CONSUMER ELECTRONICS PCF

OVERVIEW

Based on the renowned Process Classification Framework® (PCF), The Consumer Electronics PCF® is customized to define processes used within organizations around the world. Version 6.1.0 of the The Consumer Electronics 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 Wipro and contains feedback from a variety of individuals within the industry. Wipro 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.
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.

**PCF LEVELS EXPLAINED**

**Level 1 - Category**

| 10.0 Manage Enterprise Risk, Compliance, Remediation and Resiliency (16437) |
| Represent the highest level of process in the enterprise, such as Manage customer service, Supply chain, Financial organization, and Human resources. |

**Level 2 - Process Group**

| 10.1 Manage Enterprise Risk (17060) |
| Indicates the next level of processes and represents a group of processes. Perform after sales repairs, Procurement, Accounts payable, Recruit/source, and Develop sales strategy are examples of process groups. |

**Level 3 - Process**

| 10.1.4 Manage Business Unit and Function Risk (17061) |
| A process is the next level of decomposition after a process group. The process may include elements related to variants and rework in addition to the core elements needed to accomplish the process. |

**Level 4 - Activity**

| 10.1.4.3 Develop Mitigation Plans for Risks (16458) |
| Indicates key events performed when executing a process. Examples of activities include Receive customer requests, Resolve customer complaints, and Negotiate purchasing contracts. |

**Level 5 - Task**

| 10.1.4.3.1 Assess Adequacy of Insurance Cover (18129) |
| Tasks represent the next level of hierarchical decomposition after activities. Tasks are generally much more fine grained and may vary widely across industries. Examples include: Create business case and obtain funding and Design recognition and reward approaches. |
1.0 Develop Vision and Strategy (10002)

1.1 Define the business concept and long-term vision (17040)

1.1.1 Assess the external environment (10017)
  1.1.1.1 Analyze and evaluate competition (10021)
  1.1.1.2 Identify economic trends (10022)
  1.1.1.3 Identify political and regulatory issues (10023)
  1.1.1.4 Assess new technology innovations (10024)
  1.1.1.5 Analyze demographics (10025)
  1.1.1.6 Identify social and cultural changes (10026)
  1.1.1.7 Identify ecological concerns (10027)
  1.1.1.8 Monitor intellectual property concerns (16790)
  1.1.1.9 Evaluate IP acquisition options - external IP licensing (16791)

1.1.2 Survey market and determine customer needs and wants (10018)
  1.1.2.1 Conduct qualitative/quantitative assessments (10028)
  1.1.2.2 Capture and assess customer needs (10029)

1.1.3 Perform internal analysis (10019)
  1.1.3.1 Analyze organizational characteristics (10030)
  1.1.3.2 Create baselines for current processes (10031)
  1.1.3.3 Analyze systems and technology (10032)
  1.1.3.4 Analyze financial positions (10033)
  1.1.3.5 Identify enterprise core competencies (10034)

1.1.4 Establish strategic vision (10020)
  1.1.4.1 Align stakeholders around strategic vision (10035)
  1.1.4.2 Communicate strategic vision to stakeholders (10036)

1.1.5 Conduct organization restructuring opportunities (16792)
  1.1.5.1 Identify restructuring opportunities (16793)
  1.1.5.2 Perform due-diligence (16794)
  1.1.5.3 Analyze deal options (16795)
    1.1.5.3.1 Evaluate acquisition options (16796)
    1.1.5.3.2 Evaluate merger options (16797)
    1.1.5.3.3 Evaluate de-merger options (16798)
    1.1.5.3.4 Evaluate divesture options (16799)

1.1.6 Monitor and determine internal and external needs (10019)
  1.1.6.1 Develop new organizational structure (16791)
  1.1.6.2 Develop organizational strategy (16792)

1.2 Develop business strategy (10015)

1.2.1 Develop overall mission statement (10037)
  1.2.1.1 Define current business (10044)
  1.2.1.2 Formulate mission (10045)
  1.2.1.3 Communicate mission (10046)
  1.2.2 Evaluate strategic options to achieve the objectives (10038)
    1.2.2.1 Define strategic options (10047)
    1.2.2.2 Assess and analyze impact of each option (10048)

1.2.3 Develop and select business strategies (10039)
  1.2.3.1 Develop B2B strategy (16800)
    1.2.3.1.1 Develop service as a product strategy (16801)
  1.2.3.2 Develop B2C strategy (16802)
  1.2.3.3 Develop partner alliance strategy (16803)
  1.2.3.4 Develop crowd sourcing strategy (16804)
  1.2.3.5 Develop merger/demerger/acquisition/exit strategy (16805)
  1.2.3.6 Develop innovation strategy (16806)
  1.2.3.7 Develop sustainability strategy (14189)
  1.2.3.8 Develop global support and shared services strategy (14190)
  1.2.3.9 Develop lean/continuous improvement strategy (14197)

1.2.4 Coordinate and align functional and process strategies (10040)
  1.2.5 Create organizational design (structure, governance, reporting, etc.) (10041)
    1.2.5.1 Evaluate breadth and depth of organizational structure (10049)
    1.2.5.2 Perform job-specific roles mapping and value-added analyses (10050)
    1.2.5.3 Develop role activity diagrams to assess hand-off activity (10051)
    1.2.5.4 Perform organization redesign workshops (10052)
    1.2.5.5 Design the relationships between organizational units (10053)
    1.2.5.6 Develop role analysis and activity diagrams for key processes (10054)
    1.2.5.7 Assess organizational implication of feasible alternatives (10055)
    1.2.5.8 Migrate to new organization (10056)

1.2.6 Develop and set organizational goals (10042)
  1.2.7 Formulate business unit strategies (10043)

1.3 Manage strategic initiatives (10016)

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  1.3.3 Select strategic initiatives (10059)
  1.3.4 Establish high-level measures (10060)
2.0 Design, Manage, and Develop Products, and Services (11680)

2.1 Design products and services (11681)

2.1.1 Analyze market segments, portfolios and technologies (11321)
  2.1.1.1 Identify market segments (11322)
  2.1.1.2 Develop and manage product range architecture (11326)
  2.1.1.3 Identify brand and portfolio gaps (11327)

2.1.2 Define product/service development requirements (10064)
  2.1.2.1 Identify potential improvements to existing products and services (10068)
    2.1.2.1.1 Derive requirements from social media and tools (16807)
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    2.1.2.3.3 Derive security requirements for products & services (16810)
    2.1.2.3.4 Derive regulatory compliance requirements (16811)
    2.1.2.3.5 Derive requirements from industry standards (16812)
    2.1.2.3.6 Develop user experience design specifications (16813)
    2.1.2.3.7 Derive ‘services-as-a-product’ offering (16814)
  2.1.2.4 Define service model (16815)
  2.1.2.5 Identify design/development performance indicators (10091)

2.1.3 Perform discovery research (10065)
  2.1.3.1 Identify new technologies (10070)
  2.1.3.2 Develop new technologies (10071)
  2.1.3.3 Assess feasibility of integrating new leading technologies into product/service concepts (10072)

2.1.4 Evaluate performance of existing products/services against market opportunities (10063)
  2.1.4.1 Evaluate new product/service ideas against existing product, new product development portfolio, and past products (11332)

2.1.5 Confirm alignment of product/service concepts with business strategy (10066)
  2.1.5.1 Plan and develop cost and quality targets (10073)
  2.1.5.2 Prioritize and select new product/service concepts (10074)

2.1.6 Design products and services (18607)

2.1.6.1 Prepare high-level business case and technical assessment (10084)
  2.1.6.2 Develop product/service design specifications (10085)
  2.1.6.3 Develop warranty strategy plan (16817)
  2.1.6.4 Design, and manage product data, design, and bill of materials (16818)
  2.1.6.5 Document design specifications (10086)
  2.1.6.6 Design for manufacturing (16819)
  2.1.6.7 Design for product servicing (16820)
  2.1.6.8 Design for re-manufacturing (16821)
  2.1.6.9 Review product troubleshooting methodology (16822)
  2.1.6.10 Design for product upgrades (16823)

