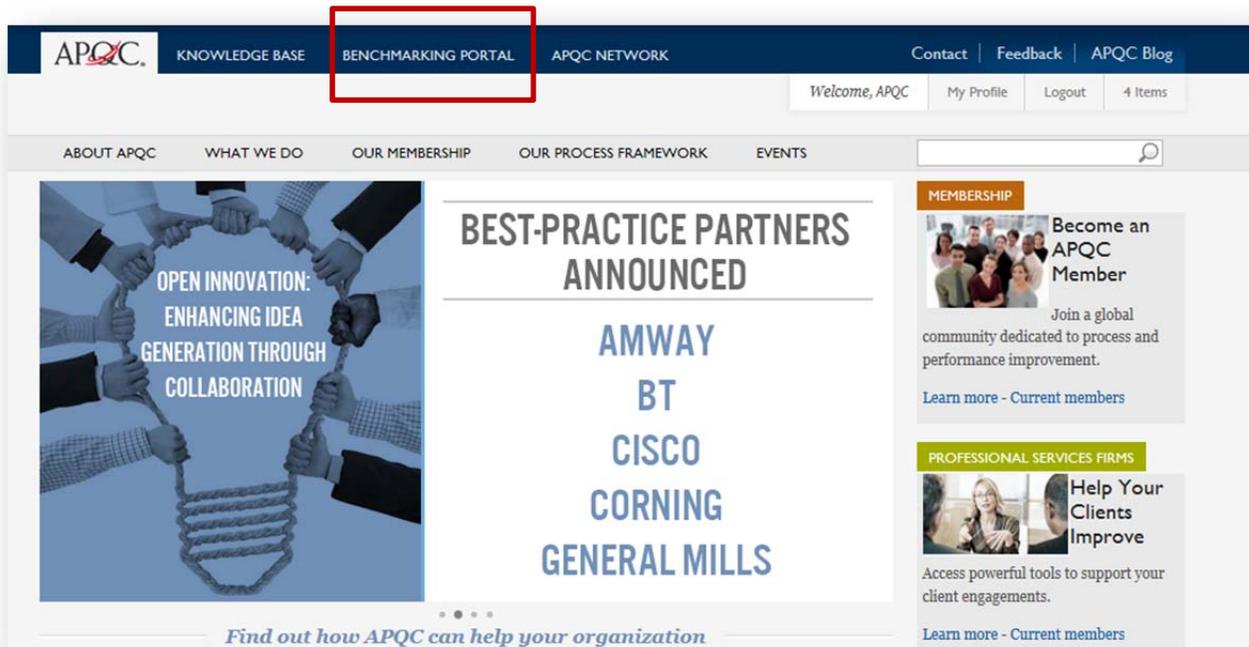


APQC's Benchmarking Portal: A User's Guide for Industry Members

Getting started

APQC members must be registered with APQC and logged into the website to access the tools in the Benchmarking Portal. To create an account, visit www.apqc.org/register.

Once logged in, you can find the Portal from the APQC homepage or go to www.apqc.org/bp.



Choose the right tool

From the Portal landing page, you have three options.

The screenshot shows the APQC Benchmarking Portal landing page. The navigation bar includes 'APQC', 'KNOWLEDGE BASE', 'BENCHMARKING PORTAL', and 'APQC NETWORK'. A user is logged in as 'Christine'. The main content area has a green banner with the text 'Welcome to the APQC Benchmarking Portal' and 'The single destination to manage all of your benchmarking activities.' Below this is a 'Ready to start?' section with three numbered options: 1. BENCHMARKS ON DEMAND, 2. RAPID PERFORMANCE ASSESSMENT, and 3. OPEN STANDARDS BENCHMARKING. A red box highlights the 'Learn more about the portal >>' link in the 'First time here?' sidebar.

