OVERVIEW

Cross Industry Process Classification Framework® (PCF) is a taxonomy of cross-functional business processes intended to allow the objective comparison of organizational performance within and among organizations. The PCF was developed by APQC and its member companies as an open standard to facilitate improvement through process management and benchmarking, regardless of industry, size, or location. The PCF organizes operating and management processes into 13 enterprise-level categories, including process groups and more than 1,000 processes and associated activities. The PCF, its associated measures, and definitions are available for download at no charge at www.apqc.org/pcf.

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.
PROCESS CLASSIFICATION FRAMEWORK®

LOOKING FORWARD
The cross-industry and industry Process Classification Frameworks are evolving models, which APQC will continue to enhance and improve regularly. Thus, APQC encourages comments, suggestions, and more importantly, the sharing of insights from having applied the PCF within your organization. Share your suggestions and experiences with the PCF by e-mailing pcf_feedback@apqc.org.

ABOUT APQC
An internationally recognized resource for process and performance improvement, APQC helps organizations adapt to rapidly changing environments, build new and better ways to work, and succeed in a competitive marketplace. With a focus on productivity, knowledge management, benchmarking, and quality improvement initiatives, APQC works with its member organizations to identify best practices; discover effective methods of improvement; broadly disseminate findings; and connect individuals with one another and the knowledge, training, and tools they need to succeed. Founded in 1977, APQC is a member-based nonprofit serving organizations around the world in all sectors of business, education, and government. APQC is also a proud winner of the 2003, 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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This APQC Process Classification Framework® (“PCF”) is an open standard developed by APQC, a nonprofit that promotes benchmarking and best practices worldwide. The PCF is intended to facilitate organizational improvement through process management and benchmarking, regardless of industry, size, or geography. To download the full PCF or industry-specific versions of the PCF, as well as associated measures and benchmarking, please visit www.apqc.org/pcf.
PCF LEVELS EXPLAINED

**Level 1 - Category**

10.0 Manage Enterprise Risk, Compliance, Remediation and Resiliency (16437)

Represents 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.

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**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.
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  Identify competitors (19945)
   1.1.1.2  Analyze and evaluate competition (10021)
   1.1.1.3  Identify economic trends (10022)
   1.1.1.4  Identify political and regulatory issues (10023)
   1.1.1.5  Assess new technology innovations (10024)
   1.1.1.6  Analyze demographics (10025)
   1.1.1.7  Identify social and cultural changes (10026)
   1.1.1.8  Identify ecological concerns (10027)
   1.1.1.9  Identify intellectual property concerns (16790)
   1.1.1.10 Evaluate IP acquisition options (16791)

1.1.2  Survey market and determine customer needs and wants (10018)
   1.1.2.1  Conduct qualitative/quantitative research and assessments (10028)
   1.1.2.2  Capture customer needs and wants (19946)
   1.1.2.3  Assess customer needs and wants (19947)

1.1.3  Assess the internal environment (10019)
   1.1.3.1  Analyze organizational characteristics (10030)
   1.1.3.2  Analyze internal operations (19948)
   1.1.3.3  Create baselines for current processes (10031)
   1.1.3.4  Analyze systems and technology (10032)
   1.1.3.5  Analyze financial health (10033)
   1.1.3.6  Identify core competencies (10034)

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   1.1.4.1  Define the strategic vision (19949)
   1.1.4.2  Align stakeholders around strategic vision (10035)
   1.1.4.3  Communicate strategic vision to stakeholders (10036)

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   1.2.1.2  Formulate mission (10045)
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1.2.2.4  Develop B2C strategy (16802)

1.2.2.5  Develop partner/alliance strategy (16803)

1.2.2.6  Develop merger/demerge/acquisition/exit strategy (16805)

1.2.2.7  Develop innovation strategy (16806)

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1.2.2.10  Develop shared services strategy (19951)

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   3.3.6.1 Monitor and respond to social media activity (16627)
   3.3.6.2 Analyze customer website activity (16614)
   3.3.6.3 Analyze customer purchase patterns (16615)
   3.3.6.4 Develop business rules to provide personalized offers (16616)
   3.3.6.5 Monitor effectiveness of personalized offers and adjust offers accordingly (16617)

3.3.7 Manage product marketing content (16629)
   3.3.7.1 Manage product images (16630)
   3.3.7.2 Manage product copy (18130)

3.4 Develop sales strategy (10103)
   3.4.1 Develop sales forecast (10129)
     3.4.1.1 Gather current and historic order information (10134)
     3.4.1.2 Analyze sales trends and patterns (10135)
     3.4.1.3 Generate sales forecast (10136)
     3.4.1.4 Analyze historical and planned promotions and events (10137)
   3.4.2 Develop sales partner/alliance relationships (10130)
     3.4.2.1 Identify alliance opportunities (10138)
     3.4.2.2 Design alliance programs and methods for selecting and managing relationships (10139)
     3.4.2.3 Select alliances (10140)
     3.4.2.4 Develop trade customer trade strategy and customer objectives/targets (11465)
     3.4.2.5 Define trade programs and funding options (11521)
     3.4.2.6 Conduct planning activities for major trade customers (11466)
     3.4.2.7 Develop partner and alliance management strategies (10141)
     3.4.2.8 Establish partner and alliance management goals (10142)
     3.4.2.9 Establish partner and alliance agreements (18629)
     3.4.2.10 Develop promotional and category management calendars (trade marketing calendars) (11522)
     3.4.2.11 Create strategic and tactical sales plans by customer (11523)
     3.4.2.12 Communicate planning information to customer teams (11488)
   3.4.3 Establish overall sales budgets (10131)
     3.4.3.1 Calculate product market share (17682)
     3.4.3.2 Calculate product revenue (10143)
     3.4.3.3 Determine variable costs (10144)
3.4.3.4 Determine overhead and fixed costs (10145)
3.4.3.5 Calculate net profit (10146)
3.4.3.6 Create budget (10147)
3.4.4 Establish sales goals and measures (10132)
3.4.5 Establish customer management measures (10133)
3.5 Develop and manage sales plans (10105)

3.5.1 Manage leads/opportunities (20594)
3.5.1.1 Identify potential customers (10188)
3.5.1.2 Identify/receive leads/opportunities (10189)
3.5.1.3 Validate and qualify leads/opportunities (18115)
3.5.1.4 Match opportunities to business strategy (11773)
3.5.1.5 Develop opportunity win plans (18116)
3.5.1.6 Manage opportunity pipeline (20011)
3.5.1.7 Determine sales resource allocation (10209)
3.5.1.8 Manage customer sales calls (10184)
  3.5.1.8.1 Perform sales calls (10190)
  3.5.1.8.2 Perform pre-sales activities (10191)
  3.5.1.8.3 Manage customer meetings/workshops (20012)
  3.5.1.8.4 Close the sale (10192)
  3.5.1.8.5 Record outcome of sales process (10193)
3.5.2 Manage customers and accounts (10183)
  3.5.2.1 Select key customers/accounts (20013)
  3.5.2.2 Develop sales/key account plan (11173)
  3.5.2.3 Manage sales/key account plan (20014)
  3.5.2.4 Manage customer relationships (11174)
  3.5.2.5 Manage customer master data (14208)
    3.5.2.5.1 Collect and merge internal and third-party customer information (16598)
    3.5.2.5.2 De-duplicate customer data (16599)
3.5.3 Develop and manage sales proposals, bids, and quotes (11779)
  3.5.3.1 Receive Request For Proposal (RFP)/Request For Quote (RFQ) (11781)
  3.5.3.2 Refine customer requirements (11780)
  3.5.3.3 Review RFP/RFQ request (11782)
  3.5.3.4 Perform competitive analysis (11783)
  3.5.3.5 Validate with strategy/business plans (11784)
  3.5.3.6 Understand customer business and requirements (11785)
  3.5.3.7 Develop solution and delivery approach (20015)
  3.5.3.8 Identify staffing requirements (11787)
  3.5.3.9 Develop pricing and scheduling estimates (11788)
3.5.4 Manage sales orders (10185)
  3.5.4.1 Accept and validate sales orders (10194)
  3.5.4.2 Collect and maintain account information (10195)
    3.5.4.2.1 Administer key account details (10201)
    3.5.4.2.2 Retrieve full customer details (10202)
    3.5.4.2.3 Modify involved party details (10203)
    3.5.4.2.4 Record address details (10204)
    3.5.4.2.5 Record contact details (10205)
    3.5.4.2.6 Record key customer communication profile details (10206)
    3.5.4.2.7 Review involved party information (10207)
    3.5.4.2.8 Terminate involved party information (10208)
  3.5.4.3 Determine availability (10196)
  3.5.4.4 Determine fulfillment process (10197)
  3.5.4.5 Enter orders into system (10198)
  3.5.4.6 Identify/perform cross-sell/up-sell activity (17404)
  3.5.4.7 Process back orders and updates (10199)
  3.5.4.8 Handle sales order inquiries including post-order fulfillment transactions (10200)
3.5.5 Manage sales partners and alliances (10187)
  3.5.5.1 Provide sales and product/service training to sales partners/alliances (10211)
    3.5.5.1.1 Provide certification enablement training (20019)
    3.5.5.1.2 Manage certifications and skills (20020)
    3.5.5.1.3 Provide support to partners/alliances (20021)
  3.5.5.2 Provide marketing materials to sales partners/alliances (18641)
  3.5.5.3 Evaluate partner/alliance results (10214)
  3.5.5.4 Manage sales partner/alliance master data (14209)