2.2 Manage products and services (18608)

2.2.1 Manage and control design of products and services (16825)

2.2.1.1 Develop plan for new product development and introduction (16824)
  2.2.1.2 Introduce new products/services (10077)
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  2.2.1.4 Identify and refine performance indicators (10079)

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2.3 Develop products and services (18609)

2.3.1 Build products and services (18610)
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  2.3.1.2 Develop product hardware and software (16828)
  2.3.1.3 Develop services (16829)
  2.3.1.4 Build prototypes (10088)
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  2.3.1.7 Analyze design specifications for improvements (16832)
| 2.3.1.8 | Eliminate quality, reliability, scalability, and availability problems (10089) |
| 2.3.1.9 | Prepare gating criteria for product development milestones and targets (16833) |
| 2.3.2 | Evaluate products and services (18611) |
| 2.3.2.1 | Conduct product pre-certification (16834) |
| 2.3.2.2 | Conduct in-house product/service testing and evaluate feasibility (10090) |
| 2.3.2.3 | Validate product conformance to qualify for industry specific product certification (16835) |
| 2.3.2.4 | Validate product conformance to qualify for country specific product certification (16836) |
| 2.3.3 | Test market for new or revised products and services (10081) |
| 2.3.3.1 | Prepare detailed market study (10093) |
| 2.3.3.2 | Conduct customer tests and interviews (10094) |
| 2.3.3.3 | Finalize product/service characteristics and business cases (10095) |
| 2.3.3.4 | Finalize technical requirements (10096) |
| 2.3.3.5 | Identify requirements for changes to manufacturing/delivery processes (10097) |
| 2.3.4 | Prepare for production (10082) |
| 2.3.4.1 | Collaborate on design with suppliers and contract manufacturers (10092) |
| 2.3.4.2 | Establish manufacturing process (16837) |
| 2.3.4.3 | Identify, and develop new tools, fixtures, and equipment (16838) |
| 2.3.4.4 | Establish production part approval process (16839) |
| 2.3.4.5 | Develop and test prototype production and/or service delivery process (10098) |
| 2.3.4.6 | Design and obtain necessary materials and equipment (10099) |
| 2.3.4.7 | Install and validate production process or methodology (10100) |
| 2.3.4.8 | Optimize manufacturing process and resources (16840) |
| 2.3.4.9 | Conduct quality control process (16841) |
| 2.3.4.10 | Build final distribution and production plans (11411) |
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| 2.3.5 | Launch products/services (11408) |
| 2.3.5.1 | Develop packaging (11402) |
| 2.3.5.2 | Order packaging and ingredients (11412) |
| 2.3.5.3 | Design to reduce transit failures and damages (16842) |
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| 2.3.5.5 | Manufacture and release finished product (11414) |
| 2.3.5.6 | Distribute product (11415) |
| 2.3.6 | Support and implement changes to product manufacturing and service delivery process (11416) |
| 2.3.6.1 | Monitor production runs (11417) |
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| 2.3.6.4 | Identify product/service design and configuration changes (11420) |
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| 2.3.7.1 | Review market performance (11424) |
| 2.3.7.2 | Review effectiveness of supply chain and distribution network (11425) |
| 2.3.7.3 | Review quality and performance of the product (11426) |
| 2.3.7.4 | Conduct financial review (11427) |

### 3.0 Market and Sell Products and Services (10004)

#### 3.1 Understand markets, customers, and capabilities (10101)

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

#### 3.2 Develop marketing strategy (10102)

- **3.2.1** Define offering and customer value proposition (11168)
  - **3.2.1.1** Define offering and positioning (11169)
  - **3.2.1.2** Develop value proposition including brand positioning for target segments (11170)
  - **3.2.1.3** Validate value proposition with target segments (11171)
  - **3.2.1.4** Develop new branding (11172)
- **3.2.2** Define pricing strategy to align to value proposition (10123)

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3.2.2.1 Establish guidelines for applying pricing of products/services (10124)

3.2.2.2 Approve pricing strategies/policies (10125)

3.2.3 Develop and manage brands (16844)

3.2.3.1 Develop marketing strategy for new and existing brands (16845)

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3.2.3.3 Access brand performance management (16847)

3.2.4 Develop marketing communication strategy (16848)

3.2.4.1 Develop customer communication calendar (16849)

3.2.4.2 Define public relations (PR) strategy (16850)

3.2.4.3 Define direct marketing strategy (16851)

3.2.4.4 Define internal marketing communication strategy (16852)

3.2.4.5 Identify new media for marketing communication (16853)

3.2.4.6 Define new media communication strategy (16854)

3.2.4.7 Define in-store and point of sale (POS) communication strategy (16855)

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3.2.5.2 Define customer loyalty program (16858)

3.2.5.3 Define customer lifecycle/value based strategy (16859)

3.2.5.4 Define tailored product and services experience (16860)

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3.2.5.6 Define customer retention strategy (16862)

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3.2.5.9 Define marketing channel innovation framework (16865)

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3.2.6.3 Select channels for target segments (10128)

3.2.6.4 Develop engagement plan for new media channel (16866)

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3.3.1.2 Analyze sales trends and patterns (10135)

3.3.1.3 Generate sales forecast (10136)

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3.4.2 Establish marketing budgets (10149)

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3.4.4 Develop and manage pricing (10151)

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3.4.4.2 Execute pricing plan (10164)

3.4.4.3 Evaluate pricing performance (10165)

3.4.4.4 Refine pricing as needed (10166)

3.4.5 Develop and manage promotional activities (10152)

3.4.5.1 Define promotional concepts (10167)

3.4.5.2 Plan and test promotional activities (10168)

3.4.5.3 Execute promotional activities (10169)

3.4.5.4 Evaluate promotional performance metrics (10170)
| 3.4.5.5 | Refine promotional performance metrics (10171) |
| 3.4.5.6 | Incorporate learning into future/planned consumer promotions (10172) |
| 3.4.6 | Manage marketing assets (16869) |
| 3.4.6.1 | Manage digital marketing assets (16870) |
| 3.4.6.2 | Manage physical marketing assets (16871) |
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| 3.4.7 | Track customer management measures (10153) |
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| 3.4.9 | Manage marketing operations (16875) |
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### 3.5 Develop and manage sales plans (10105)

| 3.5.1 | Generate leads (10182) |
| 3.5.1.1 | Produce and manage sales collateral (16878) |
| 3.5.1.2 | Identify potential customers (10188) |
| 3.5.1.3 | Identify leads (10189) |
| 3.5.2 | Manage customers and accounts (10183) |
| 3.5.2.1 | Develop sales/key account plan (11173) |
| 3.5.2.2 | Manage customer relationships (11174) |
| 3.5.2.3 | Manage customer master data (14208) |
| 3.5.3 | Manage customer sales (10184) |
| 3.5.3.1 | Perform sales calls (10190) |
| 3.5.3.2 | Perform pre-sales activities (10191) |
| 3.5.3.3 | Close the sale (10192) |
| 3.5.3.4 | Record outcome of sales process (10193) |

### 3.4.4 Manage sales orders (10186)

| 3.4.4.1 | Accept and validate sales orders (10194) |
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| 3.4.4.3 | Determine availability (10196) |
| 3.4.4.4 | Determine fulfillment process (10197) |
| 3.4.4.5 | Enter orders into system and identify/perform cross-sell/up-sell activity (10198) |
| 3.4.4.6 | Process back orders and updates (10199) |
| 3.4.4.7 | Handle order inquiries including post-order fulfillment transactions (10200) |

