

Section Titles		Page
LM	Leadership and Management	1
LD	Leadership	1
LD10	Governance	1
LD15	Strategic Planning	1
LD20	Ethics and Corporate Social Responsibility	1
LD25	Reputation Management	1
LD30	Crisis Management	1
PM	Practice Management	1
PM10	Relationship Management	1
PM15	Client Service	1
PM20	Practitioner Compliance Monitoring	1
PM25	Legal Project Management	2
AM	Administrative Management	2
AM10	Personnel Management	2
AM15	Policy Development	2
AM20	Planning and Analysis	2
AM25	Information Management	2
AM30	Industry Surveys	2
AM35	Purchasing	2
AM40	Supplier Relationship Management (SRM)	2
AM45	Emergency Preparedness	3
AM50	Business Continuity	3
FN	Finance	4
CC	Credit and Collections	4
CC10	Service Pricing	4
CC15	Invoicing (Billing)	4
CC20	Accounts Receivable	4
CC25	International Finance	4
CC30	Banking Relationships	4
FO	Financial Operations	4
FO10	Accounts Payable	4
FO15	General Accounting	4
FO20	Trust Accounts	4
FO25	Payroll Administration	4
FP	Financial Planning	4
FP10	Budgeting	4

	FP15	Forecasting	4
	FP20	Financial Analysis	4
	FP25	Financial Reporting	4
	FP30	Audit Services	4
	FP35	Capital Management	5
TX		Tax and Compliance	5
	TX10	Tax and Reporting Services	5
	TX15	Regulatory and Compliance Monitoring	5
	TX20	Business Insurances	5
HR		Human Resources	5
	RS	Recruitment and Selection	5
	RS10	Staffing Management	5
	RS15	Recruitment Strategy	5
	RS20	Applicant Recruitment	5
	RS25	Eligibility Review and Certification	5
	CP	Compensation and Payroll	5
	CP10	Reward Management	5
	CP15	Payroll Administration	5
	BN	Benefit Programs	6
	BN10	Insurance Programs	6
	BN15	Retirement Programs	6
	BN20	Non-Compensation Programs	6
	BN25	Mandated Programs	6
	ER	Employment Relationships and Counseling	6
	ER10	Engagement	6
	ER15	Career Planning	6
	ER20	Performance Systems	6
	ER25	Diversity Awareness	6
	ER30	Counseling	6
	ER35	Grievance and Complaint Resolution	6
	ER40	Personnel Records/Files	6
	TD	Training and Development	7
	TD10	Organizational and Employee Development	7
	TD15	Program Development	7
	TD20	Delivery	7
	TD25	Assessments	7
	TD30	Plan Development and Monitoring	7

HA	HR Advisory Services	7
	HA10 Policy Management	7
	HA15 Staffing Management	7
	HA20 Global Human Resources	7
	HA25 Resource Planning	7
	HA30 Employment Advisory Services	7
	HA35 Labor Relations	7
	HA40 Safety and Security	7
BD	Business Development	8
PD	Service Development	8
	PD10 Competitive Intelligence	8
	PD15 Product Analysis	8
	PD20 Product Refinement	8
SL	Sales	9
	SL10 Sales Strategy	9
	SL15 Sales Forecasting	9
	SL20 Interpersonal Relations	9
	SL25 Public (Community) Relations	9
	SL30 Media Relations and Strategy	9
	SL35 Proposals	9
MK	Marketing	8
	MK10 Practitioner Listings and Directories	8
	MK15 Practitioner Honors and Awards	9
	MK20 Database Management (CRM)	9
	MK25 Graphic Design	9
	MK30 Content Management	9
	MK35 Event Planning	9
IT	Information Technology	9
IS	IT Services	9
	IS10 IT Solution Development	9
	IS15 User Support Services	9
II	IT Infrastructure	9
	II10 IT System Integration	9
	II15 Computer Management	9
	II20 Peripheral Management	9
	II25 Network Management	9
IA	Information Systems Administration	9

TI	Tactical Initiatives	10
IG	Information Governance	10
IG10	Information Management	10
IG15	Intellectual Property	10
IG20	Information Security	10
IG25	Information Requests	10
IG30	Mobile Devices/BYOD	10
IG35	Matter Lifecycle Management	10
IG40	Matter Mobility	10
IG45	Records and Information Management (RIM)	10
IG50	Document Preservation and Mandated Destruction	10
IG55	Retention/Disposition	10
RM	Risk Management	10
RM10	Conflicts Analysis	10
RM15	Conflicts Processing	11
RM20	New Business Analysis	11
RM25	New Business Processing	11
RM30	Ethical Walls (Information Barriers)	11
RM35	Professional Liability and Ethics	11
RM40	Practitioner Compliance Monitoring	11
RM45	Regulatory and Compliance Monitoring	11
KM	Knowledge Management	11
KM10	Assess and Evaluate	11
KM15	Strategy and Planning	12
KM20	Implementation	12
KM25	Measure and Report	12
KM30	Maintain and Update	12
BI	Business Intelligence (BI)	13
BI10	Multidimensional Aggregation and Allocation	13
BI15	Denormalization, Tagging and Standardization	13
BI20	Real-time Reporting and Alerts	13
BI25	Unstructured Data Sources	13
BI30	Group Consolidation, Budgeting and Forecasts	13
BI35	Statistical Inference	13
BI40	Probabilistic Simulation	13
BI45	Key Performance Indicators	13
BI50	Version Control	13
BI55	Process Management	13
BI60	Open Item Management	13

PG	Project Management	13
	PG10 Initiation	13
	PG15 Planning and Design	13
	PG20 Execution	13
	PG25 Monitoring and Control	13
	PG30 Closing	13
OE	Operational Excellence (Quality)	14
	OE10 Develop	14
	OE15 Measure	14
	OE20 Assess	14
	OE25 Audit	14
CH	Change Management	14
AS	Administrative Support	14
DS	Document Services	14
	DS10 Document Creation	14
	DS15 Document Management	14
	DS20 Document Reproduction	14
CR	Court and Registration Services	14
	CR10 Court Services	14
	CR15 Docket Maintenance	14
	CR20 Name or Entity Searches	14
	CR25 Notary Services	15
	CR30 Property Services	15
CM	Communication Services	15
	CM10 Electronic Communications Services	15
	CM15 Telecommunications Services	15
	CM20 Facsimile Services	15
MC	Meetings Coordination	15
	MC10 Meeting Logistics	15
	MC15 Meeting Setup	15
	MC20 Meeting Support	15

TR	Travel Management	15
TR10	Travel Planning	15
TR15	Rewards Program Management	15
TR20	Preferred Travel Vendor Management	15
TR25	Group Travel Management	15
TR30	Travel Readiness Management	15
FM	Facilities Management	15
FM10	Operations and Maintenance	15
FM15	Lease Administration	16
FM20	Real Estate and Property Management	16
FM25	Emergency Preparedness	16
FM30	Environmental Stewardship and Sustainability	16
MM	Mail and Messenger Services	16
MM10	Delivery Services	16
MM15	Mail Processing and Review	16