3.5.6 Conduct profitability analysis (11789)
3.5.7 Manage internal reviews (20016)
3.5.8 Manage internal approvals (20017)
3.5.9 Submit/present bid/proposal/quote to customer (11790)
3.5.10 Revise bid/proposal/quote (20018)
3.5.11 Manage notification outcome (11793)
4.0  Deliver Physical Products (20022)

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 outsourcing policies (10231)
4.1.1.4  Define capital expense policies (10232)
4.1.1.5  Define capacities (10233)
4.1.1.6  Define production network and supply constraints (10234)
4.1.1.7  Define production process (14193)
4.1.1.8  Define standard operating procedures (19551)
4.1.1.9  Define production workplace layout and infrastructure (14194)
4.1.2  Manage demand for products and services (10222)

4.1.2.1  Develop baseline demand forecasts (10235)
4.1.2.2  Collaborate demand with customers (10236)
4.1.2.3  Develop demand consensus forecast (10237)
4.1.2.4  Determine available to promise (10238)
4.1.2.5  Monitor activity against demand forecast and revise forecast (10239)
4.1.2.6  Evaluate and revise demand forecasting approach (10240)
4.1.2.7  Measure demand 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  Model production network to enable simulation and optimization (20023)
4.1.4.2  Create master production schedule (20024)
4.1.4.3  Maintain master production schedule (17041)
4.1.5  Plan distribution requirements (17042)
4.1.5.1  Maintain master data (10252)
4.1.5.2  Determine finished goods inventory requirements at destination (10253)
4.1.5.3  Determine product storage facility requirements (19555)
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  Calculate and optimize destination dispatch plan (10258)
4.1.5.8  Manage dispatch plan attainment (10259)
4.1.5.9  Calculate and optimize destination load plans (10260)
4.1.5.10  Manage partner load plan (10261)
4.1.5.11  Manage cost of supply (10262)
4.1.5.12  Manage capacity utilization (10263)
4.1.6  Establish distribution 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)
4.1.6.4  Establish storage management constraints (19558)
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  Develop quality standards and procedures (10368)

4.1.8.1  Establish quality targets (10371)
4.1.8.2  Develop standard testing procedures (10372)
4.1.8.3  Communicate quality specifications (10373)

4.2  Procure materials and services (10216)

4.2.1  Develop sourcing strategies (10277)

4.2.1.1  Develop procurement plan (10281)
4.2.1.2  Clarify purchasing requirements (10282)
4.2.1.3  Develop inventory strategy (10283)
4.2.1.4  Match needs to supply capabilities (10284)
4.2.1.5  Analyze 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 order 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 Produce/Manufacture/Deliver product (10217)
  4.3.1 Schedule production (10303)
    4.3.1.1 Model and simulate plant (19563)
    4.3.1.2 Generate line level plan (10306)
    4.3.1.3 Generate detailed schedule (10307)
    4.3.1.4 Schedule production orders and create lots (10308)
    4.3.1.5 Schedule preventive (planned) maintenance (preventive maintenance orders) (10315)
    4.3.1.6 Schedule requested (unplanned) maintenance (work order cycle) (10316)
    4.3.1.7 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 Monitor and optimize production process (19566)
      4.3.2.5.1 Automate and control plant (19567)
      4.3.2.5.2 Perform advanced process control (19568)
      4.3.2.5.3 Perform real-time optimization (19569)
      4.3.2.5.4 Manage plant alarms and alerts (19570)
    4.3.2.6 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)
    4.3.3.4 Track and analyze non-conformance trends (12045)
    4.3.3.5 Perform root cause analysis (12046)

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 Manage logistics and warehousing (10219)
  4.4.1 Provide logistics governance (10338)
    4.4.1.1 Translate customer service requirements into logistics requirements (10343)
    4.4.1.2 Design logistics network (10344)
    4.4.1.3 Communicate outsourcing needs (10345)
    4.4.1.4 Develop and maintain delivery service policy (10346)
    4.4.1.5 Optimize transportation schedules and costs (10347)
    4.4.1.6 Define key performance measures (10348)
    4.4.1.7 Define reverse logistics strategy (16905)
  4.4.2 Plan and manage inbound material flow (10339)
    4.4.2.1 Plan inbound material receipts (10349)
    4.4.2.2 Manage inbound material flow (10350)
    4.4.2.3 Monitor inbound delivery performance (10351)
    4.4.2.4 Manage flow of returned products (10352)
    4.4.2.5 Control quality of returned parts (12708)
  4.4.3 Operate warehousing (10340)
    4.4.3.1 Track inventory deployment (10353)
    4.4.3.2 Receive, inspect, and store inbound deliveries (10354)
    4.4.3.3 Track product availability (10355)
    4.4.3.4 Pick, pack, and ship product for delivery (10356)
    4.4.3.5 Track inventory accuracy (10357)
    4.4.3.6 Track third-party logistics storage and shipping performance (10358)
    4.4.3.7 Manage physical finished goods inventory (10359)
  4.4.4 Operate outbound transportation (10341)
    4.4.4.1 Plan, transport, and deliver outbound product (10360)
    4.4.4.2 Track carrier delivery performance (10361)
    4.4.4.3 Manage transportation fleet (10362)
    4.4.4.4 Process and audit carrier invoices and documents (10363)
    4.4.5 Perform reverse logistics (20149)
5.1 Establish service delivery governance and strategies (20026)

5.1.1 Establish service delivery governance (20027)
  5.1.1.1 Set up and maintain service delivery governance and management system (20028)
  5.1.1.2 Manage service delivery performance (20029)
  5.1.1.3 Manage service delivery development and direction (20030)
  5.1.1.4 Solicit feedback from customer on service delivery satisfaction (20031)

5.1.2 Develop service delivery strategies (20032)
  5.1.2.1 Define service delivery goals (20033)
  5.1.2.2 Define labor policies (20034)
  5.1.2.3 Evaluate resource availability (20035)
  5.1.2.4 Define service delivery network and supply constraints (20036)
  5.1.2.5 Define service delivery process (20037)
  5.1.2.6 Review and validate service delivery procedures (20038)
  5.1.2.7 Define service delivery workplace layout and infrastructure (20039)

5.2 Manage service delivery resources (20040)

5.2.1 Manage service delivery resource demand (20041)
  5.2.1.1 Monitor pipeline (20042)
  5.2.1.2 Develop baseline forecasts (20043)
  5.2.1.3 Collaborate with customers (20044)
  5.2.1.4 Develop consensus forecast (20045)
  5.2.1.5 Determine availability of skills to deliver on current and forecast customer orders (20046)
  5.2.1.6 Monitor activity against forecast and revise forecast (20047)
  5.2.1.7 Evaluate and revise forecasting approach (20048)
  5.2.1.8 Measure forecast accuracy (20049)

5.2.2 Create and manage resource plan (20050)
  5.2.2.1 Define and manage skills taxonomy (20051)
  5.2.2.2 Create resource plan (20052)
  5.2.2.3 Match resource demand with capacity, skills, and capabilities (20053)
  5.2.2.4 Collaborate with suppliers and partners to supplement skills and capabilities (20054)
  5.2.2.5 Identify critical resources and supplier capacity (20055)

5.2.3 Enable service delivery resources (12127)

5.2.3.1 Develop service delivery training plan (12128)
  5.2.3.2 Develop training materials (12129)
  5.2.3.3 Manage training schedule (12131)
  5.2.3.4 Deliver operations training (12132)
  5.2.3.5 Deliver technical training (12133)
  5.2.3.6 Perform skill and capability testing (20057)
  5.2.3.7 Evaluate training effectiveness (12135)

5.3 Deliver service to customer (20058)

5.3.1 Initiate service delivery (20059)
  5.3.1.1 Review contract and agreed terms (20060)
  5.3.1.2 Understand customer requirements and define refine approach (20061)
  5.3.1.3 Modify/review and approve project plan (20062)
  5.3.1.4 Review customer business objectives (20063)
  5.3.1.5 Confirm environmental readiness (20064)
  5.3.1.6 Identify, select, and assign resources (20065)
    5.3.1.6.1 Establish people objectives (20066)
    5.3.1.6.2 Establish engagement rules (20067)
  5.3.1.7 Plan for service delivery (20068)

5.3.2 Execute service delivery (20069)
  5.3.2.1 Analyze environment and customer needs (20070)
  5.3.2.2 Define solution (20071)
  5.3.2.3 Validate solution (20072)
  5.3.2.4 Identify changes (20073)
  5.3.2.5 Obtain approval to proceed (20074)
  5.3.2.6 Make build/buy solution (20075)
  5.3.2.7 Deploy solution (20076)

5.3.3 Complete service delivery (20077)
  5.3.3.1 Conduct service delivery/project review and evaluate success (20078)
  5.3.3.2 Complete/finalize financial management activities (20079)
  5.3.3.3 Confirm delivery according to contract terms (20080)
  5.3.3.4 Release resources (20081)
  5.3.3.5 Manage service delivery completion (20082)
  5.3.3.6 Harvest knowledge (20083)
  5.3.3.7 Archive records and update systems (20084)
### 6.0 Manage Customer Service (20085)

#### 6.1 Develop customer care/customer service strategy (10378)

6.1.1 Define customer service requirements across the enterprise (20086)
6.1.2 Define customer service experience (20087)
6.1.3 Define and manage customer service channel strategy (20088)
6.1.4 Define customer service policies and procedures (10382)
6.1.5 Establish target service level for each customer segment (10383)
6.1.6 Define warranty offering (20089)
   - 6.1.6.1 Determine and document warranty policies (16893)
   - 6.1.6.2 Create and manage warranty rules/claim codes for products (16890)
   - 6.1.6.3 Agree warranty responsibilities with suppliers (20090)
   - 6.1.6.4 Define warranty related offerings for customers (20091)
   - 6.1.6.5 Communicate warranty policies and offerings (12673)
6.1.7 Develop recall strategy (20092)