### 3.4.5 Manage sales force (10186)

| 3.4.5.1 | Determine sales resource allocation (10209) |
| 3.4.5.2 | Establish sales force incentive plan (10210) |

### 3.4.6 Manage sales partners and alliances (10187)

| 3.4.6.1 | Provide sales and product training to sales partners/alliances (10211) |
| 3.4.6.2 | Develop sales forecast by partner/alliance (10212) |
| 3.4.6.3 | Agree on partner and alliance commissions (10213) |
| 3.4.6.4 | Evaluate partner/alliance results (10214) |
| 3.4.6.5 | Manage channel partner master data (14209) |

### 3.4.7 Co-ordinate with multi brand retail store in operations (16879)

| 3.4.7.1 | Perform inventory management of own brand products (16880) |
| 3.4.7.2 | Review product placement inside store/designated area (16881) |
| 3.4.7.3 | Capture shopper insights from retailer’s loyalty program (16882) |
| 3.4.7.4 | Define merchandising activities (16883) |
| 3.4.7.5 | Collect and analyze retailer’s POS data (16884) |
| 3.4.7.6 | Manage in-store point of purchase displays (16885) |
| 3.4.7.7 | Optimize on-shelf availability (16886) |

### 4.0 Deliver Products and Services (10005)

#### 4.1 Plan for and align supply chain resources (10215)

| 4.1.1 | Develop production and materials strategies (10221) |
| 4.1.1.1 | Define manufacturing goals (10229) |
| 4.1.1.2 | Define labor and materials policies (10230) |
| 4.1.1.3 | Define contract manufacturing strategy/outourcing policies (10231) |
| 4.1.1.4 | Define manufacturing capital expense policies (10232) |
| 4.1.1.5 | Define capacities (10233) |
| 4.1.1.6 | Define production network and supply constraints (10234) |
| 4.1.1.7 | Define production process (14193) |
4.1.1 Define production workplace layout and infrastructure (14194)
4.1.2 Manage demand for products and services (10222)
  4.1.2.1 Develop baseline forecasts (10235)
  4.1.2.2 Collaborate with customers (10236)
  4.1.2.3 Develop consensus forecast (10237)
  4.1.2.4 Determine available to promise (10238)
  4.1.2.5 Monitor activity against forecast and revise forecast (10239)
  4.1.2.6 Evaluate and revise forecasting approach (10240)
  4.1.2.7 Measure forecast accuracy (10241)
4.1.3 Create materials plan (10223)
  4.1.3.1 Create unconstrained plan (10242)
  4.1.3.2 Collaborate with supplier and contract manufacturers (10243)
  4.1.3.3 Identify critical materials and supplier capacity (10244)
  4.1.3.4 Monitor material specifications (10245)
  4.1.3.5 Generate constrained plan (10246)
  4.1.3.6 Define production balance and control (14196)
4.1.4 Create and manage master production schedule (10224)
  4.1.4.1 Create site-level production plan and schedule (10247)
  4.1.4.2 Manage work-in-progress inventory (10248)
  4.1.4.3 Collaborate with suppliers (10249)
  4.1.4.4 Execute site-level production plan and schedule (10250)
  4.1.4.5 Monitor master production schedule and plan (17041)
4.1.5 Plan distribution requirements (17042)
  4.1.5.1 Allocate available to promise (10251)
  4.1.5.2 Maintain master data (10252)
  4.1.5.3 Determine finished goods inventory requirements at destination (10253)
  4.1.5.4 Calculate requirements at destination (10254)
  4.1.5.5 Calculate consolidation at source (10255)
  4.1.5.6 Manage collaborative replenishment planning (10256)
  4.1.5.7 Manage requirements for partners (10257)
  4.1.5.8 Calculate destination dispatch plan (10258)
  4.1.5.9 Manage dispatch plan attainment (10259)
  4.1.5.10 Calculate destination load plans (10260)
  4.1.5.11 Manage partner load plan (10261)
  4.1.5.12 Manage cost of supply (10262)
  4.1.5.13 Manage capacity utilization (10263)
4.1.6 Establish distribution planning constraints (10226)
  4.1.6.1 Establish distribution center layout constraints (10267)
  4.1.6.2 Establish inventory management constraints (10268)
4.1.6.3 Establish transportation management constraints (10269)
4.1.7 Review distribution planning policies (10227)
  4.1.7.1 Review distribution network (10264)
  4.1.7.2 Establish sourcing relationships (10265)
  4.1.7.3 Establish dynamic deployment policies (10266)
4.1.8 Assess distribution planning performance (10228)
  4.1.8.1 Establish appropriate performance indicators (metrics) (10270)
  4.1.8.2 Establish monitoring frequency (10271)
  4.1.8.3 Calculate performance measures (10272)
  4.1.8.4 Identify performance trends (10273)
  4.1.8.5 Analyze performance benchmark gaps (10274)
  4.1.8.6 Prepare appropriate reports (10275)
  4.1.8.7 Develop performance improvement plan (10276)
4.1.9 Develop quality standards and procedures (10368)
  4.1.9.1 Establish quality targets (10371)
  4.1.9.2 Develop standard testing procedures (10372)
  4.1.9.3 Communicate quality specifications (10373)
4.2 Perform procurement and contract manufacturing (10216)
4.2.1 Develop sourcing strategies (10277)
  4.2.1.1 Develop procurement plan (10281)
  4.2.1.2 Clarify purchasing requirements (10282)
  4.2.1.3 Develop inventory strategy (10283)
  4.2.1.4 Match needs to supply capabilities (10284)
  4.2.1.5 Analyze organization’s spend profile (10285)
  4.2.1.6 Seek opportunities to improve efficiency and value (10286)
  4.2.1.7 Collaborate with suppliers to identify sourcing opportunities (10287)
4.2.2 Select suppliers and develop/maintain contracts (10278)
  4.2.2.1 Select suppliers (10288)
  4.2.2.2 Certify and validate suppliers (10289)
  4.2.2.3 Negotiate and establish contracts (10290)
  4.2.2.4 Manage contracts (10291)
4.2.3 Order materials and services (10279)
  4.2.3.1 Process/Review requisitions (10292)
  4.2.3.2 Approve requisitions (10293)
  4.2.3.3 Solicit/Track vendor quotes (10294)
  4.2.3.4 Create/Distribute purchase orders (10295)
  4.2.3.5 Expedite orders and satisfy inquiries (10296)
  4.2.3.6 Record receipt of goods (10297)
  4.2.3.7 Research/Resolve exceptions (10298)
4.2.4 Manage suppliers (10280)
  4.2.4.1 Monitor/Manage supplier information (10299)
  4.2.4.2 Prepare/Analyze procurement and vendor performance (10300)
  4.2.4.3 Support inventory and production processes (10301)
  4.2.4.4 Monitor quality of product delivered (10302)
4.3 Manufacture/Produce product (10217)

4.3.1 Schedule production (10303)
  4.3.1.1 Generate line level plan (10306)
  4.3.1.2 Generate detailed schedule (10307)
  4.3.1.3 Schedule production orders and create lots (10308)
  4.3.1.4 Schedule preventive (planned) maintenance (preventive maintenance orders) (10315)
  4.3.1.5 Schedule requested (unplanned) maintenance (work order cycle) (10316)
  4.3.1.6 Release production orders and create lots (10309)

4.3.2 Produce product (10304)
  4.3.2.1 Manage raw material inventory (10310)
  4.3.2.2 Execute detailed line schedule (10311)
  4.3.2.3 Report maintenance issues (10319)
  4.3.2.4 Rerun defective items (10313)
  4.3.2.5 Assess production performance (10314)

4.3.3 Perform quality testing (10369)
  4.3.3.1 Calibrate test equipment (10318)
  4.3.3.2 Perform testing using the standard testing procedure (10374)
  4.3.3.3 Record test results (10375)

4.3.4 Maintain production records and manage lot traceability (10370)
  4.3.4.1 Determine lot numbering system (10376)
  4.3.4.2 Determine lot use (10377)

