plan parts distribution (12698)
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  - 5.9.1.7 Monitor and control supply chain (12700)
  - 5.9.1.8 Monitor parts (12701)
- 5.9.2 Perform service parts execution (12702)
  - 5.9.2.1 Process parts purchase order (12703)
  - 5.9.2.2 Process inbound parts and confirm receipt (12704)
  - 5.9.2.3 Perform warehousing and storage (12705)
  - 5.9.2.4 Maintain physical inventory (12706)
  - 5.9.2.5 Perform parts cross-docking (12707)
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  - 5.9.2.12 Process product service letter (12714)
  - 5.9.2.13 Monitor and control supply chain (12715)

5.10 Manage end-of-life vehicle (12716)

- 5.10.1 Manage take-back centers (12717)
- 5.10.2 Dismantle vehicles (12718)
- 5.10.3 Track vehicle parts (12719)
- 5.10.4 Recycle vehicle parts (12720)
- 5.10.5 Ship hazardous material (12721)
- 5.10.6 Provide government reporting (12722

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)
  - 6.1.1.6 Participate in formulation of corporate business strategies (12725)
  - 6.1.1.7 Identify organizational strategic HR needs aligned to corporate business strategies (12726)
- 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 workforce strategy models (10433)
  - 6.1.2.12 Develop project resource plan (12727)
  - 6.1.2.13 Develop HR program management office (PMO) (12728)
- 6.1.3 Monitor and update plans (10417)
  - 6.1.3.1 Define metrics and measures for success (12729)
  - 6.1.3.2 Measure realization of objectives (10434)
  - 6.1.3.3 Measure contribution to business strategy (10435)
  - 6.1.3.4 Communicate plans and provide updates to stakeholders (10436)
  - 6.1.3.5 Determine value added from HR function (10437)
  - 6.1.3.6 Review and revise HR plans (10438)

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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 workforce plan and business unit strategies/resource needs (10445)
  - 6.2.1.2 Develop and open job requisition (10446)
  - 6.2.1.3 Develop a 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 Conduct drug test and physicals as appropriate (12730)
  - 6.2.4.4 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)
- 6.2.7 Measure staffing performance (12731)
  - 6.2.7.1 Determine appropriate metrics and tools (12732)
  - 6.2.7.2 Track metrics (12733)

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 executive compensation structure and plan (12734)
  - 6.4.1.3 Develop benefits and reward plan (10499)
  - 6.4.1.4 Perform competitive analysis of benefit and rewards (10500)
  - 6.4.1.5 Identify compensation requirements based on financial, benefits, and HR policies (10501)
  - 6.4.1.6 Administer compensation and rewards to employees (10502)
  - 6.4.1.7 Develop and administer metrics/measurement methods to gauge success of reward and motivation programs (12735)
- 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)
  - 6.4.2.5 Manage health care costs (12736)
- 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 Payroll administration (10497)

6.5 Re-deploy and retire employees (10413)

- 6.5.1 Manage promotion and demotion process (10512)
- 6.5.2 Manage transfer, move and bid/bump process (12737)
- 6.5.3 Manage separation (10513)
- 6.5.4 Manage retirement (10514)
- 6.5.5 Manage leave of absence (10515)
- 6.5.6 Develop and implement employee outplacement (10516)
- 6.5.7 Manage deployment of personnel (10517)
- 6.5.8 Relocate employees and manage assignments (10518)
- 6.5.9 Manage employment reduction and retirement (10519)
- 6.5.10 Manage expatriates (10520)
- 6.5.11 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 Publish employee communications (10532)
  - 6.6.7.4 Conduct employee research (i.e. employee survey processes, etc.) (12738)

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)

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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 resilience (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)
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)

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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)
- 8.2.2.5 Resolve customer billing inquires (10798)

8.2.3 Process accounts receivable (AR) (10744)

- 8.2.3.1 Establish AR policies (10799)
- 8.2.3.2 Receive/Deposit customer payments (10800)
- 8.2.3.3 Apply cash remittances (10801)
- 8.2.3.4 Prepare AR reports (10802)
- 8.2.3.5 Post AR activity to the general ledger (10803)

8.2.4 Manage and process collections (10745)

- 8.2.4.1 Establish policies for delinquent accounts (10804)
- 8.2.4.2 Analyze delinquent account balances (10805)
- 8.2.4.3 Correspond/Negotiate with delinquent accounts (10806)
- 8.2.4.4 Discuss account resolution with internal parties (10807)
- 8.2.4.5 Process adjustments/write-off balances (10808)