#### 6.2 Plan and manage customer service contacts (10379)

6.2.1 Plan and manage customer service work force (10387)
   - 6.2.1.1 Forecast volume of customer service contacts (10390)
   - 6.2.1.2 Schedule customer service work force (10391)
   - 6.2.1.3 Track work force utilization (10392)
   - 6.2.1.4 Monitor and evaluate quality of customer interactions with customer service representatives (10393)
6.2.2 Manage customer service problems, requests, and inquiries (10388)
   - 6.2.2.1 Receive customer problems, requests, and inquiries (10394)
   - 6.2.2.2 Analyze problems, requests, and inquiries (13482)
   - 6.2.2.3 Resolve customer problems, requests, and inquiries (10395)
   - 6.2.2.4 Respond to customer problems, requests, and inquiries (10396)
   - 6.2.2.5 Identify and capture upsell/cross-sell opportunities (16928)
   - 6.2.2.6 Deliver opportunity to sales team (16937)
6.2.3 Manage customer complaints (10389)
   - 6.2.3.1 Receive customer complaints (10397)
   - 6.2.3.2 Route customer complaints (10398)
   - 6.2.3.3 Resolve customer complaints (10399)
   - 6.2.3.4 Respond to customer complaints (10400)
   - 6.2.3.5 Analyze customer complaints and response/redressal (19072)
6.2.4 Process returns (20094)
   - 6.2.4.1 Authorize return (10364)
   - 6.2.4.2 Process return and record reason (20095)
6.2.5 Report incidents and risks to regulatory bodies (12840)

#### 6.3 Service products after sales (12658)

6.3.1 Process warranty claims (12669)
   - 6.3.1.1 Receive warranty claim (20096)
   - 6.3.1.2 Validate warranty claim (12671)
   - 6.3.1.3 Investigate warranty issues (20097)
      - 6.3.1.3.1 Define issue (20098)
      - 6.3.1.3.2 Schedule field service (12677)
      - 6.3.1.3.3 Request and receive defective part (12678)
      - 6.3.1.3.4 Investigate issue/perform root cause analysis (20099)
      - 6.3.1.3.5 Receive investigation result/recommendation for corrective action (20100)
   - 6.3.1.4 Determine responsible party (20101)
   - 6.3.1.5 Manage pre-authorisations (20102)
   - 6.3.1.6 Approve or reject warranty claim (12668)
   - 6.3.1.7 Notify originator of approve/reject decision (20103)
   - 6.3.1.8 Authorize payment (20104)
   - 6.3.1.9 Close claim (20105)
   - 6.3.1.10 Reconcile warranty transaction disposition (12667)
6.3.2 Manage supplier recovery (20106)
   - 6.3.2.1 Create supplier recovery claims (20107)
   - 6.3.2.2 Negotiate recoveries with suppliers (20108)
6.3.3 Service products (10218)
   - 6.3.3.1 Identify and schedule resources to meet service requirements (10321)
      - 6.3.3.1.1 Create resourcing plan and schedule (10327)
      - 6.3.3.1.2 Create service order fulfillment schedule (10328)
   - 6.3.3.2 Provide service to specific customers (10322)
      - 6.3.3.2.1 Organize daily service order fulfillment schedule (10330)
      - 6.3.3.2.2 Execute product repair (10331)
6.3.3.2 Ensure quality of service (10323)
6.3.3.2.1 Identify completed service orders for feedback (10334)
6.3.3.2.2 Identify incomplete service orders and service failures (10335)
6.3.3.2.3 Solicit customer feedback on services delivered (10336)
6.3.3.2.4 Process customer feedback on services delivered (10337)

6.3.3.3 Identify completed service orders for feedback (10334)
6.3.3.3.1 Identify incomplete service orders and service failures (10335)
6.3.3.3.2 Solicit customer feedback on services delivered (10336)
6.3.3.3.3 Process customer feedback on services delivered (10337)

6.3.4 Salvage or repair returned products (20109)
6.3.4.1 Perform salvage activities (10366)
6.3.4.2 Manage repair/refurbishment and return to customer/stock (14195)

6.4 Manage product recalls and regulatory audits (20110)
6.4.1 Initiate recall (20111)
6.4.2 Assess the likelihood and consequences of occurrence of any hazards (20112)
6.4.3 Manage recall related communications (20113)
6.4.4 Submit regulatory reports (20114)
6.4.5 Monitor and audit recall effectiveness (20115)
6.4.6 Manage recall termination (20116)

6.5 Evaluate customer service operations and customer satisfaction (20595)
6.5.1 Measure customer satisfaction with customer problems, requests, and inquiries handling (10401)
6.5.1.1 Solicit customer feedback on customer service experience (11687)
6.5.1.2 Analyze customer service data and identify improvement opportunities (11688)
6.5.1.3 Provide customer feedback to product management on customer service experience (18126)
6.5.2 Measure customer satisfaction with customer-complaint handling and resolution (10402)
6.5.2.1 Solicit customer feedback on complaint handling and resolution (11236)
6.5.2.2 Analyze customer complaint data and identify improvement opportunities (11237)
6.5.3 Identify common customer complaints (11689)
6.5.3.1 Gather and solicit post-sale customer feedback on products and services (11238)
6.5.3.2 Solicit post-sale customer feedback on ad effectiveness (11239)
6.5.3.3 Solicit customer feedback on cross-channel experience (20117)
6.5.3.4 Analyze product and service satisfaction data and identify improvement opportunities (11240)
6.5.3.5 Provide feedback and insights to appropriate teams (product design/development, marketing, manufacturing) (11241)
6.5.4 Evaluate and manage warranty performance (12672)
6.5.4.1 Measure customer satisfaction with warranty handling and resolution (20118)
6.5.4.2 Monitor and report on warranty management metrics (12676)
6.5.4.3 Identify improvement opportunities (12677)
6.5.4.4 Identify opportunities to eliminate warranty waste (12674)
6.5.4.5 Investigate fraudulent claims (20120)
6.5.5 Evaluate recall performance (20121)
7.0 Develop and Manage Human Capital (10007)

7.1 Develop and manage human resources planning, policies, and strategies (17043)

7.1.1 Develop and manage human resources planning, policies, and strategies (17043)

7.1.1.1 Identify strategic HR needs (10418)
7.1.1.2 Define HR and business function roles and accountability (10419)
7.1.1.3 Determine HR costs (10420)
7.1.1.4 Establish HR measures (10421)
7.1.1.5 Communicate HR strategies (10422)
7.1.1.6 Develop strategy for HR systems/technologies/tools (10432)

7.1.2 Develop and implement workforce strategy and policies (17045)

7.1.2.1 Gather skill requirements according to corporate strategy and market environment (10423)
7.1.2.2 Plan employee resourcing requirements per business unit/organization (10424)
7.1.2.3 Develop compensation plan (10425)
7.1.2.3.1 Establish incentive plan (10210)
7.1.2.4 Develop succession plan (10426)
7.1.2.5 Develop high performers/leadership programs (16938)
7.1.2.6 Develop employee diversity plan (10427)
7.1.2.7 Develop training program (11622)
7.1.2.8 Develop recruitment program (11623)
7.1.2.9 Develop other HR programs (10428)
7.1.2.10 Develop HR policies (10429)
7.1.2.11 Administer HR policies (10430)
7.1.2.12 Plan employee benefits (10431)
7.1.2.13 Develop workforce strategy models (10433)
7.1.2.14 Implement workforce strategy models (20122)

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

7.1.3.1 Measure realization of objectives (10434)
7.1.3.2 Measure contribution to business strategy (10435)
7.1.3.3 Communicate plans and provide updates to stakeholders (10436)
7.1.3.4 Review and revise HR plans (10438)

7.1.4 Develop competency management models (17046)

7.2 Recruit, source, and select employees (10410)

7.2.1 Manage employee requisitions (10439)

7.2.1.1 Align staffing plan to work force plan and business unit strategies/resource needs (10445)
7.2.1.2 Develop and maintain job descriptions (10447)
7.2.1.3 Open requisitions (10446)
7.2.1.4 Post requisitions (10448)
7.2.1.5 Modify requisitions (10450)
7.2.1.6 Notify hiring manager (10451)
7.2.1.7 Manage requisition dates (10452)

7.2.2 Recruit/Source candidates (10440)

7.2.2.1 Determine recruitment methods and channels (10453)
7.2.2.2 Perform recruiting activities/events (10454)
7.2.2.3 Manage recruitment vendors (10455)
7.2.2.4 Manage employee referral programs (17047)
7.2.2.5 Manage recruitment channels (17048)

7.2.3 Screen and select candidates (20123)

7.2.3.1 Identify and deploy candidate selection tools (10456)
7.2.3.2 Interview candidates (10457)
7.2.3.3 Test candidates (10458)
7.2.3.4 Select and reject candidates (10459)

7.2.4 Manage new hire/re-hire (10443)

7.2.4.1 Draw up and make offer (10463)
7.2.4.2 Negotiate offer (10464)
7.2.4.3 Hire candidate (10465)

7.2.5 Manage applicant information (10444)

7.2.5.1 Obtain candidate background information (10460)
7.2.5.2 Create applicant record (10466)
7.2.5.3 Manage/track applicant data (10467)
7.2.5.3.1 Complete position classification and level of experience (20124)
7.2.5.4 Archive and retain records of non-hires (10468)