4.4 Deliver service to customer (10218)

4.4.1 Confirm specific service requirements for individual customer (10320)
  4.4.1.1 Process customer request (10324)
  4.4.1.2 Create customer profile (10325)
  4.4.1.3 Generate service order (10326)

4.4.2 Identify and schedule resources to meet service requirements (10321)
  4.4.2.1 Create resourcing plan and schedule (10327)
  4.4.2.2 Create service order fulfillment schedule (10328)
  4.4.2.3 Develop service order (10329)

4.4.3 Provide service to specific customers (10322)
  4.4.3.1 Organize daily service order fulfillment schedule (10330)
  4.4.3.2 Dispatch resources (10331)
  4.4.3.3 Manage order fulfillment progress (10332)
  4.4.3.4 Validate order fulfillment block completion (10333)
  4.4.3.5 Establish remote service offering (16888)

4.4.4 Ensure quality of service (10323)
  4.4.4.1 Identify completed orders for feedback (10334)

4.4.4.2 Identify incomplete orders and service failures (10335)

4.4.5 Solicit customer feedback on services delivered (10336)

4.4.4.4 Process customer feedback on services delivered (10337)

4.4.5 Define, manage and fulfill warranty services (16889)
  4.4.5.1 Define warranty terms for each product (16890)
  4.4.5.2 Identify preferred warranty fulfillment vendor(s) (16891)
  4.4.5.3 Provide services as per the terms (16892)
  4.4.5.4 Define warranty policies (16893)
  4.4.5.5 Define warranty contracts (16894)
  4.4.5.6 Define claim transaction functionalities and steps involved (16895)
  4.4.5.7 Set up claims administration process (16896)
  4.4.5.8 Detail out claim approvals, checks and balances (16897)
  4.4.5.9 Perform warranty analytics and experience check (16898)

4.4.6 Manage software as a service (SAAS) (16899)
  4.4.6.1 Identify SAAS-related products and services (16900)
  4.4.6.2 Identify and activate SAAS licensing terminals (16901)
  4.4.6.3 Capture customer SAAS usage data (16902)
  4.4.6.4 Identify SAAS services and upgrades (16903)
  4.4.6.5 Identify SAAS warranty support needs (16904)

4.5 Manage logistics and warehousing (10219)

4.5.1 Define logistics strategy (10338)
  4.5.1.1 Translate customer service requirements into logistics requirements (10343)
  4.5.1.2 Design logistics network (10344)
  4.5.1.3 Communicate outsourcing needs (10345)
  4.5.1.4 Develop and maintain delivery service policy (10346)
  4.5.1.5 Optimize transportation schedules and costs (10347)
  4.5.1.6 Define key performance measures (10348)
  4.5.1.7 Define reverse logistics strategy (16905)

4.5.2 Plan and manage inbound material flow (10339)
  4.5.2.1 Plan inbound material receipts (10349)
  4.5.2.2 Manage inbound material flow (10350)
  4.5.2.3 Monitor inbound delivery performance (10351)
  4.5.2.4 Manage flow of returned products (10352)

4.5.3 Operate warehousing (10340)
  4.5.3.1 Track inventory deployment (10353)
  4.5.3.2 Receive, inspect, and store inbound deliveries (10354)
  4.5.3.3 Track product availability (10355)
  4.5.3.4 Pick, pack, and ship product for delivery (10356)
4.5.3.5 Track inventory accuracy (10357)
4.5.3.6 Track third-party logistics storage and shipping performance (10358)
4.5.3.7 Manage physical finished goods inventory (10359)

4.5.4 Operate outbound transportation (10341)
4.5.4.1 Plan, transport, and deliver outbound product (10360)
4.5.4.2 Track carrier delivery performance (10361)
4.5.4.3 Manage transportation fleet (10362)
4.5.4.4 Process and audit carrier invoices and documents (10363)

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

4.5.6 Manage spare parts (16906)
4.5.6.1 Manage information flow between repair stations (16907)
4.5.6.2 Capture spare part warranty information from suppliers (16908)

4.5.6.3 Manage spare parts demand planning exercises (16909)
4.5.6.4 Develop spare part pricing mechanism (16910)
4.5.6.5 Define spare parts delivery terms and condition with suppliers (16911)
4.5.6.6 Establish single point of contact at service call centers (16912)
4.5.6.7 Establish reverse logistics to reclaim parts are under warranty from suppliers (16913)
4.5.6.8 Process parts purchase order (12703)
4.5.6.9 Process inbound parts and confirm receipt (12704)
4.5.6.10 Manage warehousing and storage (12705)
4.5.6.11 Maintain physical inventory (12706)
4.5.6.12 Perform parts cross-docking (12707)
4.5.6.13 Control quality of returned parts (12708)
4.5.6.14 Process sales order (12709)
4.5.6.15 Process outbound parts (12710)
4.5.6.16 Execute parts transportation (12711)
4.5.6.17 Perform billing (12712)
4.5.6.18 Process complaints (12713)
4.5.6.19 Process product service letter (12714)
4.5.6.20 Monitor and control supply chain (12715)

5.0 Manage Customer and Consumer Service (10006)

5.1 Develop consumer care/service strategy (11592)
5.1.1 Establish service levels for consumers (11593)
5.1.2 Align consumer service KPI’s with overall corporate vision/strategy (16914)
5.1.3 Define consumer service channel strategy (16915)
5.1.3.1 Define services delivery strategy (16916)
5.1.3.2 Define location/service delivery site (16917)
5.1.4 Define consumer service indirect channel strategy (16918)
5.1.4.1 Define social channels (16919)
5.1.4.2 Define social media listening tools/channels (16920)

5.2 Plan and manage consumer service operations (11594)
5.2.1 Plan and manage consumer service work force/customer care agents (11595)
5.2.1.1 Forecast volume of consumer service contracts (11596)
5.2.1.2 Schedule consumer service work force (11597)
5.2.1.3 Track work force utilization (11598)
5.2.1.4 Monitor and evaluate quality of consumer interactions with consumer service representatives (11599)
5.2.2 Manage consumer service requests/inquiries (11600)
5.2.2.1 Check warranty eligibility (16921)
5.2.2.2 Receive consumer requests/inquiries (11601)

5.2.2.3 Route consumer requests/inquiries (11602)
5.2.2.4 Respond to consumer requests/inquiries (11603)
5.2.3 Manage consumer complaints (11604)
5.2.3.1 Receive consumer complaints (11605)
5.2.3.2 Route consumer complaints (11606)
5.2.3.3 Schedule repair appointments (16922)
5.2.3.4 Resolve consumer complaints (11607)
5.2.3.5 Create remote repair facility (11608)
5.2.4 Manage consumer service knowledge (16923)
5.2.5 Manage returns (16924)
5.2.5.1 Receive returns merchandise authorization (16925)
5.2.5.2 Process returns merchandise authorization (16926)
5.2.6 Manage upsell/cross sell (16927)
5.2.6.1 Identify and capture upsell/cross-sell opportunities (16928)

5.3 Measure and evaluate consumer satisfaction (11609)
5.3.1 Measure consumer satisfaction level for consumer requests/inquiries (11610)
5.3.1.1 Solicit consumer feedback on customer service experience (11611)
5.3.1.2 Analyze consumer service data and identify improvement opportunities (11612)
5.3.2 Measure consumer satisfaction of customer-complaint handling and resolution (11613)
5.3.2.1 Solicit consumer feedback on complaint handling and resolution (11614)
5.3.2.2 Analyze consumer complaint data and identify improvement opportunities (11615)

5.3.3 Measure consumer satisfaction with products and services (11616)
5.3.3.1 Solicit post-sale consumer feedback on products and services (11617)
5.3.3.2 Collect product return reasons (11618)
5.3.3.3 Analyze product and service satisfaction data and identify improvement opportunities (11619)
5.3.3.4 Feedback the insights to product development and marketing teams (16929)