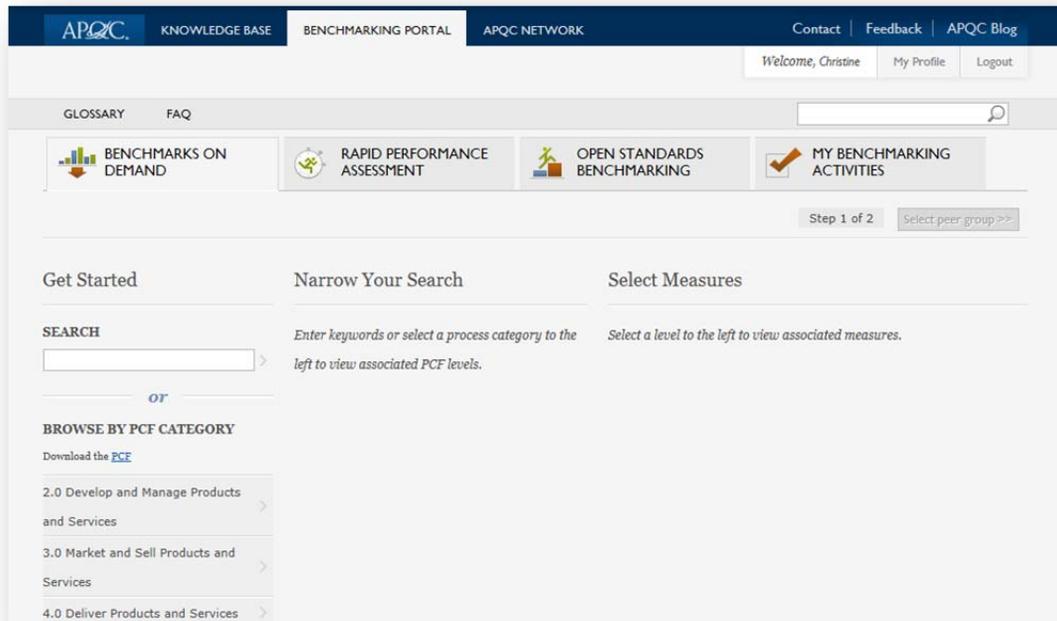
To help you choose the right tool, visit the Learn More page for descriptions, levels of effort, turnaround times, and outputs for each.

Please note: The Benchmark on Demand tool is not available to Professional Service/Consulting firm members. For access to benchmarks and data, please contact Cathy Hill at chill@apqc.org or +1-713-685-4652. The data provided by the Benchmark on Demand tool is intended to support the understanding, assessment, measurement, and change of internal processes within your organization. You may only use the data on an individual, limited, non-commercial, and personal basis. Any sharing of this data outside of your organization is prohibited and will be in violation of these terms. If you plan on using the data for anything other than internal process management and improvement, please contact Cathy Hill for licensing options.

Benchmarks on Demand

There are two options for accessing metrics, you can either search by keyword(s) or browse. The two are mutually exclusive, you cannot do a search and then browse within the results and vice versa.

KEYWORD SEARCH



1. Enter your search terms. For this search, the fewer, more simple words the better.
2. Once your search is submitted, a list of the PCF levels that contain measures relevant to your search will appear in the middle column. Choose a level from the list to view the relevant measures, which will be displayed in the right hand column.
3. Results here will contain measures whose descriptions include an exact match to the text you entered into the search field. For example, entering "transaction" will return measures like, *Percentage of the total value of purchases placed by non-traditional submission methods (without a buyer or purchasing agent being involved to process the transaction)*. To find measures related to a particular category, process, or activity, please use the browse feature.
4. Select any of the measures you're interested in by clicking on the box to the left of each measure, or you can Select All.
5. To continue searching for more measures, simply choose a different category from the middle column to view the relevant measures and select any of interest. Repeat this process until you have selected everything you're interested in. You may view all of the selected measures, and update your list, by clicking on the **View selected measures** button on the left.
6. Once you are satisfied with your list of measures, click the **Select peer group >>** button located in the top right corner of the screen.

BROWSE

1. To browse available measures, start by choosing a process category from the list in the left hand column.

The screenshot displays the APQC Benchmarking Portal interface. At the top, there is a navigation bar with 'APQC', 'KNOWLEDGE BASE', 'BENCHMARKING PORTAL', and 'APQC NETWORK'. On the right, there are links for 'Contact', 'Feedback', and 'APQC Blog', along with a user profile section for 'Christine' with 'My Profile' and 'Logout' options. Below the navigation bar, there are tabs for 'GLOSSARY' and 'FAQ', and a search bar. The main content area features four primary categories: 'BENCHMARKS ON DEMAND', 'RAPID PERFORMANCE ASSESSMENT', 'OPEN STANDARDS BENCHMARKING', and 'MY BENCHMARKING ACTIVITIES'. A 'Step 1 of 2' indicator and a 'Select peer group >>' button are visible. The interface is divided into three columns: 'Get Started', 'Narrow Your Search', and 'Select Measures'. The 'Get Started' column contains a 'SEARCH' section with a search box. The 'Narrow Your Search' column prompts users to 'Enter keywords or select a process category to the left to view associated PCF levels.' The 'Select Measures' column prompts users to 'Select a level to the left to view associated measures.' A red box highlights the 'BROWSE BY PCF CATEGORY' section, which includes a link to 'Download the PCF' and a list of PCF levels: '2.0 Develop and Manage Products and Services', '3.0 Market and Sell Products and Services', and '4.0 Deliver Products and Services'.