7.3 Manage employee on-boarding, development, and training (20599)

7.3.1 Manage employee orientation and deployment (10469)

7.3.1.1 Create/maintain employee on-boarding program (10474)
7.3.1.1.1 Develop employee induction program (10477)
7.3.1.1.2 Maintain/Update employee induction program (10478)

7.3.1.2 Evaluate the effectiveness of the employee on-boarding program (11243)
7.3.1.3 Execute on-boarding program (17050)

7.3.2 Manage employee performance (10470)

7.3.2.1 Define employee performance objectives (10479)
7.3.2.2 Review, appraise, and manage employee performance (10480)
7.3.2.3 Evaluate and review performance program (10481)

7.3.3 Manage employee development (10472)

7.3.3.1 Define employee development guidelines (10487)
7.3.3.2 Develop employee career plans and career paths (10488)
7.3.3.3 Manage employee skill and competency development (17051)

7.3.4 Develop and train employees (10473)

7.3.4.1 Align employee with organization development
6 Define employee competencies (16940)
7.3.4.3 Align learning programs with competencies (10491)
7.3.4.4 Establish training needs by analysis of required and available skills (10492)
7.3.4.5 Develop, conduct, and manage employee and/or management training programs (10493)
7.3.4.6 Manage examinations and certifications (20125)
  7.3.4.6.1 Liaise with external certification authorities (20126)
  7.3.4.6.2 Administer certification tests (20127)
  7.3.4.6.3 Appraise experience qualifications (20128)
  7.3.4.6.4 Administer certificate issue and maintenance (20129)
7.4 Manage employee relations (17052)
  7.4.1 Manage labor relations (10483)
  7.4.2 Manage collective bargaining process (10484)
  7.4.3 Manage labor management partnerships (10485)
  7.4.4 Manage employee grievances (10531)
7.5 Reward and retain employees (10412)
  7.5.1 Develop and manage reward, recognition, and motivation programs (10494)
    7.5.1.1 Develop salary/compensation structure and plan (10498)
    7.5.1.2 Develop benefits and reward plan (10499)
    7.5.1.3 Perform competitive analysis of benefit and rewards (10500)
    7.5.1.4 Identify compensation requirements based on financial, benefits, and HR policies (10501)
    7.5.1.5 Administer compensation and rewards to employees (10502)
    7.5.1.6 Reward and motivate employees (10503)
  7.5.2 Manage and administer benefits (10495)
    7.5.2.1 Deliver employee benefits program (10504)
    7.5.2.2 Administer benefit enrollment (10505)
    7.5.2.3 Process claims (10506)
  7.5.2.4 Perform benefit reconciliation (10507)
  7.5.3 Manage employee assistance and retention (10496)
    7.5.3.1 Deliver programs to support work/life balance for employees (10508)
    7.5.3.2 Develop family support systems (10509)
    7.5.3.3 Review retention and motivation indicators (10510)
    7.5.3.4 Review compensation plan (10511)
  7.5.4 Administer payroll (10497)
7.6 Redeploy and retire employees (10413)
  7.6.1 Manage promotion and demotion process (10512)
  7.6.2 Manage separation (10513)
  7.6.3 Manage retirement (10514)
  7.6.4 Manage leave of absence (10515)
  7.6.5 Develop and implement employee outplacement (10516)
  7.6.6 Manage workforce scheduling (20132)
    7.6.6.1 Receive required resources/skills and capabilities (20133)
    7.6.6.2 Manage resource deployment (10517)
  7.6.7 Relocate employees and manage assignments (17055)
    7.6.7.1 Manage expatriates (10520)
7.7 Manage employee information and analytics (20134)
  7.7.1 Manage reporting processes (10522)
  7.7.2 Manage employee inquiry process (10523)
  7.7.3 Manage and maintain employee data (10524)
  7.7.4 Manage human resource information systems HRIS (10525)
  7.7.5 Develop and manage employee metrics (10526)
  7.7.6 Develop and manage time and attendance systems (10527)
  7.7.7 Manage/Collect employee suggestions and perform employee research (10530)
7.8 Manage employee communication (17057)
  7.8.1 Develop employee communication plan (10529)
  7.8.2 Conduct employee engagement surveys (16944)
7.9 Deliver employee communications (10532)
8.0 Manage Information Technology (IT) (10008)

8.1 Manage the business of information technology (10563)

8.1.1 Develop the enterprise IT strategy (10570)
8.1.1.1 Build strategic intelligence (10603)
8.1.1.2 Identify long-term IT needs of the enterprise in collaboration with stakeholders (10604)
8.1.1.3 Define strategic standards, guidelines, and principles (10605)
8.1.1.4 Define and establish IT architecture and development standards (10606)
8.1.1.5 Define strategic vendors for IT components (10607)
8.1.1.6 Establish IT governance organization and processes (10608)
8.1.1.7 Build strategic roadmap to develop IT capabilities in support of business objectives (10609)

8.1.2 Define the enterprise architecture (10571)
8.1.2.1 Establish the current and future enterprise architecture definition (10611)
8.1.2.2 Confirm enterprise architecture maintenance approach (10612)
8.1.2.3 Maintain the relevance of the enterprise architecture (10613)
8.1.2.4 Act as clearinghouse for IT research and innovation (10614)
8.1.2.5 Govern the enterprise architecture (10615)

8.1.3 Manage the IT portfolio (10572)
8.1.3.1 Establish the IT portfolio (10616)
8.1.3.2 Analyze and evaluate the value of the IT portfolio for the enterprise (10617)
8.1.3.3 Provision resources in accordance with strategic priorities (10618)

8.1.4 Perform IT research and innovation (10573)
8.1.4.1 Research technologies to innovate IT services and solutions (10620)
8.1.4.2 Transition viable technologies for IT services and solutions development (10621)

8.1.5 Evaluate and communicate IT business value and performance (10575)
8.1.5.1 Establish and monitor key performance indicators (10625)
8.1.5.2 Evaluate IT plan performance (10626)
8.1.5.3 Communicate IT value (10627)

8.2 Develop and manage IT customer relationships (10564)

8.2.1 Develop IT services and solutions strategy (10578)
8.2.1.1 Research IT services and solutions to address business and user requirements (11244)
8.2.1.2 Translate business and user requirements into IT services and solutions requirements (11245)
8.2.1.3 Formulate IT services and solutions strategic initiatives (11246)
8.2.1.4 Coordinate strategies with internal stakeholders to ensure alignment (11247)
8.2.1.5 Evaluate and select IT services and solutions strategic initiatives (11248)

8.2.2 Develop and manage IT service levels (10579)
8.2.2.1 Create and maintain the IT services and solutions catalog (10640)
8.2.2.2 Establish and maintain business and IT service-level agreements (10641)
8.2.2.3 Evaluate and report service-level attainment results (10642)
8.2.2.4 Communicate business and IT service-level improvement opportunities (10643)

8.2.3 Perform demand-side management (DSM) for IT services (10580)
8.2.3.1 Analyze IT services and solutions consumption and usage (10644)
8.2.3.2 Develop and implement incentive programs that improve consumption efficiency (10645)
8.2.3.3 Develop volume/unit forecast for IT services and solutions (10646)

8.2.4 Manage IT customer satisfaction (10581)
8.2.4.1 Capture and analyze customer satisfaction (10647)
8.2.4.2 Assess and communicate customer satisfaction patterns (10648)
8.2.4.3 Initiate improvements based on customer satisfaction patterns (10649)

8.2.5 Market IT services and solutions (10582)
8.2.5.1 Develop IT services and solutions marketing strategy (10650)
8.2.5.2 Develop and manage IT customer strategy (10651)
8.2.5.3 Manage IT services and solutions advertising and promotional campaigns (10652)
8.2.5.4 Process and track IT services and solutions orders (10653)

8.3 Develop and implement security, privacy, and data protection controls (11220)
8.3.1 Establish information security, privacy, and data protection strategies and levels (11230)
8.3.2 Test, evaluate, and implement information security and privacy and data protection controls (11231)