5.4 Develop customer care/customer service strategy (10378)
5.4.1 Develop customer service segmentation/prioritization (e.g., tiers) (10381)
5.4.1.1 Analyze existing customers (10384)
5.4.1.2 Analyze feedback of customer’s needs (10385)
5.4.2 Define customer service policies and procedures (10382)
5.4.3 Establish service levels for customers (10383)

5.5 Plan and manage customer service operations (10379)
5.5.1 Plan and manage customer service work force (10387)
5.5.1.1 Forecast volume of customer service contacts (10390)
5.5.1.2 Schedule customer service work force (10391)
5.5.1.3 Track work force utilization (10392)
5.5.1.4 Monitor and evaluate quality of customer interactions with customer service representatives (10393)
5.5.2 Manage customer service requests/inquiries (10388)
5.5.2.1 Check warranty/service eligibility (16930)
5.5.2.2 Receive customer requests/inquiries (10394)
5.5.2.3 Route customer requests/inquiries (10395)
5.5.2.4 Respond to customer requests/inquiries (10396)
5.5.3 Manage customer complaints (10389)
5.5.3.1 Receive customer complaints (10397)
5.5.3.2 Route customer complaints (10398)
5.5.3.3 Resolve customer complaints (10399)

5.5.4 Respond to customer complaints (10400)
5.5.5 Manage customer service knowledge (16931)
5.5.5.1 Receive returns merchandise authorization (16933)
5.5.5.2 Process returns merchandise authorization (16934)
5.5.6 Manage up-sell/cross-sell (16935)
5.5.6.1 Identify and capture up-sell/cross-sell opportunities (16936)
5.5.6.2 Handover opportunities to sales effectively (16937)

5.6 Measure and evaluate customer service operations (10380)
5.6.1 Identify key metrics for assessing customer service (11620)
5.6.2 Track performance against customer service scorecard (11621)
5.6.3 Measure customer satisfaction with customer requests/inquiries handling (10401)
5.6.3.1 Solicit customer feedback on customer service experience (11687)
5.6.3.2 Analyze customer service data and identify improvement opportunities (11688)
5.6.4 Measure customer satisfaction with customer-complaint handling and resolution (10402)
5.6.4.1 Solicit customer feedback on complaint handling and resolution (11236)
5.6.4.2 Analyze customer complaint data and identify improvement opportunities (11237)
5.6.5 Measure customer satisfaction with products and services (10403)
5.6.5.1 Gather and solicit post-sale customer feedback on products and services (11238)
5.6.5.2 Solicit post-sale customer feedback on ad effectiveness (11239)
5.6.5.3 Collect warranty data and product return reasons (10408)
5.6.5.4 Analyze product and service satisfaction data and identify improvement opportunities (11240)
5.6.5.5 Provide feedback for manufacturing issues to contract manufacturers and product design to the design tea (11241)

6.0 Develop and Manage Human Capital (10007)

6.1 Develop and manage human resources (HR) planning, policies, and strategies (17043)
6.1.1 Develop human resources strategy (10415)
6.1.1.1 Identify strategic HR needs (10418)
6.1.1.2 Define HR and business function roles and accountability (10419)
6.1.1.3 Determine HR costs (10420)
6.1.1.4 Establish HR measures (10421)
6.1.1.5 Communicate HR strategies (10422)
6.1.1.6 Develop strategy for HR systems/technologies/tools (10432)
6.1.2 Develop and implement human resources plans (10416)
6.1.2.1 Gather skill requirements according to
corporate strategy and market environment

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 high performers/leadership programs (10428)

6.1.2.6 Develop employee diversity plan (10427)

6.1.2.7 Develop training program (11622)

6.1.2.8 Develop recruitment program (11623)

6.1.2.9 Develop other HR programs (10429)

6.1.2.10 Develop HR policies (10429)

6.1.2.11 Administer HR policies (10430)

6.1.2.12 Plan employee benefits (10431)

6.1.2.13 Develop work force strategy models (10433)

6.1.3 Monitor and update strategy, plans, and policies (10417)

6.1.3.1 Measure realization of objectives (10434)

6.1.3.2 Measure contribution to business strategy (10435)

6.1.3.3 Communicate plans and provide updates to stakeholders (10436)

6.1.3.4 Determine value added from HR function (10437)

6.1.3.5 Review and revise HR plans (10438)

6.1.4 Develop competency management models (17046)

6.2 Recruit, source, and select employees (10410)

6.2.1 Manage employee requisitions (10439)

6.2.1.1 Align staffing plan to work force plan and business unit strategies/resource needs (10445)

6.2.1.2 Develop and open job 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)

6.2.1.8 Manage requisition dates (10452)

6.2.2 Recruit/Source candidates (10440)

6.2.2.1 Determine recruitment methods and channels (10453)

6.2.2.2 Develop employer recruitment branding through social media channels (16939)

6.2.2.3 Perform recruiting activities/events (10454)

6.2.2.4 Manage recruitment vendors (10455)

6.2.2.5 Manage employee referral programs (17047)

6.2.2.6 Manage recruitment channels (17048)

6.2.3 Screen and select candidates (17049)

6.2.3.1 Identify and deploy candidate selection tools (10456)

6.2.3.2 Interview candidates (10457)

6.2.3.3 Test candidates (10458)

6.2.3.4 Select and reject candidates (10459)

6.2.3.5 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)

6.2.4.3 Hire candidate (10465)

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)

6.3 Develop and counsel employees (10411)

6.3.1 Manage employee orientation and deployment (10469)

6.3.1.1 Create/Maintain employee on-boarding program (10474)

6.3.1.2 Evaluate the effectiveness of employee on-boarding program (11243)

6.3.1.3 Execute onboarding 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)

6.3.2.3 Evaluate and review performance program (10481)

6.3.3 Manage employee development (10472)

6.3.3.1 Define employee development guidelines (10487)

6.3.3.2 Develop employee career plans (10488)

6.3.3.3 Manage employee skills development (17051)

6.3.4 Develop and train employees (10473)

6.3.4.1 Align employee and organization development needs (10490)

6.3.4.2 Define employee competencies (16940)

6.3.4.3 Align learning programs with competencies (10491)

6.3.4.4 Establish training needs by analysis of required and available skills (10492)

6.3.4.5 Develop, conduct, and manage employee and/or management training programs (10493)

6.3.5 Develop and train customer service representatives (16941)

6.3.6 Manage employee relations (17052)

6.3.6.1 Manage health and safety (10482)

6.3.6.2 Manage labor relations (10483)

6.3.6.3 Manage collective bargaining process (10484)

6.3.6.4 Manage labor management partnerships (10485)

6.3.6.5 Identify customer service training needs (16942)

6.4 Reward and retain employees (10412)

6.4.1 Develop and manage reward, recognition, and motivation programs (17053)
6.4.1 Develop salary/compensation structure and plan (10498)