8.2.5 Manage and process adjustments/deductions (10746)

- 8.2.5.1 Establish policies/procedures for adjustments (10809)
- 8.2.5.2 Analyze adjustments (10810)
- 8.2.5.3 Correspond/Negotiate with customer (10811)
- 8.2.5.4 Discuss resolution with internal parties (10812)
- 8.2.5.5 Prepare chargeback invoices (10813)
- 8.2.5.6 Process related entries (10814)
- 8.2.5.7 Perform market settlement, data exchange, reconciliation, and validation (12739)

8.3 Perform general accounting and reporting (10730)

8.3.1 Manage policies and procedures (10747)

- 8.3.1.1 Negotiate service level agreements (10815)
- 8.3.1.2 Establish accounting policies (10816)
- 8.3.1.3 Set and enforce approval limits (10817)
- 8.3.1.4 Establish common financial systems (10818)

8.3.2 Perform general accounting (10748)

- 8.3.2.1 Maintain chart of accounts (10819)
- 8.3.2.2 Process journal entries (10820)
- 8.3.2.3 Process allocations (10821)
- 8.3.2.4 Process period end adjustments (e.g., accruals, currency conversions, etc.) (10822)
- 8.3.2.5 Post and reconcile intercompany transactions (10823)
- 8.3.2.6 Reconcile GL accounts (10824)
- 8.3.2.7 Perform consolidations and process eliminations (10825)
- 8.3.2.8 Prepare trial balance (10826)
- 8.3.2.9 Prepare and post management adjustments (10827)

8.3.3 Perform fixed asset accounting (10749)

- 8.3.3.1 Establish fixed asset policies and procedures (10828)
- 8.3.3.2 Maintain fixed asset master data files (10829)
- 8.3.3.3 Process and record fixed asset additions and retires (10830)
- 8.3.3.4 Process and record fixed asset adjustments, enhancements, revaluations, and transfers (10831)
- 8.3.3.5 Process and record fixed asset maintenance and repair expenses (10832)
- 8.3.3.6 Calculate and record depreciation expense (10833)
- 8.3.3.7 Reconcile fixed asset ledger (10834)
- 8.3.3.8 Track fixed assets including physical inventory (10835)

8.3.3.9 Provide fixed asset data to support tax, statutory, and regulatory reporting (10836)

8.3.4 Perform financial reporting (10750)
- 8.3.4.1 Prepare business unit financial statements (10837)
- 8.3.4.2 Prepare consolidated financial statements (10838)
- 8.3.4.3 Perform business unit reporting/review management reports (10839)
- 8.3.4.4 Perform consolidated reporting/review of cost management reports (10840)
- 8.3.4.5 Prepare statements for board review (10841)
- 8.3.4.6 Produce quarterly/annual filings and shareholder reports (10842)
- 8.3.4.7 Produce regulatory reports (10843)

8.4 Manage fixed asset project accounting (10731)

8.4.1 Perform capital planning and project approval (10751)
- 8.4.1.1 Develop capital investment policies and procedures (10844)
- 8.4.1.2 Develop and approve capital expenditure plans and budgets (10845)
- 8.4.1.3 Review and approve capital projects and fixed asset acquisitions (10846)
- 8.4.1.4 Conduct financial justification for project approval (10847)

8.4.2 Perform capital project accounting (10752)
- 8.4.2.1 Create project account codes (10848)
- 8.4.2.2 Record project-related transactions (10849)
- 8.4.2.3 Monitor and track capital projects and budget spending (10850)
- 8.4.2.4 Close/capitalize projects (10851)
- 8.4.2.5 Measure financial returns on completed capital projects (10852)

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8.5.1 Report time (10753)
- 8.5.1.1 Establish policies and procedures (10853)
- 8.5.1.2 Collect and record employee time worked (10854)
- 8.5.1.3 Analyze and report paid and unpaid leave (10855)
- 8.5.1.4 Monitor regular, overtime, and other hours (10856)
- 8.5.1.5 Analyze and report employee utilization (10857)

8.5.2 Manage pay (10754)
- 8.5.2.1 Enter employee time worked into payroll system (10858)
- 8.5.2.2 Maintain and administer employee earnings information (10859)
- 8.5.2.3 Maintain and administer applicable deductions (10860)
- 8.5.2.4 Monitor changes in tax status of employees (10861)
- 8.5.2.5 Process and distribute payments (10862)
- 8.5.2.6 Process and distribute manual checks (10863)
- 8.5.2.7 Process period end adjustments (10864)
- 8.5.2.8 Respond to employee payroll inquires (10865)