A_Code	Classification				Description/Definition
S_Code	Substantive Area				
C_Code	Category				
P_Code	Process				
LM	Leadership and Management				Processes associated with establishing and sharing a clear vision and the design, execution, and control of operations that convert resources into desired goods and services, and implement a company's business strategy.
LD	Leadership				Establishing and sharing a clear vision, providing the information, knowledge and methods to realize that vision, and coordinating and balancing the conflicting interests of all members and stakeholders.
	LD10	Governance			Establishing policies, and continuous monitoring of their proper implementation, by the members of the governing body of an organization. It includes the mechanisms required to balance the powers of the members (with the associated accountability), and their primary duty of enhancing the prosperity and viability of the organization.
	LD15	Strategic Planning			Formulating objectives, practices and policies aimed at meeting short and long-range organizational needs and opportunities. It includes the strategic planning process, the process of aligning operational plans with the strategic plan, the allocation of resources, and the modification of governance structures to achieve strategic objectives.
	LD20	Ethics and Corporate Social Responsibility			Developing and integrating organizational values and their expression in business decision making and behavior. This emphasizes an organizational codes of ethics but includes relevant legal requirements.
	LD25	Reputation Management			Maintaining or creating a certain frame of mind or brand regarding public perceptions. Reputation management is the process of identifying what other people are saying or feeling about you or your business; assessing the information (analytics); and taking steps to ensure that the general consensus is in line with established goals. Various forms of social media are commonly used to monitor reputations as well as focused efforts such as surveys, interviews, meetings, etc.
	LD30	Crisis Management			Mitigating loss to business operations. Drafting or distributing press statements/releases or otherwise sharing information publicly to limit the impact of negative news such as office closures, key personnel departures, etc.
PM	Practice Management				The design, execution, and control of legal practice operations that convert resources into desired goods and services, and implement a company's business strategy.
	PM10	Relationship Management			Managing and supervising client/customer relationships. It includes assigning of resources, defining scope of work, and establishing the operational and financial terms of service. Includes adherence to defined requirements for reporting, staffing, etc.
		PM10.10	Managing Expectations		Clearly defining the scope of work and the delivery expectations in order to assure client expectations are satisfied.
		PM10.15	Resource Management		Assigning and monitoring resources and personnel adequate to assure client expectations are met and business outcomes are achieved.
		PM10.20	Terms of Service		Assuring both the clients, and the organizations, service and quality requirements are established, monitored and maintained.
		PM10.25	Client Feedback		Obtaining the "voice of the client" utilizing various means (surveys, interviews, assessments, etc.) to assure complete satisfaction for the services provided and that issues are properly identified and appropriately remedied.
	PM15	Client Service			The provision of service to clients before, during and after a purchase. Client service concerns the priority an organization assigns to client service relative to components such as product innovation and pricing.
		PM15.10	Value		Providing services above the regular, routine representation adds value to the client.
		PM15.15	Customer Service		Meeting customer's needs by providing and delivering professional, helpful, high quality service and assistance before, during, and after the customer's requirements are met. Customer service is meeting the needs and desires of any customer. Some characteristics of good customer service include promptness, politeness, professionalism and personalization.
		PM15.20	Professional Services		Recognizing and making appropriate referrals to other services, for example, tax assistance or psychological services, when clients require assistance with matters outside the organizations expertise.
	PM20	Practitioner Compliance Monitoring			Ensuring all practitioners are properly licensed to practice and meet required continuing education (CLE, CPE, etc.) requirements for their practice. It includes associated internal and external reporting requirements.

A_Code	Classification				Description/Definition
S_Code	Substantive Area				
C_Code	Category	P_Code	Process		
	PM25	Legal Project Management			The Specific legal project management methodologies and the planning, organizing, motivating, and controlling resources to achieve specific goals related to legal cases or matters.
	PM25.10	Initiation			Determining the nature and scope of the project. Includes understanding the business environment and ensuring necessary controls are incorporated.
	PM25.15	Planning and Design			Planning time, cost and resources to estimate the work needed and to effectively manage risk during project execution. Includes developing the scope statement, selecting teams, identifying deliverables and activities, estimating resource requirements and time and cost for activities, developing the schedule and budget, risk planning, and gaining formal approval to begin work.
	PM25.20	Execution			Completing the work defined in the project plan. Involves coordinating people and resources, performing the processes within the project plan, and producing deliverables. Also includes directing and managing project execution, assuring quality of deliverables, managing project team, distributing information, managing stakeholder expectations, conducting procurement, and testing deliverables against the initial design.
	PM25.25	Monitoring and Control			Observing project execution, identifying potential problems, taking corrective action, and controlling the execution of the project. Also includes measuring the ongoing project activities, monitoring the project variables (cost, effort, scope, etc.), and identifying corrective actions to address issues and risks.
	PM25.30	Closing			The formal acceptance of the project and its conclusion. Administrative activities include the archiving of the files and documenting lessons learned. Includes completing, settling, and closing each contract (including the resolution of any open items) applicable to the project, and finalizing all activities across all of the process groups to formally close the project.
AM	Administrative Management				The design, execution, and control of personnel and other resources for the purpose of producing and delivering desired goods and services that support the organization's business strategy.
	AM10	Personnel Management			The management and supervision of personnel. Includes supervision of work product quality, work flow, performance assessments, personnel and resource transfers, and facilitating collaboration and team building to maximize productivity.
	AM15	Policy Development			The development, review, and maintenance of basic principles and associated guidelines formulated and enforced by the governing body of an organization, to direct and limit its actions, and those of its employees and agents, in pursuit of the organizations long-term goals and regulatory and compliance requirements.
	AM20	Planning and Analysis			The planning and analysis of operations and personnel including development and implementation of alternative staffing models (outsourcing), staffing analysis (ratios), succession planning and changes to the organizational structure.
	AM25	Information Management			Documenting and managing internal strategic and operational business information. It includes the protection of personally identifiable information (PII or PHI) and the prevention of unauthorized access to organizational information systems and confidential information.
	AM30	Industry Surveys			Collecting and submitting statistical and operation information to facilitate the organization's participation in sponsored industry surveys and analysis programs.
	AM35	Purchasing			Obtaining or buying goods and services. The process includes preparation and processing of a demand as well as the end receipt and approval of payment.
	AM40	Supplier Relationship Management (SRM)			Specifying, obtaining and managing products or services provided by suppliers (includes contractors, subcontractors, vendors and business partners). The purpose of supply management procedures is to keep costs stable and use resources effectively to increase the profits and efficiency of the business or organization.
	AM40.10	Strategy			Defining the long-term strategy and vision for SRM (Supplier Relationship Management) and developing a common understanding of the scope of needed SRM practices including portfolio planning and management and supplier lifecycle concept. Identifying which suppliers are strategic, which are the non-strategic suppliers, and how those groups should be managed differently to assure strategic suppliers are delivering strategic value.
	AM40.15	Business Case			Developing a well-structured argument that captures the reasoning for SRM (Supplier Relationship Management) implementation that focuses on the organization’s most pressing supplier management pain-points and challenges, determining the viability of engaging a service provider versus internal resources, and recognizing the value of applying SRM best practices.