6.4.1.1 Develop salary/compensation structure and plan (10498)

6.4.1.2 Develop benefits and reward plan (10499)

6.4.1.3 Perform competitive analysis of benefit and rewards (10500)

6.4.1.4 Identify compensation requirements based on financial, benefits, and HR policies (10501)

6.4.1.5 Administer compensation and rewards to employees (10502)

6.4.1.6 Reward and motivate employees (10503)

6.4.2 Develop benefits and reward plan (10499)

6.4.2.1 Deliver employee benefits program (10504)

6.4.2.2 Administer benefit enrollment (10505)

6.4.2.3 Process claims (10506)

6.4.2.4 Perform benefit reconciliation (10507)

6.4.3 Perform competitive analysis of benefit and rewards (10500)

6.4.3.1 Perform competitive analysis of benefit and rewards (10500)

6.4.3.2 Identify compensation requirements based on financial, benefits, and HR policies (10501)

6.4.3.3 Administer compensation and rewards to employees (10502)

6.4.3.4 Reward and motivate employees (10503)

6.4.4 Administer compensation and rewards to employees (10502)

6.4.5 Administer benefits (10495)

6.4.5.1 Administer employee benefits program (10504)

6.4.5.2 Administer benefit enrollment (10505)

6.4.5.3 Process claims (10506)

6.4.5.4 Perform benefit reconciliation (10507)

6.4.6 Administer employee assistance and retention (17054)

6.4.6.1 Deliver programs to support work/life balance for employees (10508)

6.4.6.2 Develop family support systems (10509)

6.4.6.3 Review retention and motivation indicators (10510)

6.4.6.4 Review compensation plan (10511)

6.4.7 Administer employee assistance and retention (17054)

6.4.7.1 Deliver programs to support work/life balance for employees (10508)

6.4.7.2 Develop family support systems (10509)

6.4.7.3 Review retention and motivation indicators (10510)

6.4.7.4 Review compensation plan (10511)

6.4.8 Administer payroll (10497)

6.5 Redeploy and retire employees (10413)

6.5.1 Manage promotion and demotion process (10512)

6.5.2 Manage separation (10513)

6.5.3 Manage retirement (10514)

6.5.4 Manage leave of absence (10515)

6.5.5 Develop and implement employee outplacement (10516)

6.5.6 Manage deployment of personnel (10517)

6.5.7 Relocate employees, and manage assignments (17055)

6.5.8 Manage expatriates (10520)

6.6 Manage employee information and analytics (17056)

6.6.1 Manage employee communication (10528)

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 Develop employee communication plan (10529)

6.6.7.2 Manage/Collect employee suggestions and perform employee research (10530)

6.6.7.3 Conduct employee engagement surveys (16944)

6.6.7.4 Manage employee communication using social media channels (16945)

6.6.7.5 Manage employee grievances (10531)

6.6.7.6 Deliver employee communications (10532)

6.7 Manage employee information and analytics (17056)

7.0 Manage Information Technology (10008)

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

7.1.1 Develop the enterprise IT strategy (10570)

7.1.1.1 Develop IT strategy based on business strategy and initiatives (16946)

7.1.1.2 Build strategic intelligence (10603)

7.1.1.3 Identify long-term IT needs of the enterprise in collaboration with stakeholders (10604)

7.1.1.4 Define strategic standards, guidelines, and principles (10605)

7.1.1.5 Define and establish IT architecture and development standards (10606)

7.1.1.6 Define strategic vendors for IT components (10607)

7.1.1.7 Establish IT governance organization and processes (10608)

7.1.1.8 Build strategic plan to support business objectives (10609)

7.1.2 Define the enterprise architecture (10571)

7.1.2.1 Establish the enterprise architecture definition (10611)

7.1.2.2 Confirm enterprise architecture maintenance approach (10612)

7.1.3 Manage the enterprise IT portfolio (10572)

7.1.3.1 Establish the IT portfolio (10616)

7.1.3.2 Analyze and evaluate the value of the IT portfolio for the enterprise (10617)

7.1.3.3 Provision resources in accordance with strategic priorities (10618)

7.1.4 Perform IT research and innovation (10573)

7.1.4.1 Research technologies to innovate IT services and solutions (10620)

7.1.4.2 Transition viable technologies for IT services and solutions development (10621)

7.1.5 Evaluate and communicate IT business value and performance (10575)

7.1.5.1 Establish and monitor key performance indicators (10625)

7.1.5.2 Evaluate IT plan performance (10626)

7.1.5.3 Communicate IT value (10627)
7.1.6 Manage strategic IT service providers (16947)
  7.1.6.1 Evaluate and select IT service providers (16948)
  7.1.6.2 Manage contracts with IT service providers (16949)
  7.1.6.3 Manage and monitor IT infrastructure operations of service providers (16950)
  7.1.6.4 Manage and monitor IT hardware and software assets related to service providers (16951)
  7.1.6.5 Manage, and monitor problems, incidents, and inquiries related to service providers (16952)
  7.1.6.6 Monitor network connectivity to service providers (16953)
  7.1.6.7 Extend security to contractors and service providers (16954)
  7.1.6.8 Test/evaluate and audit information control for service providers (16955)

7.2 Develop and manage IT customer relationships (10564)
  7.2.1 Develop IT services and solutions strategy (10578)
    7.2.1.1 Research IT services and solutions to address business and user requirements (11244)
    7.2.1.2 Translate business and user requirements into IT services and solutions requirements (11245)
    7.2.1.3 Formulate IT services and solutions strategic initiatives (11246)
    7.2.1.4 Coordinate strategies with internal stakeholders to ensure alignment (11247)
    7.2.1.5 Evaluate and select IT services and solutions strategic initiatives (11248)
  7.2.2 Develop and manage IT service levels (10579)
    7.2.2.1 Create and maintain the IT services and solutions catalog (10640)
    7.2.2.2 Establish and maintain business and IT service-level agreements (10641)
    7.2.2.3 Evaluate and report service-level attainment results (10642)
    7.2.2.4 Communicate business and IT service-level improvement opportunities (10643)
  7.2.3 Perform demand-side management (DSM) for IT services (10580)
    7.2.3.1 Analyze IT services and solutions consumption and usage (10644)
    7.2.3.2 Develop and implement incentive programs that improve consumption efficiency (10645)
    7.2.3.3 Develop volume/unit forecast for IT services and solutions (10646)
  7.2.4 Manage IT customer satisfaction (10581)
    7.2.4.1 Capture and analyze customer satisfaction (10647)
    7.2.4.2 Assess and communicate customer satisfaction patterns (10648)
    7.2.4.3 Initiate improvements based on customer satisfaction patterns (10649)
  7.2.5 Market IT services and solutions (10582)

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

7.3 Develop and implement security, privacy, and data protection controls (11220)
  7.3.1 Establish information security, privacy, and data protection strategies and levels (11220)
  7.3.2 Test, evaluate, and implement information security and privacy and data protection controls (11231)

7.4 Manage enterprise information (10565)
  7.4.1 Develop information and content management strategies (10583)
    7.4.1.1 Understand information and content management needs and the role of IT services for executing the business strategy (10654)
    7.4.1.2 Assess the information and content management implications of new technologies (10655)
    7.4.1.3 Identify and prioritize information and content management actions (10656)
  7.4.2 Define the enterprise information architecture (10584)
    7.4.2.1 Define information elements, composite structure, logical relationships and constraints, taxonomy, and derivation rules (10657)
    7.4.2.2 Define information access requirements (10658)
    7.4.2.3 Establish data custodianship (10659)
    7.4.2.4 Manage changes to content data architecture requirements (10660)
  7.4.3 Manage information resources (10585)
    7.4.3.1 Define the enterprise information/data policies and standards (10661)
    7.4.3.2 Develop and implement data and content administration (10662)
  7.4.4 Perform enterprise data and content management (10586)
    7.4.4.1 Define sources and destinations of content data (10663)
    7.4.4.2 Manage technical interfaces to users of content (10664)
    7.4.4.3 Manage retention, revision, and retirement of enterprise information (10665)