2. PCF levels where measures are available will appear in the middle column. Choose a level from the list to view the included measures, which will be displayed in the far right column.
3. Select any of the measures you're interested in by clicking on the box to the left of each measure, or you can Select All.
4. To continue searching for more measures, simply choose a different category from the middle column to view the relevant measures and select any of interest. Repeat this process until you have selected everything you're interested in. You may view all of the selected measures, and update your list, by clicking on the **View selected measures** button on the left.
5. Once you are satisfied with your list of measures, click the **Select peer group >>** button located in the top right corner of the screen.

NAME THE ACTIVITY AND SELECT PEER GROUPS

The screenshot shows the APQC Benchmarking Portal interface. At the top, there is a navigation bar with 'APQC', 'KNOWLEDGE BASE', 'BENCHMARKING PORTAL', and 'APQC NETWORK'. On the right, there are links for 'Contact', 'Feedback', and 'APQC Blog'. Below this, a user is logged in as 'Christine', with links for 'My Profile', 'Logout', and '1 Item'. A search bar is located on the right. Below the search bar, there are four main menu items: 'BENCHMARKS ON DEMAND', 'RAPID PERFORMANCE ASSESSMENT', 'OPEN STANDARDS BENCHMARKING', and 'MY BENCHMARKING ACTIVITIES'. The 'MY BENCHMARKING ACTIVITIES' tab is active. Below the menu, there are navigation buttons: '<< Select measures', 'Step 2 of 2', and 'View report >>'. The main content area is titled 'Name this Benchmarking Activity: *' and contains a text input field. Below the input field, there is a note: 'Give this activity a name that relates to the information in your report. Once you submit your report request, this report will be stored in "My Benchmarking Activities" for future viewing.' Below the note, there are three dropdown menus: 'Industry:' (set to '-All-'), 'Region:' (set to '-All-'), and 'Revenue:' (set to '-All-'). Below the dropdowns, there is a note: 'Use these fields to get additional data matching the filters you selected. For example, if you pick "North America" in the "Region" field, you'll get another column of benchmarking data showing data from organizations in North America only. You'll always get a set of data for "All companies" in our database, no matter what you pick here.'

1. The set of measures you selected will be stored for future refreshes of the data output under the My Benchmarking Activities tab. Name your benchmarking activity something that relates to what you've selected so you can access it later.
2. Three options for peer group cuts are available: industry, region, and revenue. Please note that only options which can report out data are available (those with a sample size >6). Your report will contain one column for each group selected plus a column for all companies. For example if you choose Industry = Aerospace and Region = Europe, Middle East, and Asia, you will receive a report with three columns for each measure: one for Aerospace, one for Europe, Middle East, and Asia, and one for All Companies.
Your selections run on the "or" function, not "and". This means that your report contains data for all companies that are Aerospace OR Europe, Middle East, and Africa. Not all companies that are in the Aerospace industry AND in the Europe, Middle East, and Africa region.
3. Once you are satisfied with your selection, click [View report >>](#).
4. You may download a copy of the report by clicking on the PDF link, and/or copy and paste all of the report contents into Excel.

REFRESH YOUR REPORT

Once you've run your report, it will be available for future data refreshes in My Benchmarking Activities. Come back next week or three months from now, select Re-run, and your report will be produced with updated data.

Rapid Performance Assessments

Rapid Performance Assessments are high-level assessments that include KPI's meant to give you a broad assessment of a particular process category's health. Each assessment consists of between 15-25 questions and reports out on 10-20 measures. Pending validation, reports will be provided within about 2 business days.

SELECT YOUR ASSESSMENT

The screenshot shows the APQC Benchmarking Portal interface. The top navigation bar includes 'APQC', 'KNOWLEDGE BASE', 'BENCHMARKING PORTAL', and 'APQC NETWORK'. There are links for 'Contact', 'Feedback', and 'APQC Blog'. A user is logged in as 'Christine', with options for 'My Profile', 'Logout', and 'Item'. Below the navigation bar, there are tabs for 'LEARN MORE', 'GLOSSARY', and 'FAQ'. A search bar is present. The main content area features four primary navigation buttons: 'BENCHMARKS ON DEMAND', 'RAPID PERFORMANCE ASSESSMENT' (which is highlighted), 'OPEN STANDARDS BENCHMARKING', and 'MY BENCHMARKING ACTIVITIES'. A progress indicator shows 'Step 1 of 2' and a button labeled 'About Your Organization >>'. The 'RAPID PERFORMANCE ASSESSMENT' section is expanded, showing three columns: 'Browse by PCF Category', 'Select Assessment', and 'Included Measures'. Under 'Browse by PCF Category', '8.0 Manage Financial Resources' is selected. The 'Select Assessment' list includes 'General Accounting and Reporting', which is highlighted. The 'Included Measures' list contains ten items related to financial reporting cycle times and manual journal entry.

