RETAIL PCF OVERVIEW

Based on the renowned Process Classification Framework® (PCF), The Retail PCF® is customized to define processes used within organizations around the world. Version 6.1.0 of the The Retail PCF® includes changes to make it compliant with the most recent information in Cross Industry PCF® v6.1.0. This version of the PCF® was developed in conjunction with Microsoft and contains feedback from a variety of individuals within the industry. Microsoft provided much of the subject matter expertise to create this industry specific process classification framework.

THE FRAMEWORK FOR PROCESS IMPROVEMENT

Experience shows that the potential of benchmarking to drive dramatic improvement lies squarely in making out-of-the-box comparisons and searching for insights not typically found within intra-industry paradigms. To enable this beneficial benchmarking, the APQC Process Classification Framework® (PCF) serves as a high-level, industry-neutral enterprise process model that allows organizations to see their business processes from a cross-industry viewpoint. The cross-industry framework has experienced more than 20 years of creative use by thousands of organizations worldwide. The PCF provides the foundation for APQC's Open Standards Benchmarking® (OSB) database and the work of its advisory council of global industry leaders. Each version of the PCF will continue to be enhanced as the OSB database further develops definitions, processes, and measures. The PCF and associated measures and benchmarking surveys are available for download from the Open Standards Benchmarking web site at www.apqc.org/osb.

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 a 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 2014, APQC worked to enhance the cross-industry PCF and updated a number of industry-specific process classification frameworks.

The PCF is written in United States English language format.
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 non profit serving organizations around the world in all sectors of business, education, and government. APQC is also a proud winner of the 2003, 2004, 2008, 2012, and 2013 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.

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THE APQC PROCESS CLASSIFICATION FRAMEWORK® (PCF)
The PCF was developed by non-profit APQC, a global resource for benchmarking and best practices, and its member companies as an open standard to facilitate improvement through process management and benchmarking, regardless of industry, size, or geography. The PCF organizes operating and management processes into 12 enterprise level categories, including process groups and over 1,000 processes and associated activities. To download the full PCF or industry-specific versions of the PCF as well as associated measures and benchmarking, visit www.apqc.org/pcf.
PCF LEVELS EXPLAINED

PROCESS ELEMENT NUMBERING SCHEME

The PCF identifies each process element using a unique 5-digit reference number following the name of the process element, i.e., (16437), (17060), (17061) (16458), (18129), shown in the above graphic. This number will always refer to the conceptual definition of the process element. The actual process elements and actual definition may change, but conceptually the decomposition will remain consistent considering the entire scope of the PCF. A new 5-digit number will be assigned to a process element if its definition substantially changes.
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4.1.6.1.6 Seek opportunities to improve efficiency and value (10286)
4.1.6.1.7 Collaborate with suppliers to identify sourcing opportunities (10287)
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4.1.6.4.1 Select suppliers (10288)
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4.3.6.2 Create item attributes (16677)
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5.1.1.1.1 Establish distribution center layout constraints (10267)
5.1.1.1.2 Establish inventory management constraints (10268)
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5.1.1.3 Plan inbound material receipts (10349)
5.1.1.4 Plan outbound product flow (16682)
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5.1.2.2 Track quantity and location of items (16685)
5.1.2.3 Determine lot numbering system (10376)
5.1.2.4 Determine lot usage (10377)
5.1.2.5 Track and manage lots and serial numbered items (16686)
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5.1.2.7 Receive, inspect, and store inbound deliveries (10354)
5.1.2.8 Track product availability (10355)
5.1.2.9 Track inventory (10357)
5.1.2.10 Track third-party logistics storage and shipping performance (10358)
5.1.2.11 Manage physical finished goods inventory (10359)
5.1.2.12 Prepare items/products for sale (16687)
5.1.2.13 Repackage items into SKUs (16688)
5.1.3 Manage loading docks and yard (16689)
5.1.3.1 Analyze and forecast yard/dock traffic (16690)
5.1.3.2 Execute yard and dock schedules (16691)
5.1.3.3 Adjust schedules (16692)
5.1.4 Pick, pack, and ship (10356)
5.1.4.1 Analyze product velocities (16693)
5.1.4.2 Develop pick plan/patterns (16694)
5.1.4.3 Generate pick lists and pick (16695)
5.1.4.4 Pack orders and apply shipping labels (16696)
5.1.4.5 Load trucks (16697)
5.1.5 Plan and manage workforce (16698)
5.1.5.1 Estimate workload (16699)
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5.2.1.4 Develop overall distribution plan (16710)
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  5.2.4.2 Establish policies and procedures (16720)
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  5.2.5.1 Plan, transport, and deliver outbound product (10360)
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  5.2.5.4 Plan carriers and routes (16724)
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5.2.6 Track carrier performance (10361)