8.5.3 Process payroll taxes (10755)
- 8.5.3.1 Calculate and pay applicable payroll taxes (10866)
- 8.5.3.2 Produce and distribute employee annual tax statements (10867)
- 8.5.3.3 File regulatory payroll tax forms (10868)

8.6 Process accounts payable and expense reimbursements (10733)

8.6.1 Process accounts payable (AP) (10756)
- 8.6.1.1 Verify AP pay file with PO vendor master file (10869)
- 8.6.1.2 Maintain/manage electronic commerce (10870)
- 8.6.1.3 Audit invoices and key data in AP system (10871)
- 8.6.1.4 Approve payments (10872)
- 8.6.1.5 Process financial accruals and reversals (10873)
- 8.6.1.6 Process taxes (10874)
- 8.6.1.7 Research/resolve exceptions (10875)
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- 8.6.1.9 Respond to AP inquires (10877)
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- 8.6.1.11 Adjust accounting records (10879)

8.6.2 Process expense reimbursements (10757)
- 8.6.2.1 Establish and communicate expense reimbursement policies and approval limits (10880)
- 8.6.2.2 Capture and report relevant tax data (10881)
- 8.6.2.3 Approve reimbursements and advances (10882)
- 8.6.2.4 Process reimbursements and advances (10883)
- 8.6.2.5 Manage personal accounts (10884)

8.7 Manage treasury operations (10734)

8.7.1 Manage treasury policies and procedures (10758)
- 8.7.1.1 Establish scope and governance of treasury operations (10885)
- 8.7.1.2 Establish and publish treasury policies (10886)
- 8.7.1.3 Develop treasury procedures (10887)
- 8.7.1.4 Monitor treasury procedures (10888)
- 8.7.1.5 Audit treasury procedures (10889)
- 8.7.1.6 Revise treasury procedures (10890)
- 8.7.1.7 Develop and confirm internal controls for treasury (10891)
- 8.7.1.8 Define system security requirements (10892)

8.7.2 Manage cash (10759)
- 8.7.2.1 Manage and reconcile cash positions (10893)
- 8.7.2.2 Manage cash equivalents (10894)
- 8.7.2.3 Process and oversee electronic fund transfers (EFTs) (10895)
- 8.7.2.4 Develop cash flow forecasts (10896)
- 8.7.2.5 Manage cash flows (10897)
- 8.7.2.6 Produce cash management accounting transactions and reports (10898)
- 8.7.2.7 Manage and oversee banking relationships (10899)
- 8.7.2.8 Analyze, negotiate, resolve, and confirm bank fees (10900)

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- 8.7.3 Manage in-house bank accounts (10760)
  - 8.7.3.1 Manage in-house bank accounts for subsidiaries (10901)
  - 8.7.3.2 Manage and facilitate inter-company borrowing transactions (10902)
  - 8.7.3.3 Manage centralized outgoing payments on behalf of subsidiaries (10903)
  - 8.7.3.4 Manage central incoming payments on behalf of subsidiaries (10904)
  - 8.7.3.5 Manage internal payments and netting transactions (10905)
  - 8.7.3.6 Calculate interest and fees for in-house bank accounts (10906)
  - 8.7.3.7 Provide account statements for in-house bank accounts (10907)
- 8.7.4 Manage debt and investment (10761)
  - 8.7.4.1 Manage financial intermediary relationships (10908)
  - 8.7.4.2 Manage liquidity (10909)
  - 8.7.4.3 Manage issuer exposure (10910)
  - 8.7.4.4 Process and oversee debt and investment transactions (10911)
  - 8.7.4.5 Process and oversee foreign currency transactions (10912)
  - 8.7.4.6 Produce debt and investment accounting transaction reports (10913)
- 8.7.5 Manage financial risks (11208)
  - 8.7.5.1 Manage interest rate risk (11209)
  - 8.7.5.2 Manage foreign exchange risk (11210)
  - 8.7.5.3 Manage exposure risk (11211)
  - 8.7.5.4 Develop and execute hedging transactions (11212)
  - 8.7.5.5 Evaluate and refine hedging positions (11213)
  - 8.7.5.6 Produce hedge accounting transactions and reports (11214)
  - 8.7.5.7 Monitor credit (11215)