A_Code	Classification		Description/Definition	
	S_Code	Substantive Area		
		C_Code Category P_Code Process		
		AM40.20 Processes and Policies	Developing a common set of processes, policies, and tools governing the on-going day-to-day management of suppliers. It includes the definition of roles and responsibilities for the various aspects of supplier management to bring the right skills and focus and to avoid redundant, non-value added activities.	
		AM40.25 Selection	Defining supplier selection criteria, understanding the supplier lifecycle, and performing analysis of pre-engagement activities. Engaging procurement, legal, and risk management groups during the selection process. It includes the due diligence process, supplier evaluation, and management of the RFI (request for information), ITT (Invitation to Tender), and RFP (Request for Proposal) processes to assure the creation of real accountability and incentives for suppliers to deliver business value.	
		AM40.30 Contracts and Agreement	Developing contractual agreements through the negotiation process to achieve mutually acceptable terms and conditions.	
		AM40.35 Management	Managing the supplier relationship and the delivery of services to meet the needs of the organization to keep costs stable and use resources effectively and efficiently.	
		AM40.40 Performance	Establishing performance assessment criteria, analytics and monitoring of financial and operational performance. It includes working with the supplier on SLA's (service level agreements) and KPI's (key performance indicators) to develop processes that enhance the capabilities of important suppliers to boost performance, direct supplier investment in new services, and assure accountability for performance in areas that drive the most value for the organization.	
		AM40.45 Compliance	Monitoring the contractual relationship, addressing related problems, incorporating necessary changes or modifications in the contract, ensuring both parties meet or exceed each other's expectations, and actively interacting with the supplier to achieve the contract's objective(s). Includes the "transfer" of requirements imposed on the organization by others.	
	AM45	Emergency Preparedness	Preparing for and responding to unplanned events that can cause death or significant injury to employees, customers or the public; shut down your business, disrupt operations, cause physical or environmental damage; or threaten the facilities financial standing or public image.	
		AM45.10 Program Management	The organization, development and administration of preparedness program. It includes the identification of regulations that establish minimum requirements.	
		AM45.15 Planning	Gathering information about hazards and assess risks, conducting a business impact analysis (BIA), and examining ways to prevent hazards and reduce risks. Includes writing a preparedness plan addressing resource management, emergency response, crisis communications, business continuity, information technology, employee assistance, incident management, and training.	
		AM45.20 Implementation	Implementing a preparedness plan addressing resource management, emergency response, crisis communications, business continuity, information technology, employee assistance, incident management, and training.	
		AM45.25 Testing	Plan testing and evaluation. Includes defining different types of exercises, learning how to conduct exercises, and using exercise results to evaluate the effectiveness of the plan.	
		AM45.30 Improvement	Identifying when the preparedness program needs to be reviewed. Discovering methods to evaluate the preparedness program and utilize the review to make necessary changes and plan improvements.	
		AM45.35 Execution	Identifying and assessing an emergency situation and executing an emergency plan.	
	AM50	Business Continuity	Planning, preparation and related activities intended to ensure that during and after a serious incident or disaster an organization's critical business functions will either continue to operate, or will be recovered to an operational state within a reasonably short period.	
		AM50.10 Resilience Design	The design and engineering of critical business functions and the supporting infrastructure in such a way that they are materially unaffected by most disruptions, for example through the use of redundancy and spare capacity.	
		AM50.15 Recovery Preparations	Preparations made to recover or restore critical and less critical business functions that fail for some reason.	

A_Code	Classification			Description/Definition
S_Code	Substantive Area			
	C_Code	Category		
		P_Code	Process	
		AM50.20	Contingency Planning	Developing a generalized capability and readiness to cope effectively with whatever major incidents and disasters occur, including those that were not, and perhaps could not have been, foreseen. Contingency preparations constitute a last-resort response if resilience and recovery arrangements should prove inadequate in practice.
FN	Finance			
				Processes associated with general accounting and financial operations, time entry, billing and collections, accounts payable, expense reports, analyzing money flows, and meeting all reporting, tax, and business operation requirements.
	CC	Credit and Collections		
	CC10	Service Pricing		
	CC15	Invoicing (Billing)		
	CC20	Accounts Receivable		
	CC25	International Finance		
	CC30	Banking Relationships		
	FO	Financial Operations		
	FO10	Accounts Payable		
	FO15	General Accounting		
	FO20	Trust Accounts		
	FO25	Payroll Administration		
	FP	Financial Planning		
FP10	Budgeting			
FP15	Forecasting			
FP20	Financial Analysis			
FP25	Financial Reporting			
FP30	Audit Services			

A_Code	Classification				Description/Definition
S_Code	Substantive Area				
C_Code	Category				
P_Code	Process				
	FP35	Capital Management			Ensuring an organization is able to continue its operations and that it has sufficient ability to satisfy both maturing short-term debt and upcoming operational expenses. The management of working capital involves managing inventories, accounts receivable and payable, and cash.
TX	Tax and Compliance				Meeting all reporting, tax, and business operation requirements.
	TX10	Tax and Reporting Services			Meeting local, state, and federal income, property or other tax and reporting requirements. Includes management of corporate, partner, shareholder, and similar tax and financial reporting requirements.
	TX15	Regulatory and Compliance Monitoring			Ensuring that regulations and sanctions imposed by a government agency are being met. Includes monitoring varying transaction types (cards, wire, ACH, etc.) for potential fraud, abuse or risk payments and meeting both internal and external reporting requirements.
	TX20	Business Insurances			The management of all business insurances other than professional liability (see RM35).
HR	Human Resources				Processes related to searching for and obtaining candidates, employee training and development, various forms of direct and indirect employee compensation, administration of the employer-employee relationship, employee communication, and managing and retaining valuable employees.
RS	Recruitment and Selection				Processes related to searching for and obtaining a pool of potential candidates with the desired knowledge, skills and abilities necessary to effectively conduct the business of the legal operation. Includes processes necessary to effectively facilitate the selection of the most appropriate candidates to fill job vacancies against defined position descriptions and specifications. Affirmative Action, Equal Employment Opportunity and Diversity regulations, programs and policies are integrated into these activities.
	RS10	Staffing Management			Sourcing, recruiting, hiring and retaining the human resources needed to support business objectives. It includes processes for management of pre-employment screening and testing, contingent staffing, retention strategies, recruitment technologies, recruitment process outsourcing, and workforce planning.
	RS15	Recruitment Strategy			Developing and maintaining a recruitment strategy to ensure the organization has the necessary knowledge, skills and abilities (KSA's) to meet current and future strategic and operational requirements. It includes adherence to internal and external (i.e. government, client, customer) staffing requirements (i.e. contractor/sub-contractor requirements, diversity goals, professional credentials, etc.).
	RS20	Applicant Recruitment			Searching for and obtaining a pool of potential candidates with the desired knowledge, skills and abilities and the use of processes and technologies designed to facilitate the applicant recruitment process.
	RS25	Eligibility Review and Certification			The selection of the most appropriate candidates to fill job vacancies against defined position descriptions and specifications. It includes interviews, testing, background checks, verifications, employment eligibility/foreign worker sponsorship activities and credentialing.
CP	Compensation and Payroll				The various forms of direct compensation that employers use to attract, recognize and retain workers. Includes designing and administering compensation models including base pay, differential and incentive pay, and overtime.
	CP10	Reward Management			Analyzing and controlling employee remuneration, compensation and all of the other benefits for the employees. Reward management aims to create and efficiently operate a reward structure for an organization. Reward structure usually consists of pay policy and practices, salary and payroll administration, total reward, minimum wage, executive pay and team reward. It includes monitoring and adherence to guidelines established to prevent discrimination and assure equality of compensation.
	CP15	Payroll Administration			Ensuring that all employees are paid accurately and timely with the correct withholdings and deductions, as designated within the respective legal and regulatory jurisdiction where employment occurs. This includes salary payments, tax withholdings, and deductions from paychecks. This category also includes Accurate and timely payments of taxes and withholdings to applicable governmental agencies and taxing authorities.