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    5.3.1.3 Execute replenishment orders from warehouse (16730)
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    5.3.2.2 Monitor and adjust inventory levels (16733)
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    5.3.2.4 Manage ship from store and store pickup inventory levels (16735)
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  5.3.3 Replenish fulfillment centers (16737)
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    5.3.3.2 Generate purchase orders (16739)
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5.4 Manage direct-to-store-delivery (16745)

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  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)
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    6.1.2.1 Gather skill requirements according to corporate strategy and market environment (10423)
    6.1.2.2 Plan employee resourcing requirements per unit/organization (10424)
    6.1.2.3 Develop compensation plan (10425)
    6.1.2.4 Develop succession plan (10426)
    6.1.2.5 Develop employee diversity plan (10427)
    6.1.2.6 Develop other HR programs (10428)
    6.1.2.7 Develop HR policies (10429)
    6.1.2.8 Administer HR policies (10430)
    6.1.2.9 Plan employee benefits (10431)
    6.1.2.10 Develop strategy for HR systems/technologies/tools (10432)
    6.1.2.11 Develop work force strategy models (10433)
  6.1.3 Monitor and update plans (10417)
    6.1.3.1 Measure realization of objectives (10434)
    6.1.3.2 Measure contribution to business strategy (10435)
    6.1.3.3 Communicate plans and provide updates to stakeholders (10436)
    6.1.3.4 Review and revise HR plans (10438)
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    6.2.1.1 Align staffing plan to work force plan and business unit strategies/need resources (10445)
    6.2.1.2 Develop and open job requisitions (10446)
    6.2.1.3 Develop job descriptions (10447)
    6.2.1.4 Post requisitions (10448)
    6.2.1.5 Manage internal/external job posting Web sites (10449)
    6.2.1.6 Modify requisitions (10450)
    6.2.1.7 Notify hiring manager (10451)
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    6.2.2.2 Perform recruiting activities/events (10454)
    6.2.2.3 Manage recruiting vendors (10455)
    6.2.2.4 Manage employee referral programs (17047)
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   6.2.3.4 Select and reject candidates (10459)
   6.2.3.5 Obtain candidate background information (10460)
   6.2.3.6 Conduct pre-employment screening (10461)
   6.2.3.7 Recommend/Not recommend candidate (10462)

6.2.4 Manage new hire/re-hire (10443)
   6.2.4.1 Draw up and make offer (10463)
   6.2.4.2 Negotiate offer (10464)
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6.2.5 Manage applicant information (10444)
   6.2.5.1 Create applicant record (10466)
   6.2.5.2 Manage/Track applicant data (10467)
   6.2.5.3 Archive and retain records of non-hires (10468)