8.8 Manage internal controls (10735)

- 8.8.1 Establish internal controls, policies and procedures (10762)
  - 8.8.1.1 Establish board of directors and audit committee (10914)
  - 8.8.1.2 Define and communicate code of ethics (10915)
  - 8.8.1.3 Assign roles and responsibility for internal controls (10916)
  - 8.8.1.4 Define business process objectives and risks (11250)
  - 8.8.1.5 Define entity/unit risk tolerances (11251)
- 8.8.2 Operate controls and monitor compliance with internal controls policies and procedures (10763)
  - 8.8.2.1 Design and implement control activities (10917)
  - 8.8.2.2 Monitor control effectiveness (10918)
  - 8.8.2.3 Remediate control deficiencies (10919)
  - 8.8.2.4 Create compliance function (10920)
  - 8.8.2.5 Operate compliance function (10921)
  - 8.8.2.6 Implement and maintain controls-related enabling technologies and tools (10922)
- 8.8.3 Report on internal controls compliance (10764)
  - 8.8.3.1 Report to external auditors (10923)
  - 8.8.3.2 Report to regulators, share/debt-holders, securities exchanges, etc. (10924)
  - 8.8.3.3 Report to third parties (e.g., business partners) (10925)
  - 8.8.3.4 Report to internal management (10926)

8.9 Manage taxes (10736)

- 8.9.1 Develop tax strategy and plan (10765)
  - 8.9.1.1 Develop foreign, national, state and local tax strategy (10927)
  - 8.9.1.2 Consolidate and optimize total tax plan (10928)
  - 8.9.1.3 Maintain tax master data (10929)
- 8.9.2 Process taxes (10766)
  - 8.9.2.1 Perform tax planning/strategy (10930)
  - 8.9.2.2 Prepare returns (10931)
  - 8.9.2.3 Prepare foreign taxes (10932)
  - 8.9.2.4 Calculate deferred taxes (10933)
  - 8.9.2.5 Account for taxes (10934)
  - 8.9.2.6 Monitor tax compliance (10935)
  - 8.9.2.7 Address tax inquiries (10936)

8.10 Manage international funds/consolidation (10737)

- 8.10.1 Monitor international rates (10767)
- 8.10.2 Manage transactions (10768)
- 8.10.3 Monitor currency exposure/hedge currency (10769)
- 8.10.4 Report results (10770)

9.0 Acquire, Construct, and Manage Property (10010)

9.1 Design and construct/acquire non-productive assets (10937)

- 9.1.1 Develop property strategy and long term vision (10941)
  - 9.1.1.1 Confirm alignment of property requirements with business strategy (10955)
  - 9.1.1.2 Assess the external environment (10956)
  - 9.1.1.3 Determine build or buy decision (10957)
- 9.1.2 Develop, construct, and modify sites (10942)
- 9.1.3 Plan facility (10943)
  - 9.1.3.1 Design facility (10958)
  - 9.1.3.2 Analyze budget (10959)
  - 9.1.3.3 Select property (10960)
  - 9.1.3.4 Negotiate terms for facility (10961)
  - 9.1.3.5 Manage construction or modification to building (10962)
- 9.1.4 Provide workspace and assets (10944)
  - 9.1.4.1 Acquire workspace and assets (10963)
  - 9.1.4.2 Change fit/form/function of workspace and assets (10964)

9.2 Maintain non-productive assets (10938)

- 9.2.1 Move people and assets (10945)
  - 9.2.1.1 Relocate people (10965)
  - 9.2.1.2 Relocate material and tools (10966)
- 9.2.2 Repair workplace and assets (10946)
- 9.2.3 Provide preventative maintenance for workplace and assets (10947)
- 9.2.4 Manage security (10948)
- 9.2.5 Manage facilities operations (10949)

9.3 Obtain, install and plan maintenance for productive assets (10939)

- 9.3.1 Develop ongoing maintenance policies for production assets (10950)
  - 9.3.1.1 Analyze assets and predict maintenance requirements (10967)
  - 9.3.1.2 Develop approach to integrate preventive maintenance into production schedule (10968)
- 9.3.2 Obtain and install equipment (10951)
  - 9.3.2.1 Design engineering solution for the manufacturing process (10969)
  - 9.3.2.2 Procure equipment (10970)
  - 9.3.2.3 Install and commission equipment (10971)

9.4 Dispose of productive and non-productive assets (10940)

- 9.4.1 Develop exit strategy (10952)
- 9.4.2 Perform sale or trade (10953)
- 9.4.3 Perform abandonment (10954)

9.5 Manage physical risk (11207)

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10.0 Manage Environmental Health and Safety (EHS) (11179)