A_Code	Classification				Description/Definition
S_Code	Substantive Area				
C_Code	Category	P_Code	Process		
BN	Benefit Programs				Various forms of indirect employee compensation used to attract, recognize and retain workers. It includes designing and administering benefits such as paid leave, insurance, retirement plans and various employee services, as well as various benefits mandated by international, federal, state and local laws and regulations.
	BN10	Insurance Programs			Designing, administering and managing benefit offerings (Medical, LTD, STD, Life, etc.). Includes The transfer of information related to withholding and deduction of insurance costs (when applicable) to processes in the Payroll Administration (CP15) category of the Compensation and Payroll (CP) substantive area.
	BN15	Retirement Programs			Designing, administering and managing retirement income benefit offerings (401(k), profit sharing, defined contribution, etc.). Includes The transfer of information related to withholding and deduction of retirement planning costs (when applicable) to processes in the Payroll Administration (CP15) category of the Compensation and Payroll (CP) substantive area, as well as the Employment Advisory Services (HA30) category of the HR Advisory Services (HA) substantive area where such information is documented.
	BN20	Non-Compensation Programs			Designing, administering and managing non-compensation benefit offerings (paid time off (PTO), wellness, etc.). Includes The transfer of information related to tracking and reporting of non-compensation program information (when applicable) to processes in the Payroll Administration (CP15) category of the Compensation and Payroll (CP) substantive area, as well as the Employment Advisory Services (HA30) category of the HR Advisory Services (HA) substantive area where such information is documented.
	BN25	Mandated Programs			The administration of mandated benefit programs (unemployment, workers’ compensation, etc.).
ER	Employment Relationships and Counseling				Analyzing, developing, implementing and administering the employer-employee relationship. It includes performing continuing evaluation of it; managing employee performance; ensuring that relations with employees comply with applicable international, federal, state and local laws and regulations; and resolving workplace disputes.
	ER10	Engagement			Employee recognition, special service rewards, or similar employee engagement activities.
	ER15	Career Planning			A broad range of services that include individual career counseling, resume and cover letter development, interview training, and job search assistance. It includes identification of education and professional development training needs in conjunction with processes in the Training and Development (TD) substantive area.
	ER20	Performance Systems			The administration and management of evaluation or performance management systems.
	ER25	Diversity Awareness			Understanding the differences and similarities that make individuals unique, such as individual and organizational characteristics, values, beliefs, experiences, backgrounds, preferences and behaviors, as well as how organizations can leverage those qualities in support of business objectives. It includes identification of training needs in conjunction with processes in the Training and Development (TD) substantive area, as well as the development and implementation of policies in the Policy Management (HA10) category of the HR Advisory Services (HA) substantive area.
	ER30	Counseling			Employee actions that focus on a specific incident, a particular aspect of an employee's performance, or the employee's overall performance or conduct.
	ER35	Grievance and Complaint Resolution			The investigation and fair and equitable resolution of complaints, misunderstandings, and grievances for employees, owners, and business partners associated with the organization's business operations.
	ER40	Personnel Records/Files			The maintenance and organization of personnel documents used to determine an employee’s qualifications for employment, promotion, transfer, additional compensation, disciplinary action, or discharge.

A_Code	Classification				Description/Definition
S_Code	Substantive Area				
	C_Code	Category			
	P_Code	Process			
TD	Training and Development				Teaching or developing any skills and knowledge that relate to specific useful and/or required competencies. This may include new hire job training, technology competency, soft skills enhancement, professional development/regulatory compliance education, or employment-related required training.
	TD10	Organizational and Employee Development			Organizational performance and the means by which it develops its human resources. Activities address improving organizational effectiveness and training employees to meet current and future job demands. Also includes change management, coaching, leadership development, succession planning, career development, social networking, measurement systems and outsourcing employee development. Includes the process of knowledge sharing and the transfer of knowledge from departing personnel.
	TD15	Program Development			The development of programs to improve professional, technical, and personal skills and abilities. Also includes development of programs to educate members of legal operations about policies pertaining to harassment, anti-insider trading, diversity and inclusion and other employment-related issues.
	TD20	Delivery			The delivery of programs to improve professional, technical, and personal skills and abilities. Also includes delivery of programs to educate members of legal operations about policies pertaining to harassment, anti-insider trading, diversity and inclusion and other employment-related issues.
	TD25	Assessments			The development and administration of testing methods and systems designed to assess competencies desired or required for employment or advancement within a legal operation.
	TD30	Plan Development and Monitoring			The establishment and maintenance of learning management systems (LMS). It includes development of skill and competency standards desired or required for various populations within the legal operation.
HA	HR Advisory Services				Processes anticipated to help the organization manage and retain valuable employees, and to increase or maintain control over employment issues.
	HA10	Policy Management			The developing, implementing, or revising policies and procedures, including employee handbooks and policy materials, addressing such subjects as conflicts of interest, alternative dispute resolution, confidentiality, trade secrets, intellectual property, restrictive covenants and severance. It includes activities that ensure all members of a legal operation are in compliance with policy-related educational requirements, have sufficient access to policy information, have been made effectively aware of policies and policy changes, and efficiently maintain proof of such activities and compliance actions.
	HA15	Staffing Management			The strategies, tactics and processes for sourcing, recruiting, hiring, retaining, and terminating the human resources needed to support business objectives. Includes processes for management of pre-employment screening and testing, contingent staffing, retention strategies, recruitment technologies, recruitment process outsourcing, staffing metrics, and workforce planning.
	HA20	Global Human Resources			HR operations within the worldwide context—including U.S.-based entities doing business internationally and non-U.S.-based entities operating in their own locale or worldwide. Includes matters such as management of global workforces, expatriation and repatriation, HR practices and laws around the world, and those arising in specific countries and regions. Processes may be integrated with other substantive areas to ensure compliance with international standards, practices and regulations.
	HA25	Resource Planning			Classification plan administration, classification analysis, staffing (ratio) analysis, succession planning, and similar activities. It includes the assessment of temporary, short-term and long-term outsourcing opportunities.
	HA30	Employment Advisory Services			Advising regarding hiring, evaluation, documentation and termination decisions. It includes compensation and retention programs and negotiating and documenting offer letters, employment, consulting, non-compete, non-solicitation and separation agreements and other related documents.
	HA35	Labor Relations			Formal labor-management relations such as protected activities, unfair practices, union organizing, recognition and representation elections as well as collective bargaining and contract administration.
	HA40	Safety and Security			Enterprise and employee safety and security. Includes processes to prevent and/or mitigate loss, risk to or from personnel, threats to its physical assets, damage to its technology and intellectual property, and risks arising from all elements surrounding the work environment.