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   6.3.1 Manage employee orientation and deployment (10469)
      6.3.1.1 Create/Maintain employee on-boarding program (10474)
      6.3.1.2 Evaluate the effectiveness of employee on-boarding program (11243)
      6.3.1.3 Execute on-boarding program (17050)
   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)
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   6.3.3 Manage employee relations (17052)
      6.3.3.1 Manage health and safety (10482)
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      6.3.4.1 Define employee development guidelines (10487)
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      6.3.5.1 Align employee and organization development needs (10490)
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      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 (17053)
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      6.4.1.2 Develop benefits and reward plan (10499)
      6.4.1.3 Perform competitive analysis of benefit and rewards (10500)
      6.4.1.4 Identify compensation requirements based on financial, benefits, and HR policies (10501)
      6.4.1.5 Administer compensation and rewards to employees (10502)
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   6.4.2 Manage and administer benefits (10495)
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   6.5.1 Manage promotion and demotion process (10512)
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   6.5.7 Relocate employees and manage assignments (17055)
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6.6 Manage employee information and analytics (17056)
   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 systems (10527)
   6.6.7 Manage employee communication (10528)
      6.6.7.1 Manage/Collect employee suggestions and perform employee research (10530)
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6.7 Manage employee communication (17057)
   6.7.1 Develop employee communication plan (10529)
   6.7.2 Deliver employee communications (10532)
## 7. Manage Information Technology (10008)

### 7.1 Manage the business of information technology (IT) (10563)

<table>
<thead>
<tr>
<th>Task</th>
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</thead>
<tbody>
<tr>
<td>Develop the enterprise IT strategy (10570)</td>
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</tr>
<tr>
<td>Build strategic intelligence (10603)</td>
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</tr>
<tr>
<td>Identify long-term IT needs of the enterprise in collaboration with stakeholders (10604)</td>
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<tr>
<td>Define strategic standards, guidelines, and principles (10605)</td>
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<tr>
<td>Define and establish IT architecture and development standards (10606)</td>
<td></td>
</tr>
<tr>
<td>Define strategic vendors for IT components (10607)</td>
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</tr>
<tr>
<td>Establish IT governance organization and processes (10608)</td>
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<tr>
<td>Build strategic plan to support business objectives (10609)</td>
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</table>

### 7.2 Define the enterprise architecture (10571)

<table>
<thead>
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<th>Task</th>
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<tbody>
<tr>
<td>Establish the enterprise architecture definition (10611)</td>
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<tr>
<td>Confirm enterprise architecture maintenance approach (10612)</td>
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<tr>
<td>Maintain the relevance of the enterprise architecture (10613)</td>
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<tr>
<td>Act as clearinghouse for IT research and innovation (10614)</td>
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<tr>
<td>Govern the enterprise architecture (10615)</td>
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### 7.3 Manage the IT portfolio (10572)

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<tbody>
<tr>
<td>Establish the IT portfolio (10616)</td>
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<tr>
<td>Analyze and evaluate the value of the IT portfolio for the enterprise (10617)</td>
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<tr>
<td>Provision resources in accordance with strategic priorities (10618)</td>
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### 7.4 Perform IT research and innovation (10573)

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<tr>
<th>Task</th>
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<tbody>
<tr>
<td>Research technologies to innovate IT services and solutions (10620)</td>
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<tr>
<td>Transition viable technologies for IT services and solutions development (10621)</td>
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### 7.5 Evaluate and communicate IT business value and performance (10575)

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<tbody>
<tr>
<td>Establish and monitor key performance indicators (10625)</td>
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<tr>
<td>Evaluate IT plan performance (10626)</td>
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</tr>
<tr>
<td>Communicate IT value (10627)</td>
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</table>

### 7.2 Develop and manage IT customer relationships (10564)

<table>
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<tr>
<th>Task</th>
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<tbody>
<tr>
<td>Develop IT services and solutions strategy (10578)</td>
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<tr>
<td>Research IT services and solutions to address business and user requirements (11244)</td>
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</tr>
<tr>
<td>Translate business and user requirements into IT services and solutions requirements (11245)</td>
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<tr>
<td>Formulate IT services and solutions strategic initiatives (11246)</td>
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</tr>
<tr>
<td>Coordinate strategies with internal stakeholders to ensure alignment (11247)</td>
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<tr>
<td>Evaluate and select IT services and solutions strategic initiatives (11248)</td>
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### 7.2.2 Develop and manage IT service levels (10579)