10.1 Determine health, safety, and environment impacts (11180)
- 10.1.1 Evaluate environmental impact of products, services, and operations (11186)
- 10.1.2 Conduct health and safety and environmental audits (11187)

10.2 Develop and execute health, safety, and environmental program (11181)
- 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)
- 10.2.4 Record and manage EHS events (11191)

10.3 Train and educate employees (11182)
- 10.3.1 Communicate EHS issues to stakeholders and provide support (11192)

10.4 Monitor and manage health, safety, and environmental management program (11183)
- 10.4.1 Manage EHS costs and benefits (11193)
- 10.4.2 Measure and report EHS performance (11194)
  - 10.4.2.1 Implement emergency response program (11196)
  - 10.4.2.2 Implement pollution prevention program (11197)
- 10.4.3 Provide employees with EHS support (11195)

10.5 Ensure compliance with regulations (11184)
- 10.5.1 Monitor compliance (11198)
- 10.5.2 Perform compliance audit (11199)
- 10.5.3 Comply with regulatory stakeholders requirements (11200)

10.6 Manage remediation efforts (11185)
- 10.6.1 Create remediation plans (11201)
- 10.6.2 Contact and confer with experts (11202)
- 10.6.3 Identify/dedicate resources (11203)
- 10.6.4 Investigate legal aspects (11204)
- 10.6.5 Investigate damage cause (11205)
- 10.6.6 Amend or create policy (11206)

11.0 Manage External Relationships (10012)

11.1 Build investor relationships (11010)
- 11.1.1 Plan, build, and manage lender relations (11035)
- 11.1.2 Plan, build, and manage analyst relations (11036)
- 11.1.3 Communicate with shareholders (11037)

11.2 Manage government and industry relationships (11011)
- 11.2.1 Manage government relations (11038)
- 11.2.2 Manage relations with quasi-government bodies (11039)
- 11.2.3 Manage relations with trade or industry groups (11040)
- 11.2.4 Manage lobby activities (11041)

11.3 Manage relations with board of directors (11012)
- 11.3.1 Report results (11042)
- 11.3.2 Report audit findings (11043)

11.4 Manage legal and ethical issues (11013)
- 11.4.1 Create ethics policies (11044)
- 11.4.2 Manage corporate governance policies (11045)
- 11.4.3 Develop and perform preventative law programs (11046)
- 11.4.4 Ensure compliance (11047)
  - 11.4.4.1 Plan and initiate compliance program (11053)
  - 11.4.4.2 Execute compliance program (11054)
- 11.4.5 Manage outside counsel (11048)
  - 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)
  - 11.4.5.4 Receive work product and manage/ monitor case and work performed (11059)
  - 11.4.5.5 Process payment for legal services (11060)
  - 11.4.5.6 Track legal activity/performance (11061)
- 11.4.6 Protect intellectual property (11049)
  - 11.4.6.1 Manage copyrights and patents (11062)
  - 11.4.6.2 Maintain intellectual property rights and restrictions (11063)
  - 11.4.6.3 Administer licensing terms (11064)
  - 11.4.6.4 Administer options (11065)
- 11.4.7 Resolve disputes and litigations (11050)
- 11.4.8 Provide legal advice/counseling (11051)
- 11.4.9 Negotiate and document agreements/contracts (11052)

11.5 Manage public relations program (11014)
- 11.5.1 Manage community relations (11066)
- 11.5.2 Manage media relations (11067)
- 11.5.3 Promote political stability (11068)
- 11.5.4 Create press releases (11069)
- 11.5.5 Issue press releases (11070)

12.0 Manage Knowledge, Improvement, and Change (10013)

12.1 Create and manage organizational performance strategy (11071)

- 12.1.1 Create enterprise measurement systems model (11075)
  - 12.1.1.1 Establish performance measures (11080)
  - 12.1.1.2 Establish performance monitoring frequency (11081)
  - 12.1.1.3 Set performance targets (11082)
- 12.1.2 Measure process productivity (11076)
- 12.1.3 Measure cost effectiveness (11077)
- 12.1.4 Measure staff efficiency (11078)
- 12.1.5 Measure cycle time (11079)