A_Code	Classification				Description/Definition		
S_Code	Substantive Area						
C_Code	Category						
P_Code	Process						
BD	Business Development				Processes aimed at developing and implementing growth opportunities, and communicating the value of a product, service or brand.		
	PD	Service Development			The creation of products with new or different characteristics that offer new or additional benefits to the customer. Product development may involve modification of an existing product or its presentation, or formulation of an entirely new product that satisfies a newly defined customer want or market niche.		
		PD10	Competitive Intelligence			Collecting and analyzing information about competitors’ strengths and weaknesses in a legal and ethical manner to enhance business decision-making.	
			PD10.10	Market Research			The identification of a specific market and measurement of its size and other characteristics.
			PD10.15	Product Research			The identification of a need or want and the characteristic of the goods or services that will satisfy it.
			PD10.20	Consumer Research			The identification of the preferences, motivations, and buying behavior of the targeted customer.
			PD10.25	Data Collection and Analysis			The collection and analysis of marketing, product, and consumer information from direct observation of the consumers, mail surveys, interviews, and from published sources.
		PD15	Product Analysis			The analysis of products and services to identify new or different characteristics that offer new or additional benefits to the customer.	
		PD20	Product Refinement			The refinement or enhancement of products or services to exploit new or different characteristics that offer new or additional benefits to the customer.	
	SL	Sales			Interpersonal and public interactions with prospects and customers to promote collective or individual abilities, educate regarding specific services being offered or sought, and obtain commitments to acquire said services.		
		SL10	Sales Strategy			A plan on how to go about selling products and services and increasing profits. Sales strategies identify “pitches,” or key points to address when speaking with potential consumers.	
		SL15	Sales Forecasting			The process of estimating future sales to enable informed business decisions and predict short-term and long-term performance. Forecasts can be based on past sales data, industry-wide comparisons, and economic trends.	
		SL20	Interpersonal Relations			The interpersonal interaction (one-on-one meetings, telephone calls, networking, etc.) that you engage in with prospects and customers to promote collective or individual abilities, educate regarding specific services being offered or sought, and obtain commitments (closing) to acquire said services.	
		SL25	Public (Community) Relations			Managing the spread of information between an individual or an organization and the public, generally at no cost, to inform the public, prospective customers, investors, partners, employees and other stakeholders and ultimately persuade them to maintain a certain view about the organization, its leadership, products, or decisions.	
		SL30	Media Relations and Strategy			Linkages with the media personalities and resources that facilitate an organization receiving favorable, timely, and widespread editorial coverage. Use of appropriate media mix to achieve optimum results from an advertising campaign. It includes assessing value or return on investment (ROI) from advertising.	
		SL35	Proposals			The development of responses to panel opportunities, request for proposals (RFPs) or tenders, formal proposals, pitch books or similar documents used to generate new business opportunities.	
			SL35.10	Qualification			Determining the quality and appropriateness of the organization seeking the business opportunity. Alignment with strategic and financial objections are often among considerations.
			SL35.15	Development			The collection of required information and producing the proposal or response in the required format.
			SL35.20	Post-mortems			The review and analysis of results from proposal efforts to learn more about the client's specific needs/wants -- or why the work would not have been awarded to your firm and might never be.
	MK	Marketing			The communication of the value of a product, service or brand to customers or consumers for the purpose of promoting or selling that product, service, or brand.		
		MK10	Practitioner Listings and Directories			Maintaining the accuracy of and participation in listing and directories of practitioner skills, abilities and biographical information.	

A_Code	Classification				Description/Definition
S_Code	Substantive Area				
C_Code	Category				
P_Code	Process				
	MK15	Practitioner Honors and Awards			Obtaining and maintaining accurate information regarding practitioner honors, awards, and recognitions in order to assure appropriate promotion for marketing purposes.
	MK20	Database Management (CRM)			Operating computer programs or database management systems (DBMS) that catalog, index, locate, retrieve, and store data, maintains its integrity, and outputs it in the form desired by a user. Its overall purpose is to organize and manage data, and make it available on demand.
	MK25	Graphic Design			Designing and producing graphical content for internal and external communications including pitches, brochures, reports, fact sheets, posters, web and other marketing materials.
	MK30	Content Management			Managing the strategy, creation and distribution of messages or statements to the public by any means such as print, radio, television, internet, etc.
	MK30.10	Content Strategy			Developing and the strategy governing the development and distribution of messages or statements to the public.
	MK30.15	Content Development			Development of marketing or promotional materials, content and messages.
	MK30.20	Content Distribution			Communicating or making available a message or statement to the public by any means such as print, radio, television, internet, etc.
	MK35	Event Planning			Planning and coordinating events. It includes budgeting, scheduling, staff selection, site selection, acquiring necessary permits, coordinating transportation and parking, arranging for speakers or entertainers, arranging decor, event security, managing invitee lists, catering and emergency plans.
IT	Information Technology				Processes and practices that gauge the end-to-end delivery of IT solutions and those used to manage the composite hardware, software, network resources and services comprising an enterprise IT environment.
IS	IT Services				Processes and practices that gauge the end-to-end delivery of IT solutions rather than their development. These processes measure the operational efficiency of a solution in meeting the service level expectations of the end-user and how technical IT manages these systems to deliver the desired service level.
	IS10	IT Solution Development			Developing, testing and debugging an application or program, or a networking or hardware solution.
	IS15	User Support Services			Providing onsite, remote or helpdesk user support and user account administration. It includes development, use and maintenance of knowledge databases, incident ticketing systems, issue reporting tools and the capture of issue resolutions.
II	IT Infrastructure				The composite hardware, software, network resources and services required for the existence, operation and management of an enterprise IT environment.
	II10	IT System Integration			Joining different subsystems or components into one inter-connected system. It ensures that each integrated subsystem functions as required. It is also used to add value to a system through new functionalities provided by connecting functions of different systems.
	II15	Computer Management			Managing, monitoring and optimizing all computing devices for performance, availability, device security and/or any base operational requirement. Includes manual and automated administrative processes.
	II20	Peripheral Management			Installing, configuring and maintaining internal or external devices that connect directly to a computer but do not contribute to the computer's primary function, such as computation of data. These devices are intended to help end users interface with an information technology system or subsystem.
	II25	Network Management			The administration, operation, and reliable maintenance of computer network systems. Strictly speaking, network management does not include hardware. Rather, it concerns the reliability, accessibility, security, efficiency, capacity, and capabilities of data transfer channels.
IA	Information Systems Administration				Providing guidance on system preferences and implementation, database administration, commissioning/decommissioning/developing systems, and information migration.