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<tbody>
<tr>
<td>Create and maintain the IT services and solutions catalog (10640)</td>
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<tr>
<td>Establish and maintain business and IT service-level agreements (10641)</td>
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<tr>
<td>Evaluate and report service-level attainment results (10642)</td>
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<tr>
<td>Communicate business and IT service-level improvement opportunities (10643)</td>
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</table>

### 7.2.3 Perform demand-side management (DSM) for IT services (10580)

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<td>Analyze IT services and solutions consumption and usage (10644)</td>
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<tr>
<td>Develop and implement incentive programs that improve consumption efficiency (10645)</td>
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<tr>
<td>Develop volume/unit forecast for IT services and solutions (10646)</td>
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</table>

### 7.2.4 Manage IT customer satisfaction (10581)

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<tr>
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<td>Capture and analyze customer satisfaction (10647)</td>
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<tr>
<td>Assess and communicate customer satisfaction patterns (10648)</td>
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<tr>
<td>Initiate improvements based on customer satisfaction patterns (10649)</td>
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### 7.2.5 Market IT services and solutions (10582)

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<tr>
<th>Task</th>
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<tbody>
<tr>
<td>Develop IT services and solutions marketing strategy (10650)</td>
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<tr>
<td>Develop and manage IT customer strategy (10651)</td>
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<tr>
<td>Manage IT services and solutions advertising and promotional campaigns (10652)</td>
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<tr>
<td>Process and track IT services and solutions orders (10653)</td>
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</table>

### 7.3 Develop and implement security, privacy, and data protection controls (11220)

<table>
<thead>
<tr>
<th>Task</th>
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<tbody>
<tr>
<td>Establish information security, privacy, and data protection strategies and levels (11230)</td>
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<tr>
<td>Test, evaluate, and implement information security and privacy and data protection controls (11231)</td>
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### 7.4 Manage enterprise information (10565)

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Develop information and content management strategies (10583)</td>
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</tr>
<tr>
<td>Understand information and content management needs and the role of IT services for executing the business strategy (10654)</td>
<td></td>
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<tr>
<td>Assess the information and content</td>
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</table>
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7.4.1 Identify and prioritize information and content management actions (10656)

7.4.1.1 Identify and prioritize information and content management actions (10656)

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7.4.1.3 Identify and prioritize information and content management actions (10656)

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7.4.2.1 Define the enterprise information architecture (10584)

7.4.2.2 Define the enterprise information architecture (10584)

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7.4.3.1 Manage information resources (10585)

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7.4.3.4 Manage information resources (10585)

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7.4.4.1 Perform enterprise data and content management (10586)

7.4.4.2 Perform enterprise data and content management (10586)

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7.4.4.4 Perform enterprise data and content management (10586)

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7.5.1.1 Develop the IT development strategy (10587)

7.5.1.2 Develop the IT development strategy (10587)

7.5.1.3 Develop the IT development strategy (10587)

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7.5.2.1 Perform IT services and solutions life cycle planning (10588)

7.5.2.2 Perform IT services and solutions life cycle planning (10588)

7.5.2.3 Perform IT services and solutions life cycle planning (10588)

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7.5.3.1 Develop and maintain IT services and solutions architecture (10589)

7.5.3.2 Develop and maintain IT services and solutions architecture (10589)

7.5.3.3 Develop and maintain IT services and solutions architecture (10589)

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7.5.4.1 Create IT services and solutions (10590)

7.5.4.2 Create IT services and solutions (10590)

7.5.4.3 Create IT services and solutions (10590)

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7.6.1.1 Develop the IT deployment strategy (10592)

7.6.1.2 Develop the IT deployment strategy (10592)

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7.6.2.1 Plan and implement changes (10593)

7.6.2.2 Plan and implement changes (10593)

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