12.2 Benchmark performance (11072)

- 12.2.1 Conduct performance assessments (11083)
- 12.2.2 Develop benchmarking capabilities (11084)
- 12.2.3 Conduct process benchmarking (11085)
  - 12.2.3.1 Compile & update list of processes & organizations to benchmark (11089)
  - 12.2.3.2 Establish benchmarks (11090)
  - 12.2.3.3 Measure performance against benchmarks (11091)
- 12.2.4 Conduct competitive benchmarking (11086)
  - 12.2.4.1 Compile & update list of processes & organizations to benchmark (11092)
  - 12.2.4.2 Establish benchmarks (11093)
  - 12.2.4.3 Measure performance against benchmarks (11094)
- 12.2.5 Conduct gap analysis to understand the need for and the degree of change needed (11087)
- 12.2.6 Establish need for change (11088)

12.3 Develop enterprise-wide knowledge management (KM) capability (11073)

- 12.3.1 Develop KM strategy (11095)
  - 12.3.1.1 Develop governance model (11100)
  - 12.3.1.2 Establish a central KM core group (11101)
  - 12.3.1.3 Define roles and accountability of the core group versus operating units (11102)
  - 12.3.1.4 Develop funding models (11103)
  - 12.3.1.5 Identify links to key initiatives (11104)
  - 12.3.1.6 Develop core KM methodologies (11105)
  - 12.3.1.7 Assess IT needs and engage IT function (11106)
  - 12.3.1.8 Develop training and communication plans (11107)
  - 12.3.1.9 Develop change management approaches (11108)
  - 12.3.1.10 Develop strategic measures and indicators (11109)
- 12.3.2 Identify and plan KM projects (11097)
  - 12.3.2.1 Identify strategic opportunities to apply KM approach(es) (11116)
  - 12.3.2.2 Identify KM requirements and objectives (11117)
  - 12.3.2.3 Assess culture and readiness for KM approach (11118)
  - 12.3.2.4 Identify appropriate KM methodologies (e.g., self-service, communities, transfer, etc.) (11119)
  - 12.3.2.5 Create business case and obtain funding (11120)
  - 12.3.2.6 Develop project measures and indicators (11121)
- 12.3.3 Design and launch KM projects (11098)
  - 12.3.3.1 Design process for knowledge sharing, capture, and use (11122)
  - 12.3.3.2 Define roles and resources (11123)
  - 12.3.3.3 Identify specific IT requirements (11124)
  - 12.3.3.4 Create training and communication plans (11125)
  - 12.3.3.5 Develop change management plans (11126)
  - 12.3.3.6 Design recognition and reward approaches (11127)
  - 12.3.3.7 Design and plan launch of KM project (11128)
  - 12.3.3.8 Deploy the KM project (11129)
- 12.3.4 Manage the KM project life cycle (11099)
  - 12.3.4.1 Assess alignment with business goals (11130)
  - 12.3.4.2 Evaluate impact of KM (strategy and projects) on measures and outcomes (11131)
  - 12.3.4.3 Promote and sustain activity and involvement (11132)
  - 12.3.4.4 Realign and refresh KM strategy and approaches (11133)

12.4 Manage change (11074)

- 12.4.1 Plan for change (11134)
  - 12.4.1.1 Select process improvement methodology (11138)
  - 12.4.1.2 Assess readiness for change (11139)
  - 12.4.1.3 Determine stakeholders (11140)
  - 12.4.1.4 Engage/Identify champion (11141)
  - 12.4.1.5 Form design team (11142)
  - 12.4.1.6 Define scope (11143)
  - 12.4.1.7 Understand current state (11144)
  - 12.4.1.8 Define future state (11145)
  - 12.4.1.9 Conduct risk analysis (11146)
  - 12.4.1.10 Assess cultural issues (11147)
  - 12.4.1.11 Establish accountability for change management (11148)
  - 12.4.1.12 Identify barriers to change (11149)
  - 12.4.1.13 Determine change enablers (11150)
  - 12.4.1.14 Identify resources and develop measures (11151)

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12.4.2 Design the change (11135)
- 12.4.2.1 Assess connection to other initiatives (11152)
- 12.4.2.2 Develop change management plans (11153)
- 12.4.2.3 Develop training plan (11154)
- 12.4.2.4 Develop communication plan (11155)
- 12.4.2.5 Develop rewards/incentives plan (11156)
- 12.4.2.6 Establish metrics (11157)
- 12.4.2.7 Establish/Clarify new roles (11158)
- 12.4.2.8 Identify budget/roles (11159)

12.4.3 Implement change (11136)
- 12.4.3.1 Create commitment for improvement/change (11160)
- 12.4.3.2 Reengineer business processes and systems (11161)
- 12.4.3.3 Support transition to new roles or exit strategies for incumbents (11162)
- 12.4.3.4 Monitor change (11163)

12.4.4 Sustain improvement (11137)
- 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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