A_Code	Classification				Description/Definition
S_Code	Substantive Area				
C_Code	Category			Process	
P_Code					
TI	Tactical Initiatives				Processes associated with a variety of enterprise level tactical initiatives. It includes processes implemented to manage information at an enterprise level; identify, avoid and manage risk; and organize and manage knowledge and expertise.
IG	Information Governance				The multi-disciplinary structures, policies, procedures, processes and controls implemented to manage information at an enterprise level, supporting an organization's immediate and future regulatory, legal, risk, environmental and operational requirements.
IG10	Information Management				Documenting and managing internal strategic and operational business information. It includes controlling access to information and the protection of personally identifiable information (PII or PHI) and confidential information.
IG15	Intellectual Property				Capturing and preserving knowledge and operational, creative, and historical artifacts that hold commercial, business, or strategic value (e.g., marketing and branding materials). It includes knowledge management resources, contact information, business development strategies, strategic plans, case management strategies, financial information, policies and procedures.
IG20	Information Security				Delivering proactive cyber security prevention, protection, and response services. Provides an objective perspective on the current cybersecurity posture of the organization's operational/business networks. Includes management of ethical walls, confidential access controls and the protection of personally identifiable information (PII or PHI).
	IG20.10	Risk and Vulnerability			Securing individual stakeholders against known vulnerabilities and threats by providing mitigation strategies to reduce risk and to aggregate vulnerability data so policy makers can make informed decisions regarding the security and safety of information systems. Includes online assessments performed by security experts, launching targeted trial attacks, and testing incident response plans.
	IG20.15	Cyber Hygiene			Monitoring publicly accessible cyber assets, networks, and systems. Focuses on the general health and wellness of the cyber perimeter by assessing Internet accessible systems for known vulnerabilities and configuration errors on a persistent basis. Program benefits include third-party review, no-cost scanning services, reduced risk, a view of how the assessed network appears to an attacker, and actionable data for quick mitigation/results.
IG25	Information Requests				Responding efficiently, consistently, and appropriately to requests for information, including Request for Proposal (RFP) responses, questionnaires, surveys, counsel guidelines, and audits.
IG30	Mobile Devices/BYOD				Providing guidance on compliance with policies/procedures with respect to acceptable use and security of company-issued and personally owned devices (i.e., “bring your own device” or BYOD).
IG35	Matter Lifecycle Management				Capturing new engagement information that is organized by areas of law and/or practice groups, including engagement documentation and perpetuating the collection/distribution of authoritative information. The process of systematically deactivating matters in matter management systems at the conclusion of formal representations (matter closing) is also part of this umbrella process.
IG40	Matter Mobility				Moving matters and their associated information into and out of law firms or legal departments; triggered by lateral moves, representation terminations, and other events.
IG45	Records and Information Management (RIM)				Creating and periodically revising operational guidelines for managing information assets, including file folder structures and taxonomy.
IG50	Document Preservation and Mandated Destruction				Preserving potentially responsive information, ensuring the suspension of scheduled disposition, and certifying custodial legal hold compliance during the discovery phase of litigation, investigations or audits. Also the destruction of information as mandated by the court or by agreement among parties.
IG55	Retention/Disposition				Applying lifecycle management practices to stored information, enacting disposition as authorized, and applying defensible disposition to legacy information.
RM	Risk Management				The identification, analysis, assessment, control, and avoidance, minimization, or elimination of unacceptable risks. An organization may use risk assumption, risk avoidance, risk retention, risk transfer, or any other strategy (or combination of strategies) in proper management of future events.
RM10	Conflicts Analysis				Analyzing search results and resolving conflict issues by communicating with partners or management and taking agreed upon actions. This would include decisions on whether representations can be accepted.

A_Code	Classification				Description/Definition
S_Code	Substantive Area				
C_Code	Category	P_Code	Process		
	RM15	Conflicts Processing			Reviewing new business requests in relation to conflicts of interest and alignment. Includes communicating with partners or management to clarify potentially inaccurate information, conducting conflict of interest and related searches, and administration of risk assessment and information systems.
	RM20	New Business Analysis			Analyzing prospective engagement information and other business acceptance risk issues, communicating with partners or management, and taking agreed upon actions. This would include producing escalation reports for management for decisions on whether to accept work.
	RM25	New Business Processing			Completing and reviewing new business intake information and processing of new business intake requests. It includes researching new clients/customers (address, passports etc.), reviewing requests in relation to anti-money laundering (AML) and other business acceptance factors, communicating with partners or management to clarify information, and conducting search relating to AML and other business risk. Also includes updating records to reflect changes in parties and scope, approving requests to re-open closed matters, and transferring time between clients and matters, open sub-matters, etc.
	RM30	Ethical Walls (Information Barriers)			Implementing and managing ethical walls. It includes advising on set up procedures, providing consent wording, managing access requests, and removal of information barriers. Also includes advising on when consent is needed, assisting with drafting consent letters, and advising on use of information barriers.
	RM35	Professional Liability and Ethics			Management of professional liability insurance, ethics investigations and other risk management activities. Includes the support of the organization in professional liability investigations, representation of the firm in legal matters, providing advice on matters internal to the firm (anti-bribery, corruption, etc.), the coordination of outside interests (approving, maintaining register, etc.), review and approval of engagement letter terms and conditions, and the coordination of practicing certificate and recognized body renewals.
	RM40	Practitioner Compliance Monitoring			Ensuring that all practitioners are properly licensed to practice and meet required continuing education (CLE, CPE, etc.) requirements for their practice. It includes associated internal and external reporting requirements and adherence to engagement requirements such as security clearances, etc.
	RM45	Regulatory and Compliance Monitoring			Ensuring that regulations and sanctions imposed by a government agency are being met. Includes monitoring varying transaction types (cards, wire, ACH, etc.) for potential fraud, abuse or risk payments and meeting both internal and external reporting requirements.
KM	Knowledge Management				Organizing, managing and mobilizing the knowledge and expertise of an organization. KM also includes the processes, technology and culture within an organization that facilitates and supports successful knowledge management.
	KM10	Assess and Evaluate			Identifying and evaluating the existing state of knowledge and expertise in the organization, and the supporting processes, technology and culture.
	KM10.10	Identify and Evaluate Explicit Knowledge			Identifying sources of formalized (explicit) knowledge accessible electronically from internal and external databases, systems, information platforms, e-mail newsletters etc., and evaluating the relevance, quality, and usefulness of this knowledge.
	KM10.15	Identify and Evaluate Tacit Knowledge and Expertise			Identifying sources of unformalized (tacit) knowledge skills and expertise accessible internally and externally, and evaluating relevance/quality/usefulness of the knowledge, skills and expertise.
	KM10.20	Identify and Evaluate Processes Enabling Knowledge and Expertise to Flow			Identifying processes that exist to enable internal and external knowledge and expertise to be developed and leveraged effectively (collect, collate, retrieve, reuse, transform from unformalized to formalized, share, and transfer), evaluating the organization’s ability to collaborate effectively to maximize value from the knowledge, skills and expertise available, and evaluating efficiency/quality of these processes.
	KM10.25	Identify and Evaluate Technology Supporting Processes			Identifying systems and the underlying technology used to enable internal and external knowledge and expertise to be developed and leveraged effectively, and the links and interfaces between them, and evaluating the efficiency, usability, and sustainability of these systems.
	KM10.30	Identify and Evaluate Culture			Identifying the cultural environment of the organization relevant to fostering the development and mobilization of knowledge and expertise and evaluating its impact.
	KM10.35	Benchmark Internally and Externally			Mapping the evaluation results from other processes within this category against the business objectives of the organization and benchmarking against peers and competitors.