7.5 Develop and maintain information technology solutions (10566)
  7.5.1 Develop the IT development strategy (10587)
    7.5.1.1 Establish sourcing strategy for IT development (10666)
    7.5.1.2 Define development processes, methodologies, and tools standards (10667)
7.5.1.3 Select development methodologies and tools (10668)
7.5.2 Perform IT services and solutions life cycle planning (10588)
  7.5.2.1 Plan development of new requirements (10669)
  7.5.2.2 Plan development of feature and functionality enhancement (10670)
  7.5.2.3 Develop life cycle plan for IT services and solutions (10671)
7.5.3 Develop and maintain IT services and solutions architecture (10589)
  7.5.3.1 Create IT services and solutions architecture (10672)
  7.5.3.2 Revise IT services and solutions architecture (10673)
  7.5.3.3 Retire IT services and solutions architecture (10674)
7.5.4 Create IT services and solutions (10590)
  7.5.4.1 Understand confirmed requirements (10675)
  7.5.4.2 Design IT services and solutions (10676)
  7.5.4.3 Acquire/Develop IT service/solution components (10677)
  7.5.4.4 Train services and solutions resources (10678)
  7.5.4.5 Test IT services/solutions (10679)
  7.5.4.6 Confirm customer acceptance (10680)
7.5.5 Maintain IT services and solutions (10591)
  7.5.5.1 Understand upkeep/enhance requirements and defect analysis (10681)
  7.5.5.2 Design change to existing IT service/solution (10682)
  7.5.5.3 Acquire/Develop changed IT service/solution component (10683)
  7.5.5.4 Test IT service/solution change (10684)
  7.5.5.5 Retire solutions and services (10685)
  7.5.5.6 Consolidate services and solutions from the acquired/merged/de-merged organization (16956)
7.6 Deploy information technology solutions (10567)
  7.6.1 Develop the IT deployment strategy (10592)
    7.6.1.1 Establish IT services and solutions change policies (10686)
    7.6.1.2 Define deployment process, procedures, and tools standards (10687)
  7.6.1.3 Select deployment methodologies and tools (10688)
  7.6.2 Plan and implement changes (10593)
    7.6.2.1 Plan change deployment (10689)
    7.6.2.2 Communicate changes to stakeholders (10690)
    7.6.2.3 Administer change schedule (10691)
    7.6.2.4 Train impacted users (10692)
    7.6.2.5 Distribute and install change (10693)
    7.6.2.6 Verify change (10694)
  7.6.3 Plan and manage releases (10594)
    7.6.3.1 Understand and coordinate release design and acceptance (10695)
    7.6.3.2 Plan release rollout (10696)
    7.6.3.3 Distribute and install release (10697)
    7.6.3.4 Verify release (10698)
7.7 Deliver and support information technology services (10568)
  7.7.1 Develop IT services and solution delivery strategy (10595)
    7.7.1.1 Establish sourcing strategy for IT delivery (10699)
    7.7.1.2 Define delivery processes, procedures, and tools standards (10700)
    7.7.1.3 Select delivery methodologies and tools (10701)
  7.7.2 Develop IT support strategy (10596)
    7.7.2.1 Establish sourcing strategy for IT support (10702)
    7.7.2.2 Define IT support services (10703)
  7.7.3 Manage IT infrastructure resources (10597)
    7.7.3.1 Manage IT inventory and assets (10704)
    7.7.3.2 Manage IT resource capacity (10705)
  7.7.4 Manage IT infrastructure operations (10598)
    7.7.4.1 Deliver IT services and solutions (10706)
    7.7.4.2 Perform IT operations support services (10707)
    7.7.4.3 Consolidate IT operations support services (16957)
  7.7.5 Support IT services and solutions (10599)
    7.7.5.1 Manage availability (10708)
    7.7.5.2 Manage facilities (10709)
    7.7.5.3 Manage backup/recovery (10710)
    7.7.5.4 Manage performance and capacity (10711)
    7.7.5.5 Manage incidents (10712)
    7.7.5.6 Manage problems (10713)
    7.7.5.7 Manage inquiries (10714)
## 8.0 Manage Financial Resources (10009)

### 8.1 Perform planning and management accounting (10728)

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

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

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

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

### 8.2 Perform revenue accounting (10729)

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

8.2.2 Invoice customer (10743)
- 8.2.2.1 Maintain customer/product master files (10794)
- 8.2.2.2 Generate customer billing data (10795)
- 8.2.2.3 Transmit billing data to customers (10796)
- 8.2.2.4 Post receivable entries (10797)
- 8.2.2.5 Resolve customer billing inquiries (10798)

8.2.3 Process accounts receivable (AR) (10744)
- 8.2.3.1 Establish AR policies (10799)
- 8.2.3.2 Receive/Deposit customer payments (10800)
- 8.2.3.3 Apply cash remittances (10801)

8.2.4 Manage and process collections (10745)
- 8.2.4.1 Establish policies for delinquent accounts (10804)
- 8.2.4.2 Analyze delinquent account balances (10805)
- 8.2.4.3 Correspond/Negotiate with delinquent accounts (10806)
- 8.2.4.4 Discuss account resolution with internal parties (10807)
- 8.2.4.5 Process adjustments/write off balances (10808)

8.2.5 Manage and process adjustments/deductions (10746)
- 8.2.5.1 Establish policies/procedures for adjustments (10809)
- 8.2.5.2 Analyze adjustments (10810)
- 8.2.5.3 Correspond/Negotiate with customer (10811)
- 8.2.5.4 Discuss resolution with internal parties (10812)
- 8.2.5.5 Prepare chargeback invoices (10813)
- 8.2.5.6 Process related entries (10814)

### 8.3 Perform general accounting and reporting (10730)

8.3.1 Manage policies and procedures (10747)
- 8.3.1.1 Negotiate service-level agreements (10815)
- 8.3.1.2 Establish accounting policies (10816)
- 8.3.1.3 Set and enforce approval limits (10817)
- 8.3.1.4 Establish common financial systems (10818)

8.3.2 Perform general accounting (10748)
- 8.3.2.1 Maintain chart of accounts (10819)
- 8.3.2.2 Process journal entries (10820)
- 8.3.2.3 Process allocations (10821)
- 8.3.2.4 Process period and adjustments (e.g., accruals and currency conversions) (10822)
- 8.3.2.5 Post and reconcile intercompany transactions (10823)
- 8.3.2.6 Reconcile general ledger accounts (10824)
- 8.3.2.7 Perform consolidations and process eliminations (10825)
- 8.3.2.8 Prepare trial balance (10826)
- 8.3.2.9 Prepare and post management adjustments (10827)

8.3.3 Perform fixed-asset accounting (10749)
- 8.3.3.1 Establish fixed-asset policies and procedures (10828)
- 8.3.3.2 Maintain fixed-asset master data files (10829)
- 8.3.3.3 Process and record fixed-asset additions and retirements (10830)
- 8.3.3.4 Process and record fixed-asset adjustments, enhancements, revaluations, and transfers (10831)
8.3.3.5 Process and record fixed-asset maintenance and repair expenses (10832)
8.3.3.6 Calculate and record depreciation expense (10833)
8.3.3.7 Reconcile fixed-asset ledger (10834)
8.3.3.8 Track fixed-assets including physical inventory (10835)
8.3.3.9 Provide fixed-asset data to support tax, statutory, and regulatory reporting (10836)

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

8.4 Manage fixed-asset project accounting (10731)
8.4.1 Perform capital planning and project approval (10751)
8.4.1.1 Develop capital investment policies and procedures (10844)
8.4.1.2 Develop and approve capital expenditure plans and budgets (10845)
8.4.1.3 Review and approve capital projects and fixed-asset acquisitions (10846)
8.4.1.4 Conduct financial justification for project approval (10847)
8.4.2 Perform capital project accounting (10752)
8.4.2.1 Create project account codes (10848)
8.4.2.2 Record project-related transactions (10849)
8.4.2.3 Monitor and track capital projects and budget spending (10850)
8.4.2.4 Close/capitalize projects (10851)
8.4.2.5 Measure financial returns on completed capital projects (10852)