8.4 Manage enterprise information (10565)
8.4.1 Develop information and content management strategies (10583)
8.4.1.1 Understand information and content management needs and the role of IT services for executing the business strategy (10654)
8.4.1.2 Assess the information and content management implications of new technologies (10655)
8.4.1.3 Identify and prioritize information and content management actions (10656)
8.4.2 Define the enterprise information architecture (10584)
8.4.2.1 Define information elements, composite structure, logical relationships and constraints, taxonomy, and derivation rules (10657)
8.4.2.2 Define information access requirements (10658)
8.4.2.3 Establish data custodianship (10659)
8.4.2.4 Manage changes to content data architecture requirements (10660)
8.4.3 Manage information resources (10585)
8.4.3.1 Define the enterprise information/data policies and standards (10661)
8.4.3.2 Develop and implement data and content administration (10662)
8.4.4 Perform enterprise data and content management (10586)
8.4.4.1 Define sources and destinations of content data (10663)
8.4.4.2 Manage technical interfaces to users of content (10664)
8.4.4.3 Manage retention, revision, and retirement of enterprise information (10665)
8.5 Develop and maintain information technology solutions (10566)
8.5.1 Develop the IT development strategy (10587)
8.5.1.1 Establish sourcing strategy for IT development (10666)
8.5.1.2 Define development processes, methodologies, and tools standards (10667)
8.5.1.3 Select development methodologies and tools (10668)
8.5.2 Perform IT services and solutions life cycle planning (10588)
8.5.2.1 Plan development of new requirements (10669)
8.5.2.2 Plan development of feature and functionality enhancement (10670)
8.5.2.3 Develop life cycle plan for IT services and solutions (10671)
8.5.3 Develop and maintain IT services and solutions architecture (10589)
8.5.3.1 Create IT services and solutions architecture (10672)
8.5.3.2 Revise IT services and solutions architecture (10673)
8.5.3.3 Retire IT services and solutions architecture (10674)
8.5.4 Create IT services and solutions (10590)
8.5.4.1 Understand confirmed requirements (10675)
8.5.4.2 Design IT services and solutions (10676)
8.5.4.3 Acquire/Develop IT service/solution components (10677)
8.5.4.4 Train services and solutions resources (10678)
8.5.4.5 Test IT services/solutions (10679)
8.5.4.6 Confirm customer acceptance (10680)
8.5.5 Maintain IT services and solutions (10591)
8.5.5.1 Understand upkeep/enhance requirements and defect analysis (10681)
8.5.5.2 Design change to existing IT service/solution (10682)
8.5.5.3 Acquire/Develop changed IT service/solution component (10683)
8.5.5.4 Test IT service/solution change (10684)
8.5.5.5 Retire solutions and services (10685)
8.6 Deploy information technology solutions (10567)
8.6.1 Develop the IT deployment strategy (10592)
8.6.1.1 Establish IT services and solutions change policies (10686)
8.6.1.2 Define deployment process, procedures, and tools standards (10687)
8.6.1.3 Select deployment methodologies and tools (10688)
8.6.2 Plan and implement changes (10593)
8.6.2.1 Plan change deployment (10689)
8.6.2.2 Communicate changes to stakeholders (10690)
8.6.2.3 Administer change schedule (10691)
8.6.2.4 Train impacted users (10692)
8.6.2.5 Distribute and install change (10693)
8.6.2.6 Verify change (10694)
8.6.3 Plan and manage releases (10594)
8.6.3.1 Understand and coordinate release design and acceptance (10695)
8.6.3.2 Plan release rollout (10696)
8.6.3.3 Distribute and install release (10697)
8.6.3.4 Verify release (10698)
8.7 Deliver and support information technology services (10568)
8.7.1 Develop IT services and solution delivery strategy (10595)
8.7.1.1 Establish sourcing strategy for IT delivery (10699)
8.7.1.2 Define delivery processes, procedures, and tools standards (10700)
8.7.1.3 Select delivery methodologies and tools (10701)
8.7.2 Develop IT support strategy (10596)
8.7.2.1 Establish sourcing strategy for IT support (10702)
8.7.2.2 Define IT support services (10703)
8.7.3 Manage IT infrastructure resources (10597)
8.7.3.1 Manage IT inventory and assets (10704)
8.7.3.2 Manage IT resource capacity (10705)
8.7.4 Manage IT infrastructure operations (10598)
  8.7.4.1 Deliver IT services and solutions (10706)
  8.7.4.2 Perform IT operations support services (10707)
8.7.5 Support IT services and solutions (10599)
  8.7.5.1 Manage availability (10708)
  8.7.5.2 Manage facilities (10709)

8.7.5.3 Manage backup/recovery (10710)
  8.7.5.4 Manage performance and capacity (10711)
  8.7.5.5 Manage incidents (10712)
  8.7.5.6 Manage problems (10713)
  8.7.5.7 Manage inquiries (10714)

9.0 Manage Financial Resources (17058)

9.1 Perform planning and management accounting (10728)
  9.1.1 Perform planning/budgeting/forecasting (10738)
    9.1.1.1 Develop and maintain budget policies and procedures (10771)
    9.1.1.2 Prepare periodic budgets and plans (10772)
    9.1.1.3 Operationalize and implement plans to achieve budget (20135)
    9.1.1.4 Prepare periodic financial forecasts (10773)
    9.1.1.5 Perform variance analysis against forecasts and budgets (20136)

  9.1.2 Perform cost accounting and control (10739)
    9.1.2.1 Perform inventory accounting (10774)
    9.1.2.2 Perform profit center accounting (14057)
    9.1.2.3 Perform cost of sales analysis (10775)
    9.1.2.4 Perform product costing (10776)
    9.1.2.5 Perform variance analysis (10777)
    9.1.2.6 Report on profitability (11175)

  9.1.3 Perform cost management (10740)
    9.1.3.1 Determine key cost drivers (10778)
    9.1.3.2 Measure cost drivers (10779)
    9.1.3.3 Determine critical activities (10780)
    9.1.3.4 Manage asset resource deployment and utilization (10781)

  9.1.4 Evaluate and manage financial performance (10741)
    9.1.4.1 Assess customer and product profitability (10782)
    9.1.4.2 Evaluate new products (10783)
    9.1.4.3 Perform life cycle costing (10784)
    9.1.4.4 Optimize customer and product mix (10785)
    9.1.4.5 Track performance of new-customer and product strategies (10786)
    9.1.4.6 Prepare activity-based performance measures (10787)
    9.1.4.7 Manage continuous cost improvement (10788)

9.2 Perform revenue accounting (10729)
  9.2.1 Process customer credit (10742)
    9.2.1.1 Establish credit policies (10789)
    9.2.1.2 Analyze/Approve new account applications (10790)
    9.2.1.3 Analyze credit scoring history (14187)

  9.2.2 Invoice customer (10743)
    9.2.2.1 Maintain customer/product master files (10794)
    9.2.2.2 Generate customer billing data (10795)
    9.2.2.3 Transmit billing data to customers (10796)
    9.2.2.4 Post receivable entries (10797)
    9.2.2.5 Resolve customer billing inquiries (10798)

  9.2.3 Process accounts receivable (AR) (10744)
    9.2.3.1 Establish AR policies (10799)
    9.2.3.2 Receive/Deposit customer payments (10800)
    9.2.3.3 Apply cash remittances (10801)
    9.2.3.4 Prepare AR reports (10802)
    9.2.3.5 Post AR activity to the general ledger (10803)

  9.2.4 Manage and process collections (10745)
    9.2.4.1 Establish policies for delinquent accounts (10804)
    9.2.4.2 Analyze delinquent account balances (10805)
    9.2.4.3 Correspond/Negotiate with delinquent accounts (10806)
    9.2.4.4 Discuss account resolution with internal parties (10807)
    9.2.4.5 Process adjustments/write off balances (10808)
    9.2.4.6 Perform recovery workout (14007)
    9.2.4.7 Manage default accounts (14008)

  9.2.5 Manage and process adjustments/deductions (10746)
    9.2.5.1 Establish policies/procedures for adjustments (10809)
    9.2.5.2 Analyze adjustments (10810)
    9.2.5.3 Correspond/Negotiate with customer (10811)
    9.2.5.4 Discuss resolution with internal parties (10812)
    9.2.5.5 Prepare chargeback invoices (10813)
    9.2.5.6 Process related entries (10814)

9.3 Perform general accounting and reporting (10730)
  9.3.1 Manage policies and procedures (10747)
    9.3.1.1 Negotiate service-level agreements (10815)
    9.3.1.2 Establish accounting policies (10816)
9.3.1.3 Publish accounting policies (20604)
9.3.1.4 Establish common financial systems (10818)

9.3.2 Perform general accounting (10748)
9.3.2.1 Maintain chart of accounts (10819)
9.3.2.2 Process journal entries (10820)
9.3.2.3 Process allocations (10821)
9.3.2.4 Process period end adjustments (10822)
9.3.2.5 Post and reconcile intercompany transactions (10823)
9.3.2.6 Reconcile general ledger accounts (10824)
9.3.2.7 Perform consolidations and process eliminations (10825)
9.3.2.8 Prepare trial balance (10826)
9.3.2.9 Prepare and post management adjustments (10827)

9.3.3 Perform fixed-asset accounting (10749)
9.3.3.1 Establish fixed-asset policies and procedures (10828)
9.3.3.2 Maintain fixed-asset master data files (10829)
9.3.3.3 Process and record fixed-asset additions and retires (10830)
9.3.3.4 Process and record fixed-asset adjustments, enhancements, revaluations, and transfers (10831)
9.3.3.5 Process and record fixed-asset maintenance and repair expenses (10832)
9.3.3.6 Calculate and record depreciation expense (10833)
9.3.3.7 Reconcile fixed-asset ledger (10834)
9.3.3.8 Track fixed-assets including physical inventory (10835)
9.3.3.9 Provide fixed-asset data to support tax, statutory, and regulatory reporting (10836)

9.3.4 Perform financial reporting (10750)
9.3.4.1 Prepare business unit financial statements (10837)
9.3.4.2 Prepare consolidated financial statements (10838)
9.3.4.3 Perform business unit reporting/review management reports (10839)
9.3.4.4 Perform consolidated reporting/review of cost management reports (10840)
9.3.4.5 Prepare statements for board review (10841)
9.3.4.6 Produce quarterly/annual filings and shareholder reports (10842)
9.3.4.7 Produce regulatory reports (10843)
9.3.4.8 Perform legal and management consolidation (14074)

9.4 Manage fixed-asset project accounting (10731)
9.4.1 Perform capital planning and project approval (10751)
9.4.1.1 Develop capital investment policies and procedures (10844)
9.4.1.2 Develop and approve capital expenditure plans and budgets (10845)
9.4.1.3 Review and approve capital projects and fixed-asset acquisitions (10846)
9.4.1.4 Conduct financial justification for project approval (10847)

9.4.2 Perform capital project accounting (10752)
9.4.2.1 Create project account codes (10848)
9.4.2.2 Record project-related transactions (10849)
9.4.2.3 Monitor and track capital projects and budget spending (10850)
9.4.2.4 Close/capitalize projects (10851)
9.4.2.5 Measure financial returns on completed capital projects (10852)