A_Code	Classification		Description/Definition
	S_Code	Substantive Area	
	C_Code	Category	
	P_Code	Process	
	KM15	<i>Strategy and Planning</i>	Defining and developing a strategy and plan to improve the current state of knowledge management based on the assessment and evaluation performed previously.
	KM15.10	Formulate Vision	Developing the vision for the future state of knowledge management in the organization.
	KM15.15	Perform Gap Analysis	Identifying sources of knowledge and expertise, as well as processes, systems and cultural aspects that are needed to realize the vision but are currently lacking in the organization.
	KM15.20	Develop Knowledge and Expertise Strategy	Defining and documenting strategy to increase or improve the current knowledge and expertise available in the organization, aligned with the vision defined previously.
	KM15.25	Develop Process Strategy	Defining and documenting process strategy to enable knowledge and expertise to be accessed, retrieved, shared and leveraged, aligned with the vision defined previously.
	KM15.30	Develop Technology Strategy	Defining and documenting technology strategy to put new systems in place, enhance and simplify existing systems and landscape, optimize interfaces and connections between systems and ease of use, aligned with the vision defined previously.
	KM15.35	Develop Culture Strategy	Defining and documenting strategy to remove cultural barriers, tackle knowledge hiding, incentivize knowledge sharing, aligned with the vision defined previously.
	KM15.40	Develop Change Management Strategy	Defining and documenting change management strategy to implement systems, processes, cultural change.
	KM20	<i>Implementation</i>	Planning and executing strategies associated with people, process, technology and culture.
	KM20.10	Implement Knowledge and Expertise Strategy	Implementing the knowledge and expertise strategy defined previously. It includes reviewing and validating strategic plan with stakeholders, developing project plan and documentation, preparing and rolling out communication plan, defining KPIs, and executing against project plan.
	KM20.15	Implement Process Strategy	Implementing the previously defined process strategy. It includes reviewing and validating strategic plan with stakeholders, developing project plan and documentation, preparing and rolling out communication plan, defining KPIs, and executing against project plan.
	KM20.20	Implement Technology Strategy	Implementing the technology strategy defined previously. It includes reviewing and validating strategic plan with stakeholders, developing project plan and documentation, preparing and rolling out communication plan, defining KPIs, and executing against project plan.
	KM20.25	Implement Culture Strategy	Implementing the culture strategy defined previously. It includes reviewing and validating strategic plan with stakeholders, developing project plan and documentation, preparing and rolling out communication plan, defining KPIs, and executing against project plan.
	KM20.30	Implement Change Management Strategy	Implementing the change management strategy defined previously. It includes reviewing and validating strategic plan with stakeholders, developing project plan and documentation, preparing and rolling out communication plan, defining KPIs, and executing against project plan.
	KM25	<i>Measure and Report</i>	Developing metrics and analytics to report on benefits realized from new knowledge, expertise, process, technology and culture strategy.
	KM25.10	Define	Defining what to measure, how to measure it, and how often, with respect to knowledge and expertise, processes, technology and culture.
	KM25.15	Measure	Carrying out the measurements defined previously.
	KM25.20	Report	Reviewing results and reporting on measurements performed previously.
	KM30	<i>Maintain and Update</i>	Maintaining enhanced levels of expertise, knowledge, processes, technology and culture, and validating against the vision defined previously.
	KM30.10	Maintain/Retain/Update Knowledge	Reviewing and maintaining knowledge, renewing and refreshing knowledge, and retaining knowledge within the organization to ensure continued alignment with the vision.
	KM30.15	Maintain/Retain/Update Expertise	Reviewing and maintaining existing expertise, renewing and refreshing expertise, and retaining expertise within the organization, to ensure continued alignment with the vision.
	KM30.20	Maintain/Update Process Efficiency	Reviewing and maintaining processes supporting KM to ensure continued alignment with the vision.

A_Code	Classification				Description/Definition
S_Code	Substantive Area				
C_Code	Category	P_Code	Process		
		KM30.25	Maintain/Support/Update Technology	Reviewing and maintaining systems and technical infrastructure supporting KM to ensure continued alignment with the vision.	
		KM30.30	Maintain Culture	Supporting and sustaining a culture of knowledge sharing to ensure continued alignment with the vision.	
BI	Business Intelligence (BI)			Applying a set of techniques and tools for the transformation of raw data into meaningful and useful information for business analysis purposes. BI technologies are capable of handling large amounts of unstructured data to help identify, develop and otherwise create new strategic business opportunities.	
	BI10	Multidimensional Aggregation and Allocation		The processing of data from many different data sources in a resource (computer memory) efficient way.	
	BI15	Denormalization, Tagging and Standardization		The application of various methods of data enhancement and manipulation to facilitate queries and improve search and analytical performance.	
	BI20	Real-time Reporting and Alerts		Delivering business intelligence (BI) or information about business operations as they occur (also known as real-time business intelligence (RTBI)).	
	BI25	Unstructured Data Sources		The interfacing with data that cannot be stored in predictably ordered columns and rows; irregularly or randomly repeated column patterns that vary from row to row; or the knowledge that business users have about future business trends.	
	BI30	Group Consolidation, Budgeting and Forecasts		The consolidation and centralization of financial information, documenting how the overall plan will be executed month to month, specifying expenditures, and using accumulated historical data to predict financial outcomes for future months or years.	
	BI35	Statistical Inference		Deducing properties of an underlying distribution of data.	
	BI40	Probabilistic Simulation		Explicitly representing uncertainties by specifying inputs as probability distributions to quantitatively represent uncertainties in simulations.	
	BI45	Key Performance Indicators		A type of measurement known as a performance indicator or key performance indicator (KPI).	
	BI50	Version Control		Managing changes to documents, computer programs, web sites, and other collections of information (also known as revision control or source control).	
	BI55	Process Management		The application of knowledge, skills, tools, techniques and systems to define, visualize, measure, control, report and improve processes with the goal to meet customer requirements profitably.	
	BI60	Open Item Management		Monitoring and analyzing transactions to prompt predetermined actions at a specific time or if predetermined criteria exist.	
PG	Project Management			The application of specific project management methodologies - planning, organizing, motivating, and controlling resources to achieve specific goals and meet objectives of tactical projects.	
	PG10	Initiation		Determining the nature and scope of the project. Includes understanding the business environment and ensuring necessary controls are incorporated.	
	PG15	Planning and Design		Planning time, cost and resources adequately to estimate the work needed and effectively managing risk during project execution. Includes developing the scope statement, selecting teams, identifying deliverables and activities, estimating resource requirements, time and cost for activities, developing the schedule and budget, risk planning, and gaining formal approval to begin work.	
	PG20	Execution		Completing work defined in the project plan. Involves coordinating people and resources, performing the processes within the project plan, and producing deliverables. Also includes directing and managing project execution, assuring quality of deliverables, managing project team, distributing information, managing stakeholder expectations, conducting procurement, and testing deliverables against the initial design.	
	PG25	Monitoring and Control		Observing project execution, identifying potential problems, taking corrective action, and controlling the execution of the project. Also includes measuring the ongoing project activities, monitoring the project variables (cost, effort, scope, etc.), and identifying corrective actions to address issues and risks.	
	PG30	Closing		The formal acceptance of the project and its conclusion. Administrative activities include the archiving of the files and documenting lessons learned. Includes completing, settling, and closing each contract (including the resolution of any open items) applicable to the project, and finalizing all activities across all of the process groups to formally close the project.	