8.5 Process payroll (10732)
8.5.1 Report time (10753)
8.5.1.1 Establish policies and procedures (10853)
8.5.1.2 Collect and record employee time worked (10854)
8.5.1.3 Analyze and report paid and unpaid leave (10855)
8.5.1.4 Monitor regular, overtime, and other hours (10856)
8.5.1.5 Analyze and report employee utilization (10857)
8.5.2 Manage pay (10754)
8.5.2.1 Enter employee time worked into payroll system (10858)
8.5.2.2 Maintain and administer employee earnings information (10859)
8.5.2.3 Maintain and administer applicable deductions (10860)
8.5.2.4 Monitor changes in tax status of employees (10861)
8.5.2.5 Process and distribute payments (10862)
8.5.2.6 Process and distribute manual checks (10863)
8.5.2.7 Process period-end adjustments (10864)
8.5.2.8 Respond to employee payroll inquiries (10865)
8.5.3 Process payroll taxes (10755)
8.5.3.1 Calculate and pay applicable payroll taxes (10866)
8.5.3.2 Produce and distribute employee annual tax statements (10867)
8.5.3.3 File regulatory payroll tax forms (10868)

8.6 Process accounts payable and expense reimbursements (10733)
8.6.1 Process accounts payable (AP) (10756)
8.6.1.1 Verify AP pay file with purchase order vendor master file (10869)
8.6.1.2 Maintain/Manage electronic commerce (10870)
8.6.1.3 Audit invoices and key data in AP system (10871)
8.6.1.4 Approve payments (10872)
8.6.1.5 Process financial accruals and reversals (10873)
8.6.1.6 Process taxes (10874)
8.6.1.7 Research/Resolve exceptions (10875)
8.6.1.8 Process payments (10876)
8.6.1.9 Respond to AP inquiries (10877)
8.6.1.10 Retain records (10878)
8.6.1.11 Adjust accounting records (10879)
8.6.2 Process expense reimbursements (10757)
8.6.2.1 Establish and communicate expense reimbursement policies and approval limits (10880)
8.6.2.2 Capture and report relevant tax data (10881)
8.6.2.3 Approve reimbursements and advances (10882)
8.6.2.4 Process reimbursements and advances (10883)
8.6.2.5 Manage personal accounts (10884)

8.7 Manage treasury operations (10734)
8.7.1 Manage treasury policies and procedures (10758)
8.7.1.1 Establish scope and governance of treasury operations (10885)
8.7.1.2 Establish and publish treasury policies (10886)
8.7.1.3 Develop treasury procedures (10887)
8.7.1.4 Monitor treasury procedures (10888)
8.7.1.5 Audit treasury procedures (10889)
8.7.1.6 Revise treasury procedures (10890)
8.7.1 Develop and confirm internal controls for treasury (10891)
8.7.1.8 Define system security requirements (10892)

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

8.7.3 Manage in-house bank accounts (10760)
8.7.3.1 Manage in-house bank accounts for subsidiaries (10901)
8.7.3.2 Manage and facilitate inter-company borrowing transactions (10902)
8.7.3.3 Manage centralized outgoing payments on behalf of subsidiaries (10903)
8.7.3.4 Manage central incoming payments on behalf of subsidiaries (10904)
8.7.3.5 Manage internal payments and netting transactions (10905)
8.7.3.6 Calculate interest and fees for in-house bank accounts (10906)
8.7.3.7 Provide account statements for in-house bank accounts (10907)

8.7.4 Manage debt and investment (10761)
8.7.4.1 Manage financial intermediary relationships (10908)
8.7.4.2 Manage liquidity (10909)
8.7.4.3 Manage issuer exposure (10910)
8.7.4.4 Process and oversee debt and investment transactions (10911)
8.7.4.5 Process and oversee foreign currency transactions (10912)
8.7.4.6 Produce debt and investment accounting transaction reports (10913)
8.7.4.7 Process and oversee interest rate transactions (14210)

8.7.5 Monitor and execute risk and hedging transactions (11208)
8.7.5.1 Manage interest-rate risk (11209)
8.7.5.2 Manage foreign-exchange risk (11210)
8.7.5.3 Manage exposure risk (11211)
8.7.5.4 Develop and execute hedging transactions (11212)
8.7.5.5 Evaluate and refine hedging positions (11213)
8.7.5.6 Produce hedge accounting transactions and reports (11214)

8.7.6 Manage financial frauds/dispute cases (16958)
8.7.6.1 Manage disputes due to damaged goods (16959)
8.7.6.2 Manage frauds in sales/service orders (16960)

8.8 Manage internal controls (10735)
8.8.1 Establish internal controls, policies, and procedures (10762)
8.8.1.1 Establish board of directors and audit committee (10914)
8.8.1.2 Define and communicate code of ethics (10915)
8.8.1.3 Assign roles and responsibility for internal controls (10916)
8.8.1.4 Define business process objectives and risks (11250)
8.8.1.5 Define entity/unit risk tolerances (11251)
8.8.2 Operate controls and monitor compliance with internal controls policies and procedures (10763)
8.8.2.1 Design and implement control activities (10917)
8.8.2.2 Monitor control effectiveness (10918)
8.8.2.3 RemEDIATE control deficiencies (10919)
8.8.2.4 Create compliance function (10920)
8.8.2.5 Operate compliance function (10921)
8.8.2.6 Implement and maintain controls-related enabling technologies and tools (10922)
8.8.3 Report on internal controls compliance (10764)
8.8.3.1 Report to external auditors (10923)
8.8.3.2 Report to regulators, share-/debt-holders, securities exchanges, etc. (10924)
8.8.3.3 Report to third parties (e.g., business partners) (10925)
8.8.3.4 Report to internal management (10926)

8.9 Manage taxes (10736)
8.9.1 Develop tax strategy and plan (10765)
8.9.1.1 Develop foreign, national, state, and local tax strategy (10927)
8.9.1.2 Consolidate and optimize total tax plan (10928)
8.9.1.3 Maintain tax master data (10929)
8.9.2 Process taxes (10766)
8.9.2.1 Perform tax planning/strategy (10930)
8.9.2.2 Prepare returns (10931)
8.9.2.3 Prepare foreign taxes (10932)
8.9.2.4 Calculate deferred taxes (10933)
8.9.2.5 Account for taxes (10934)
8.9.2.6 Monitor tax compliance (10935)
8.9.2.7 Address tax inquiries (10936)

8.10 Manage international funds/consolidation (10737)
8.10.1 Monitor international rates (10767)
8.10.2 Manage transactions (10768)
8.10.3 Monitor currency exposure/hedge currency (10769)
9.0 Acquire, Construct, and Manage Assets (10010)

9.1 Design and construct/acquire nonproductive assets (10937)
- Develop property strategy and long-term vision (10941)
  - Confirm alignment of property requirements with business strategy (10955)
  - Assess the external environment (10956)
  - Make build-or-buy decision (10957)
- Develop, construct, and modify sites (10942)
- Plan facility (10943)
  - Design facility (10958)
  - Analyze budget (10959)
  - Select property (10960)
  - Negotiate terms for facility (10961)
  - Manage construction or modification to building (10962)
- Provide workspace and assets (10944)
  - Acquire workspace and assets (10963)
  - Change fit/form/function of workspace and assets (10964)

9.2 Obtain and install assets, equipment and tools (16961)
- Obtain and install equipment (10951)
  - Design engineering solution for the manufacturing process (10969)
  - Install and commission equipment (10971)

9.3 Plan maintenance work (10938)
- Develop ongoing maintenance policies for productive and non-productive asset (10950)

9.3.1.1 Analyze assets and predict maintenance requirements (10967)
9.3.1.2 Develop approach to integrate preventive maintenance into production schedule (10968)
9.3.2 Perform preventive maintenance (16472)
  - Perform time based preventive maintenance (16962)
  - Perform counter based preventive maintenance (16963)
  - Perform analytics on productive assets for fault and repair (16964)
9.3.3 Perform corrective maintenance (16473)
  - Create manual/automatic notification (16965)
  - Create and schedule order (16966)
  - Enforce all safety measures before repair (16967)
  - Settle and complete order (16968)
  - Archive maintenance documents and perform evaluations (16969)
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