9.5 Process payroll (10732)
9.5.1 Report time (10753)
9.5.1.1 Establish policies and procedures (10853)
9.5.1.2 Collect and record employee time worked (10854)
9.5.1.3 Analyze and report paid and unpaid leave (10855)
9.5.1.4 Monitor regular, overtime, and other hours (10856)
9.5.1.5 Analyze and report employee utilization (10857)
9.5.2 Manage pay (10754)
9.5.2.1 Enter employee time worked into payroll system (10858)
9.5.2.2 Maintain and administer employee earnings information (10859)
9.5.2.3 Maintain and administer applicable deductions (10860)
9.5.2.4 Monitor changes in tax status of employees (10861)
9.5.2.5 Process and distribute payments (10862)
9.5.2.6 Process and distribute manual checks (10863)
9.5.2.7 Process period-end adjustments (10864)
9.5.2.8 Respond to employee payroll inquiries (10865)
9.5.3 Manage and process payroll taxes (10755)
9.5.3.1 Develop tax plan (14075)
9.5.3.2 Manage tax plan (14076)
9.5.3.3 Calculate and pay applicable payroll taxes (10866)
9.5.3.4 Produce and distribute employee annual tax statements (10867)
9.5.3.5 File regulatory payroll tax forms (10868)

9.6 Process accounts payable and expense reimbursements (10733)
9.6.1 Process accounts payable (AP) (10756)
9.6.1.1 Verify AP pay file with purchase order vendor master file (10869)
9.6.1.2 Maintain/Manage electronic commerce (10870)
9.6.1.3 Audit invoices and key data in AP system (10871)
9.6.1.4 Approve payments (10872)
9.6.1.5 Process financial accruals and reversals (10873)
9.6.1.6 Process payroll taxes (10874)
9.6.1.7 Research/Resolve payroll exceptions (10875)
9.6.1.8 Process payments (10876)
9.6.1.9 Respond to AP inquiries (10877)
9.6.1.10 Retain records (10878)
9.6.1.11 Adjust accounting records (10879)
9.6.2 Process expense reimbursements (10757)
9.6.2.1 Establish and communicate expense reimbursement policies and approval limits (10880)
9.6.2.2 Capture and report relevant tax data (10881)
9.6.2.3 Approve reimbursements and advances (10882)
9.6.2.4 Process reimbursements and advances (10883)
9.6.2.5 Manage personal accounts (10884)

9.7 Manage treasury operations (10734)
9.7.1 Manage treasury policies and procedures (10758)
9.7.1.1 Establish scope and governance of treasury operations (10885)
9.7.1.2 Establish and publish treasury policies (10886)
9.7.1.3 Develop treasury procedures (10887)
9.7.1.4 Monitor treasury procedures (10888)
9.7.1.5 Audit treasury procedures (10889)
9.7.1.6 Revise treasury procedures (10890)
9.7.1.7 Develop and confirm internal controls for treasury (10891)
9.7.1.8 Define system security requirements (10892)
9.7.2 Manage cash (10759)
9.7.2.1 Manage and reconcile cash positions (10893)
9.7.2.2 Manage cash equivalents (10894)
9.7.2.3 Process and oversee electronic fund transfers (EFTs) (10895)
9.7.2.4 Develop cash flow forecasts (10896)
9.7.2.5 Manage cash flows (10897)
9.7.2.6 Produce cash management accounting transactions and reports (10898)
9.7.2.7 Manage and oversee banking relationships (10899)
9.7.2.8 Analyze, negotiate, resolve, and confirm bank fees (10900)
9.7.3 Manage in-house bank accounts (10760)
9.7.3.1 Manage in-house bank accounts for subsidiaries (10901)
9.7.3.2 Manage and facilitate inter-company borrowing transactions (10902)
9.7.3.3 Manages centralized outgoing payments on behalf of subsidiaries (10903)
9.7.3.4 Manage central incoming payments on behalf of subsidiaries (10904)
9.7.3.5 Manage internal payments and netting transactions (10905)
9.7.3.6 Calculate interest and fees for in-house bank accounts (10906)
9.7.3.7 Provide account statements for in-house bank accounts (10907)
9.7.4 Manage debt and investment (10761)
9.7.4.1 Establish investment policy (14079)
9.7.4.2 Manage financial intermediary relationships (10908)
9.7.4.3 Manage liquidity (10909)
9.7.4.4 Manage issuer exposure (10910)
9.7.4.5 Process and oversee debt and investment transactions (10911)
9.7.4.6 Process and oversee foreign currency transactions (10912)
9.7.4.7 Produce debt and investment accounting transaction reports (10913)
9.7.4.8 Process and oversee interest rate transactions (14210)
9.7.5 Monitor and execute risk and hedging transactions (11208)
9.7.5.1 Develop risk management/hedging strategy (12974)
9.7.5.2 Manage interest rate risk (11209)
9.7.5.2.1 Manage interest rate market data (19575)
9.7.5.2.2 Determine interest rate exposure for all markets (19576)
9.7.5.2.3 Determine interest rate hedge requirements in accordance with risk policy (19577)
9.7.5.2.4 Execute interest rate trades (19578)
9.7.5.3 Manage foreign exchange risk (11210)
9.7.5.3.1 Manage foreign exchange market data (19579)
9.7.5.3.2 Determine foreign exchange exposure for all currencies (19580)
9.7.5.3.3 Determine foreign exchange hedge requirements in accordance with risk policy (19581)
9.7.5.3.4 Execute foreign exchange trades (19582)
9.7.5.3.5 Manage foreign exchange balance sheet risk (19583)
9.7.5.4 Manage exposure risk (11211)
9.7.5.4.1 Determine current customer exposures and limit exceptions (19584)
9.7.5.4.2 Resolve customer exposure limit violations (19585)
9.7.5.4.3 Manage customer collateral (19586)
9.7.5.4.4 Perform annual customer credit reviews (19587)
9.7.5.5 Execute hedging transactions (20137)
9.7.5.5.1 Measure physical positions (19588)
9.7.5.5.2 Establish hedges (19589)
9.7.5.5.3 Unwind hedges (19590)
9.7.5.5.4 Evaluate and refine hedging positions (11213)
9.7.5.5.5 Monitor credit (11215)
9.7.5.6 Produce hedge accounting transactions and reports (11214)
9.7.6 Manage financial fraud/dispute cases (16958)

9.8 Manage internal controls (10735)
9.8.1 Establish internal controls, policies, and procedures (10762)
9.8.1.1 Establish board of directors and audit committee (10914)
9.8.1.2 Define and communicate code of ethics (10915)
9.8.1.3 Assign roles and responsibility for internal controls (10916)
9.8.1.4 Define business process objectives and risks (11250)
9.8.1.5 Define entity/unit risk tolerances (11251)
9.8.2 Operate controls and monitor compliance with internal controls policies and procedures (10763)
9.8.2.1 Design and implement control activities (10917)
9.8.2.2 Monitor control effectiveness (10918)
9.8.2.3 Remediate control deficiencies (10919)
9.8.2.4 Create compliance function (10920)
9.8.2.5 Operate compliance function (10921)
9.8.2.6 Implement and maintain controls-related enabling technologies and tools (10922)
9.8.3 Report on internal controls compliance (10764)
9.8.3.1 Report to external auditors (10923)
9.8.3.2 Report to regulators, share/debt-holders, securities exchanges, etc. (10924)
9.8.3.3 Report to third parties (10925)

9.8.3.4 Report to internal management (10926)

9.9 Manage taxes (10736)
9.9.1 Develop tax strategy and plan (10765)
9.9.1.1 Develop foreign, national, state, and local tax strategy (10927)
9.9.1.2 Consolidate and optimize total tax plan (10928)
9.9.1.3 Maintain tax master data (10929)
9.9.2 Process taxes (10766)
9.9.2.1 Perform tax planning/strategy (10930)
9.9.2.2 Prepare returns (10931)
9.9.2.3 Prepare foreign taxes (10932)
9.9.2.4 Calculate deferred taxes (10933)
9.9.2.5 Account for taxes (10934)
9.9.2.6 Monitor tax compliance (10935)
9.9.2.7 Address tax inquiries (10936)

9.10 Manage international funds/consolidation (10737)
9.10.1 Monitor international rates (10767)
9.10.2 Manage transactions (10768)
9.10.3 Monitor currency exposure/hedge currency (10769)
9.10.4 Report results (10770)

9.11 Perform global trade services (17059)
9.11.1 Screen sanctioned party list (14090)
9.11.2 Control exports and imports (14091)
9.11.3 Classify products (14092)
9.11.4 Perform currency conversion (19593)
9.11.5 Calculate duty (14093)
9.11.6 Communicate with customs (14094)
9.11.7 Document trade (14095)
9.11.8 Process trade preferences (14096)
9.11.9 Handle restitution (14097)
9.11.10 Prepare letter of credit (14098)

10.0 Acquire, Construct, and Manage Assets (19207)

10.1 Plan and acquire assets (10937)
10.1.1 Develop property strategy and long term vision (10941)
10.1.1.1 Confirm alignment of property requirements with business strategy (10955)
10.1.1.2 Appraise the external environment (10956)
10.1.1.3 Determine build or buy decision (10957)
10.1.2 Plan facility (10943)
10.1.2.1 Design facility (10958)
10.1.2.2 Analyze budget (10959)
10.1.2.3 Select property (10960)
10.1.2.4 Negotiate terms for facility (10961)
10.1.2.5 Manage construction or modification to building (10962)
10.1.3 Provide workspace and facilities (10944)
10.1.3.1 Acquire workspace and facilities (10963)
10.1.3.2 Change fit/form/function of workspace and facilities (10964)
10.1.4 Manage facilities operations (10949)
10.1.4.1 Relocate people (10965)
10.1.4.2 Relocate material and tools (10966)