3724865 1 - WAS Codes - Operations Support Rel 1 4 Page 14 of 16 11/15/2016 11:40 PM

A_Code	Classification				Description/Definition
	S_Code	Substantive Area	C_Code	Category	
				P_Code Process	
		CR25		Notary Services	Notarizing instruments such as transfers and agreements for the sale of real estate, documented gifts, insurance policies, mortgages and deeds, and certificates of service.
		CR30		Property Services	Property services including searching deeds, titles, mortgages, and surveys documents, obtaining encumbrances and copies of documents, and searching for property owned by a particular person.
CM		Communication Services			The coordination and management of electronic and telecommunication systems.
	CM10	Electronic Communications Services			The coordination or management of email, calendars, contact information, tasks, or similar communications activities utilizing systems such as Outlook or manual systems.
	CM15	Telecommunications Services			The coordination or management of phone calls, voice mail messages or conference calls.
	CM20	Facsimile Services			The coordination or management of facsimile (fax) services.
MC		Meetings Coordination			The planning, management and support of meetings.
	MC10	Meeting Logistics			Selecting venues, identifying attendees, inviting/scheduling attendees, meeting RSVP tracking, budget determination, menu planning and caterer selection, decoration, booking/procurement and expense management, identification of support services needed and equipment required.
	MC15	Meeting Setup			Coordinating of setup and take-down of equipment, room arrangement, rental scheduling (delivery and pickup) and installation of decoration. Also includes the handling of meal/refreshment service items and food/beverage service.
	MC20	Meeting Support			Meeting support. Includes reception duties, meeting room management, personnel activities (technology support, hospitality, janitorial and/or greeter personnel), supplies management, and attendee request management (last minute requests for special items such as whiteboards, flipcharts, laser pointers, microphones, printouts, etc. not identified in Meeting Logistics or coordinated during Meeting Setup).
TR		Travel Management			The planning, management and support of travel activities.
	TR10	Travel Planning			The coordination of travel arrangements such as hotel, airline, vehicle rental, airport ground transportation, car services, bus chartering, etc.
	TR15	Rewards Program Management			The establishment and maintenance of group travel reward programs (including business credit card reward points programs, corporate reward programs for hotels, airlines and vehicle rental companies, and coordination of benefits to redeem corporate rewards for administrative or other non-reimbursable travel).
	TR20	Preferred Travel Vendor Management			The management of memberships in travel-related organizations (corporate housing vendors, extended-stay facilities, expatriate housing services, corporate time-share vendors, charter flight services, etc.). Management of the negotiation of rates at area hotels. Relationship management with outsourced travel agencies, travel services, and corporate travel brokers.
	TR25	Group Travel Management			The procurement of hotel room blocks, group airfare rates, rental vehicle pricing or other travel-related expenses.
	TR30	Travel Readiness Management			The coordination of travel-related pre-check programs (e.g. TSA PreCheck, Global Entry), management of passport and visa related services, management of travel-related insurance programs, oversight of interoffice travel information (e.g. temporary amenities, lodging, directions, office access, parking), and management of information related to foreign travel (e.g. immunization, identification requirements, customs, culture, currency, language, and translation services).
FM		Facilities Management			Processes that encompass multiple disciplines intended to ensure functionality of the built environment by integrating people, place, process and technology.
	FM10	Operations and Maintenance			Assessing the condition of the facility and managing facility operations and maintenance activities. It includes occupant services (parking, janitorial services, food services, concierge, facility helpdesk, security and safety), maintenance contracts, and operational planning requirements (temperature control, lighting, equipment replacement, etc.).
		FM10.10	Assess		Managing the assessment of building systems, structure, interiors, exteriors, and grounds condition.
		FM10.15	Operations		Managing the acquisition, installation, operation, maintenance and disposal of building systems, and structural, interior, exterior and grounds elements. It includes maintaining relations with landlord/property manager regarding maintenance and related occupancy issues.

A_Code	Classification				Description/Definition
	S_Code	Substantive Area			
		C_Code	Category	Process	
			FM10.20	Occupant Services	Managing occupant services (parking, janitorial services, food services, concierge, facility helpdesk, security and safety).
			FM10.25	Safety and Security	Assuring enterprise and employee safety and security. Includes processes to prevent and/or mitigate loss, risk to or from personnel, threats to its physical assets, damage to its technology and intellectual property, and risks arising from all elements surrounding the work environment.
			FM10.30	Maintenance	Managing the maintenance contracting process.
			FM10.35	Operational Planning	Developing, recommending and managing the facility’s operational planning requirements (temperature control, lighting, equipment replacement, etc.).
		FM15	Lease Administration		Acquiring, allocating, approving and managing lease space based on identified needs and in compliance with established guidelines to ensure efficient use of lease space.
			FM15.10	Research and Analysis	Detailed market and feasibility studies, key property trends research, demand and supply analyses, alternatives based on project viability, and other issues such as insurance claims, tenant analysis, market analysis, competition, etc.
			FM15.15	Negotiations	Lease renewals and new leasing contracts including due diligence (physical, legal, financial) of potential properties.
			FM15.20	Lease/Portfolio Management	Property portfolio analysis, structure, category and distribution analysis, data management and comprehensive lease audits, lease expiry profiles and renewals negotiations, advise on premises consolidation, procurement of premises, lease negotiations, etc., and management of property disposal process.
		FM20	Real Estate and Property Management		On-going communication, comprehensive marketing and advertising, thorough tenant screening and selection, full-service leasing, timely rent collection, regular inspections, cost-effective and reliable maintenance, strict and compliant evictions, and comprehensive accounting.
		FM25	Emergency Preparedness		Preparing for and responding to an unplanned event that can cause deaths or significant injuries to employees, customers or the public, or that can shut down your business, disrupt operations, cause physical or environmental damage, or threaten the facility’s financial standing or public image.
			FM25.10	Program Management	Organizing, developing and administering preparedness program and identifying regulations that establish minimum requirements.
			FM25.15	Planning	Gathering information about hazards and assess risks, conducting a business impact analysis (BIA), and examining ways to prevent hazards and reduce risks.
			FM25.20	Implementation	Writing a preparedness plan addressing resource management, emergency response, crisis communications, business continuity, information technology, employee assistance, incident management, and training.
			FM25.25	Testing	Testing and evaluating a plan. Includes defining different types of exercises, learning how to conduct exercises, and using exercise results to evaluate the effectiveness of the plan.
			FM25.30	Improvement	Identifying when the preparedness program needs to be reviewed. It includes discovering methods to evaluate the preparedness program and utilizing the review to make necessary changes and plan improvements.
		FM30	Environmental Stewardship and Sustainability		An environmentally sustainable organization seeking to participate within its community and seeking to balance economy, society and environment within its operations.
		MM	Mail and Messenger Services		The handling of mail or deliveries. It includes the review of incoming mail, processing of incoming and outgoing mail, shipping, and internal and external deliveries (excludes court runs).
			MM10	Delivery Services	Internal or external delivery or messenger runs (excluding court runs).
			MM15	Mail Processing and Review	Sorting, scanning, organizing or otherwise processing incoming and outgoing mail, packages or other shipments. It includes reviewing incoming mail, annotating with comments, associating with appropriate file, or other forms of pre-work or organization.