10.2 Design and construct productive assets (19208)
10.2.1 Manage capital program for productive assets (19209)
10.2.1.1 Define capital investment plan (19210)
10.2.1.2 Monitor capital program (19211)
10.2.1.3 Secure construction financing (19212)
10.2.2 Design and plan asset construction (20139)
11.0 Manage Enterprise Risk, Compliance, Remediation, and Resiliency (16437)

11.1 Manage enterprise risk (17060)

11.1.1 Establish the enterprise risk framework and policies (16439)
  11.1.1.1 Determine risk tolerance for organization (16440)
  11.1.1.2 Develop and maintain enterprise risk policies and procedures (16441)
  11.1.1.3 Identify and implement enterprise risk management tools (16442)
  11.1.1.4 Coordinate the sharing of risk knowledge across the organization (16443)
  11.1.1.5 Prepare and report enterprise risk to executive management and board (16444)

11.1.2 Oversee and coordinate enterprise risk management activities (16445)
  11.1.2.1 Identify enterprise level risks (16446)
  11.1.2.2 Assess risks to determine which to mitigate (16447)

11.1.3 Manage business unit and function risk (17462)
  11.1.3.1 Identify risks (16456)
  11.1.3.2 Assess risks using enterprise risk framework policies and procedures (16457)

11.1.4 Develop risk mitigation and management strategy and integrate with existing performance management processes (16448)

11.1.5 Verify business unit and functional risk mitigation plans are implemented (16449)

11.1.6 Ensure risks and risk mitigation actions are monitored (16450)

11.1.7 Report on enterprise risk activities (16451)

11.1.8 Coordinate business unit and functional risk management activities (16452)

11.1.9 Ensure that each business unit/function follows the enterprise risk management process (16453)

11.1.10 Ensure that each business unit/function follows the enterprise risk reporting process (16454)

11.2 Maintain productive assets (19238)

10.3 Plan asset maintenance (19239)
  10.3.1 Develop maintenance strategies (19240)
  10.3.2 Analyze assets and predict maintenance requirements (10967)
  10.3.3 Specify maintenance policies (19241)
  10.3.4 Integrate preventive maintenance into operations schedule (10968)
  10.3.5 Identify work management tasks & priorities (19242)

10.3.6 Conduct resource planning (19243)

10.3.7 Create work plans (19244)

10.3.8 Manage asset maintenance (19245)
  10.3.8.1 Schedule maintenance work (19246)
  10.3.8.2 Obtain required resources (19247)
  10.3.8.3 Undertake quality control (19248)
  10.3.8.4 Update work and asset records (19249)
  10.3.8.5 Manage maintenance work safety (19250)
  10.3.8.6 Define maintenance performance targets (19251)
  10.3.8.7 Monitor maintenance performance against targets/contracts (19252)

10.3.9 Perform asset maintenance (19253)
  10.3.9.1 Perform preventative asset maintenance (10947)
  10.3.9.2 Perform routine asset maintenance (19254)
  10.3.9.3 Perform corrective asset maintenance and repairs (19255)
  10.3.9.4 Identify unplanned maintenance requirements (19256)
  10.3.9.5 Perform unplanned maintenance and repairs (19257)

10.4 Dispose of assets (10940)

10.4.1 Develop exit strategy (10952)

10.4.2 Decommission productive assets (19258)

10.4.3 Perform sale or trade (10953)

10.4.4 Perform abandonment (10954)

10.4.5 Perform waste and hazardous goods management (16970)
12.0 Manage External Relationships (10012)

12.1 Build investor relationships (11010)
- 12.1.1 Plan, build, and manage lender relations (11035)
- 12.1.2 Plan, build, and manage analyst relations (11036)
- 12.1.3 Communicate with shareholders (11037)

12.2 Manage government and industry relationships (11011)
- 12.2.1 Manage government relations (11038)
  - 12.2.1.1 Assess relationships (12869)
  - 12.2.1.2 Appoint responsible executives (12870)
  - 12.2.1.3 Monitor relationships (12871)
  - 12.2.1.4 Receive input from internal advisors (12872)
  - 12.2.1.5 Receive input from external advisors (12873)
  - 12.2.1.6 Liaise with authorities (12874)
- 12.2.2 Manage relations with quasi-government bodies (11039)
  - 12.2.2.1 Establish relationships with agencies (12875)
  - 12.2.2.2 Respond to audit inquiries (12876)
  - 12.2.2.3 Maintain documentation of contacts (12877)
  - 12.2.2.4 Plan and manage meetings (12878)
- 12.2.3 Manage relations with trade or industry groups (11040)
  - 12.2.3.1 Evaluate the requirements for strategic relationships (12879)
  - 12.2.3.2 Monitor the success of the partnerships (12880)

12.3 Manage relations with board of directors (11012)
- 12.3.1 Report financial results (11042)
- 12.3.2 Report audit findings (11043)

12.4 Manage legal and ethical issues (11013)
- 12.4.1 Create ethics policies (11044)
- 12.4.2 Manage corporate governance policies (11045)
- 12.4.3 Develop and perform preventive law programs (11046)
- 12.4.4 Ensure compliance (11047)
  - 12.4.4.1 Plan and initiate compliance program (11053)
  - 12.4.4.2 Execute compliance program (11054)
- 12.4.5 Manage outside counsel (11048)
  - 12.4.5.1 Assess problem and determine work requirements (11056)
  - 12.4.5.2 Engage/Retain outside counsel if necessary (11057)
  - 12.4.5.3 Receive strategy/budget (11058)
  - 12.4.5.4 Receive work product and manage/monitor case and work performed (11059)
  - 12.4.5.5 Process payment for legal services (11060)

12.2 Manage compliance (17467)
- 12.2.1 Establish compliance framework and policies (17468)
  - 12.2.1.1 Develop enterprise compliance policies and procedures (17469)
  - 12.2.1.2 Implement enterprise compliance activities (17470)
  - 12.2.1.3 Manage internal audits (14133)
  - 12.2.1.4 Maintain controls-related technologies and tools (14137)
- 12.2.2 Manage regulatory compliance (16463)
  - 12.2.2.1 Develop regulatory compliance procedures (16464)
  - 12.2.2.2 Identify applicable regulatory requirements (16465)
  - 12.2.2.3 Monitor the regulatory environment for changing or emerging regulations (16466)
  - 12.2.2.4 Assess current compliance position and identify weaknesses or shortfalls therein (16467)
- 11.1.3.3 Develop mitigation plans for risks (16458)
  - 11.1.3.3.1 Assess adequacy of insurance cover (18129)
- 11.1.3.4 Implement mitigation plans for risks (16459)
- 11.1.3.5 Monitor risks (16460)
- 11.1.3.6 Analyze risk activities and update plans (16461)
- 11.1.3.7 Report on risk activities (16462)

11.2.2.5 Implement missing or stronger regulatory compliance controls and policies (16468)
- 11.2.2.6 Monitor and test regulatory compliance position and existing controls (16469)
- 11.2.2.7 Compile and communicate compliance scorecard(s) (19595)
- 11.2.2.8 Compile and communicate internal and regulatory compliance reports (19596)
- 11.2.2.9 Maintain relationships with regulators as appropriate (16470)

11.3 Manage remediation efforts (11185)
- 11.3.1 Create remediation plans (11201)
- 11.3.2 Contact and confer with experts (11202)
- 11.3.3 Identify/dedicate resources (11203)
- 11.3.4 Investigate legal aspects (11204)
- 11.3.5 Investigate damage cause (11205)
- 11.3.6 Amend or create policy (11206)

11.4 Manage business resiliency (11216)
- 11.4.1 Develop the business resilience strategy (11221)
- 11.4.2 Perform continuous business operations planning (11222)
- 11.4.3 Test continuous business operations (11223)
- 11.4.4 Maintain continuous business operations (11224)
- 11.4.5 Share knowledge of specific risks across other parts of the organization (16471)
12.4.5.6 Track legal activity/performance (11061)
12.4.6 Protect intellectual property (11049)
  12.4.6.1 Manage copyrights, patents, and trademarks (11062)
  12.4.6.2 Maintain intellectual property rights and restrictions (11063)
  12.4.6.3 Administer licensing terms (11064)
  12.4.6.4 Administer options (11065)
12.4.7 Resolve disputes and litigations (11050)
12.4.8 Provide legal advice/counseling (11051)
12.4.9 Negotiate and document agreements/contracts (11052)

12.5 Manage public relations program (11014)
  12.5.1 Manage community relations (11066)
  12.5.2 Manage media relations (11067)
  12.5.3 Promote political stability (11068)
  12.5.4 Create press releases (11069)
  12.5.5 Issue press releases (11070)

13.0 Develop and Manage Business Capabilities (10013)

13.1 Manage business processes (16378)
  13.1.1 Establish and maintain process management governance (16379)
    13.1.1.1 Define and manage governance approach (16380)
    13.1.1.2 Establish and maintain process tools and templates (16381)
    13.1.1.3 Assign and support process ownership (16382)
    13.1.1.4 Perform process governance activities (16383)
  13.1.2 Define and manage process frameworks (16384)
    13.1.2.1 Establish and maintain process framework (16385)
    13.1.2.2 Identify cross-functional processes (16386)
  13.1.3 Define processes (16387)
    13.1.3.1 Scope processes (16388)
    13.1.3.2 Analyze processes (16389)
      13.1.3.2.1 Identify published best practices (20140)
    13.1.3.3 Model and document processes (16390)
    13.1.3.4 Publish processes (16391)
  13.1.4 Manage process performance (16392)
    13.1.4.1 Provide process training (16393)
    13.1.4.2 Support process execution (16394)
    13.1.4.3 Measure and report process performance (16395)
      13.1.4.3.1 Identify additional metrics as required (20141)
  13.1.5 Improve processes (16396)
    13.1.5.1 Identify and select improvement opportunities (16397)
    13.1.5.2 Manage improvement projects (16398)
    13.1.5.3 Perform continuous improvement activities (16399)

13.2 Manage portfolio, program, and project (16400)
  13.2.1 Manage portfolio (16401)
    13.2.1.1 Establish portfolio strategy (16402)
    13.2.1.2 Define portfolio governance (16403)
  13.2.2 Manage programs (16405)
    13.2.2.1 Establish program structure and approach (16406)
    13.2.2.2 Manage program stakeholders and partners (16407)
    13.2.2.3 Manage program execution (16408)
    13.2.2.4 Review and report program performance (16409)
  13.2.3 Manage projects (16410)
    13.2.3.1 Establish project scope (16411)
      13.2.3.1.1 Identify project requirements and objectives (11117)
      13.2.3.1.2 Identify project resource requirements (16412)
      13.2.3.1.3 Assess culture and readiness for project management approach (11118)
      13.2.3.1.4 Identify appropriate project management methodologies (11119)
      13.2.3.1.5 Create business case and obtain funding (11120)
      13.2.3.1.6 Develop project measures and indicators (11121)
    13.2.3.2 Develop project plans (16413)
      13.2.3.2.1 Define roles and resources (11123)
      13.2.3.2.2 Acquire/secure project resources (20142)
      13.2.3.2.3 Identify specific IT requirements (11124)
      13.2.3.2.4 Create training and communication plans (11125)
      13.2.3.2.5 Design recognition and reward approaches (11127)
      13.2.3.2.6 Design and plan launch of project (11128)
      13.2.3.2.7 Deploy the project (11129)
    13.2.3.3 Execute projects (16414)
      13.2.3.3.1 Evaluate impact of project
13.2.3.2 Report the status of project (16415)
13.2.3.3 Manage project scope (16416)
13.2.3.4 Promote and sustain activity and involvement (11132)
13.2.3.5 Realign and refresh project management strategy and approaches (11133)
13.2.3.6 Review and report project performance (16417)
13.2.3.7 Close projects (16418)

13.3 Manage enterprise quality (17471)

13.3.1 Establish quality requirements (17472)
13.3.1.1 Define critical-to-quality characteristics (17473)
13.3.1.2 Define preventive quality activities (17474)
13.3.1.3 Develop quality controls (17475)
   13.3.1.3.1 Define process steps for controls (or integration points) (17476)
   13.3.1.3.2 Define sampling plan (17477)
   13.3.1.3.3 Identify measurement methods (17478)
   13.3.1.3.4 Define required competencies (17479)
13.3.1.4 Prove capability to assess compliance with requirements (17480)
13.3.1.5 Finalize quality plan (17481)

13.3.2 Evaluate performance to requirements (17482)
13.3.2.1 Test against quality plan (17483)
   13.3.2.1.1 Conduct test and collect data (17484)
   13.3.2.1.2 Record result(s) (17485)
   13.3.2.1.3 Determine disposition of result(s) (17486)
13.3.2.2 Assess results of tests (17487)
   13.3.2.2.1 Assess sample significance (17488)
   13.3.2.2.2 Summarize result(s) (17489)
   13.3.2.2.3 Recommend actions (17490)
13.3.3 Manage non-conformance (17492)
   13.3.3.1 Assess potential impact (17493)
   13.3.3.2 Determine immediate action(s) (17494)
   13.3.3.3 Identify root cause(s) (17495)
   13.3.3.4 Take corrective or preventative action (17496)
   13.3.3.5 Close non-conformance (17497)

13.3.4 Implement and maintain the enterprise quality management system (EQMS) (17498)
   13.3.4.1 Define the quality strategy (17499)
   13.3.4.2 Plan and deploy the EQMS scope, targets, and goals (17500)
   13.3.4.3 Identify core EQMS processes, controls, and metrics (17501)
   13.3.4.4 Develop and document EQMS policies, procedures, standards, and measures (17502)

13.4 Manage change (11074)

13.4.1 Plan for change (11134)
   13.4.1.1 Select process improvement methodology (11138)
   13.4.1.2 Determine stakeholders (11140)
   13.4.1.3 Assess readiness for change (11139)
   13.4.1.4 Identify change champion(s) (11141)
   13.4.1.5 Form design team (11142)
   13.4.1.6 Define scope (11143)
   13.4.1.7 Understand current state (11144)
   13.4.1.8 Define future state (11145)
   13.4.1.9 Conduct organizational risk analysis (11146)
   13.4.1.10 Assess cultural issues (11147)
   13.4.1.11 Identify impacted groups (20143)
   13.4.1.12 Determine degree/extent of impact (20144)
   13.4.1.13 Establish accountability for change management (11148)
   13.4.1.14 Identify barriers to change (11149)
   13.4.1.15 Determine change enablers (11150)
   13.4.1.16 Identify resources and develop measures (11151)

13.4.2 Design the change (11135)
   13.4.2.1 Assess connection to other initiatives (11152)
   13.4.2.2 Develop change management plans (11153)
   13.4.2.3 Develop training plan (11154)
   13.4.2.4 Develop communication plan (11155)
   13.4.2.5 Assign change champion(s) (20145)
   13.4.2.6 Develop rewards/incentives plan (11156)
   13.4.2.7 Establish change adoption metrics (11157)
   13.4.2.8 Establish/Clarify new roles (11158)
   13.4.2.9 Identify budget/roles (11159)

13.4.3 Implement change (11136)
   13.4.3.1 Create commitment for improvement/change (11160)
   13.4.3.2 Reengineer business processes and systems (11161)
13.4.3.3 Support transition to new roles or exit strategies for incumbents (11162)
13.4.3.4 Monitor change (11163)
13.4.3.5 Report on change (20146)
13.4.4 Sustain improvement (11137)
  13.4.4.1 Monitor improved process performance (11164)
  13.4.4.2 Capture and reuse lessons learned from change process (11165)
  13.4.4.3 Take corrective action as necessary (11166)

13.5 Develop and manage enterprise-wide knowledge management (KM) capability (11073)
  13.5.1 Develop KM strategy (11095)
    13.5.1.1 Develop governance model (11100)
    13.5.1.2 Establish central KM core group (11101)
    13.5.1.3 Define roles and accountability of core group versus operating units (11102)
    13.5.1.4 Develop funding models (11103)
    13.5.1.5 Identify links to key initiatives (11104)
    13.5.1.6 Develop core KM methodologies (11105)
    13.5.1.7 Assess IT needs and engage IT function (11106)
    13.5.1.8 Develop training and communication plans (11107)
    13.5.1.9 Develop change management approaches (11108)
    13.5.1.10 Develop strategic measures and indicators (11109)
  13.5.2 Assess KM capabilities (11096)
    13.5.2.1 Assess maturity of existing KM initiatives (11110)
    13.5.2.2 Evaluate existing KM approaches (11111)
    13.5.2.3 Identify gaps and needs (11112)
    13.5.2.4 Enhance/Modify existing KM approaches (11113)
    13.5.2.5 Develop new KM approaches (11114)
    13.5.2.6 Implement new KM approaches (11115)

13.6 Measure and benchmark (16436)
  13.6.1 Create and manage organizational performance strategy (11071)
    13.6.1.1 Create enterprise measurement systems model (11075)
    13.6.1.2 Measure process productivity (11076)
    13.6.1.3 Measure cost effectiveness (11077)
    13.6.1.4 Measure staff efficiency (11078)
  13.6.2 Benchmark performance (11072)
    13.6.2.1 Conduct performance assessments (11083)
    13.6.2.2 Develop benchmarking capabilities (11084)
    13.6.2.3 Conduct internal process and external competitive benchmarking (11085)
    13.6.2.4 Conduct gap analysis (11087)
    13.6.2.5 Establish need for change (11088)
  13.6.3 Evaluate process performance (20147)
    13.6.3.1 Establish appropriate performance indicators (metrics) (10270)
    13.6.3.2 Establish monitoring frequency (10271)
    13.6.3.3 Collect data (20148)
    13.6.3.4 Calculate performance measures (10272)
    13.6.3.5 Identify performance trends (10273)
    13.6.3.6 Analyze performance against benchmark data (10274)
    13.6.3.7 Prepare reports (10275)
    13.6.3.8 Develop performance improvement plan (10276)

13.7 Manage environmental health and safety (EHS) (11179)
  13.7.1 Determine environmental health and safety impacts (11180)
    13.7.1.1 Evaluate environmental impact of products, services, and operations (11186)
    13.7.1.2 Conduct health and safety and environmental audits (11187)
  13.7.2 Develop and execute functional EHS program (11181)
    13.7.2.1 Identify regulatory and stakeholder requirements (11188)
    13.7.2.2 Assess future risks and opportunities (11189)
    13.7.2.3 Create EHS policy (11190)
    13.7.2.4 Record and manage EHS events (11191)
  13.7.3 Train and educate functional employees (11182)
    13.7.3.1 Communicate EHS issues to stakeholders and provide support (11192)
  13.7.4 Monitor and manage functional EHS management program (11183)
    13.7.4.1 Manage EHS costs and benefits (11193)
    13.7.4.2 Measure and report EHS performance (11194)
    13.7.4.3 Implement emergency response program (11196)
    13.7.4.4 Implement pollution prevention program (11197)
    13.7.4.5 Provide employees with EHS support (11195)