1. Select the PCF category for an assessment you'd like to complete. PCF categories map to APQC's functional areas:
 - a. Financial Management: 8.0 Manage Financial Resources
 - b. Human Capital Management: 6.0 Develop and Manage Human Capital
 - c. Information Technology: 7.0 Manage Information Technology
 - d. Supply Chain Management: 2.0 Develop and Manage Products and Services; 4.0 Deliver Products and Services
2. The list of available assessments appears next. Select an assessment within this list to view the measures included in its report. You can view the measures for any assessment you select.
3. Once you find the assessment you would like to complete, click [About Your Organization >>](#) to continue.

PROVIDE INFORMATION ABOUT YOUR ORGANIZATION

So that your organization's data can be validated and compared against peer groups, we need to now just a few pieces of information about your organization.

1. Organization being assessed: Here, please provide the name of the company and business unit or part of the company that you will be providing information for in this assessment. For example, if you have selected the Payroll assessment and will be providing data from your company's Finance organization, you may want to input: "MyCompany finance function North America"
2. Activity name: the purpose of this field is so that you can provide a name for this benchmarking activity that you will be able to remember and find at a future date. The activity name will be how you view the status of your assessment and retrieve the report from the "My Benchmarking Activities" section of the Benchmarking Portal.
3. Country and NAICS code: These two fields help us provide peer groups in your report.
4. That is all the information we need to collect from you before you start the assessment. If you would like to see the exact questions asked in the assessment, click the link to the additional assessment tools in the box on the right and choose the tool listed under the assessment you are about to complete. Then, simply click [Take assessment >>](#) to begin your assessment.

COMPLETING THE ASSESSMENT

Should you need to stop in the middle of the assessment for any reason, just click "Save". You will be able to continue the assessment at a later date by visiting My Benchmarking Activities within the Benchmarking Portal.

If you have any questions or would like to request assistance in completing the assessment, please contact the Open Standards Benchmarking Help Desk at osb@apqc.org.

Once you've completed the assessment, APQC's team of data analysts will review and validate your responses. If they have any question, they will contact you for clarification. Once your responses have been validated, you will receive your report within 2 business days. You can monitor the status of your assessment and report in the My Benchmarking Activities section of the Benchmarking Portal.

The screenshot shows the APQC Benchmarking Portal interface. At the top, there is a dark blue navigation bar with the APQC logo and links for Knowledge Base, Benchmarking Portal, and APQC Network. On the right side of this bar are links for Contact, Feedback, and APQC Blog. Below this is a user profile section with the text "Welcome, Christine" and buttons for My Profile, Logout, and I Item. A secondary navigation bar contains links for Learn More, Glossary, and FAQ, along with a search box. Below this are four main assessment categories: Benchmarks on Demand, Rapid Performance Assessment, Open Standards Benchmarking, and My Benchmarking Activities (which is highlighted with a checkmark). Under My Benchmarking Activities, there are two tabs: My Benchmark Reports and My Assessments. The My Assessments tab is active, displaying a table with the following data:

Activity name	APQC name	Survey type	Date started	Survey status	Action
Sample Assessment	Internal Controls	Rapid Performance Assessment	Tue, 04/23/2013 - 4:22pm	Active	Continue

Open Standards Benchmarking Assessments

Open Standards Benchmarking assessments are more detailed than Rapid Performance Assessments, are lengthier in number of questions, take more time to complete, and provide robust reports with data for many more measures. These assessments will give you a deeper look into process performance gaps between your organization and top, median, and bottom performers.

SELECT YOUR ASSESSMENT

Assessments are organized by their PCF level. Select the process category you are interested in.

The screenshot shows the APQC Benchmarking Portal interface. At the top, there is a navigation bar with the APQC logo and links for KNOWLEDGE BASE, BENCHMARKING PORTAL, and APQC NETWORK. On the right, there are links for Contact, Feedback, and APQC Blog, along with a user profile section for 'Christine' showing 'Welcome, Christine', 'My Profile', 'Logout', and '1 Item'. Below the navigation bar, there are tabs for LEARN MORE, GLOSSARY, and FAQ, and a search bar. The main content area features four large buttons: BENCHMARKS ON DEMAND, RAPID PERFORMANCE ASSESSMENT, OPEN STANDARDS BENCHMARKING (which is highlighted), and MY BENCHMARKING ACTIVITIES. Below these buttons, there are links for View, Edit Panel, and Edit site template. The 'Open Standards Benchmarking' section is active, displaying a description of the assessment, a list of participant options (Organizations and Research Areas), and a table of Research Areas and Assessments. The '3.0 Financial Management (1009)' category is selected, showing a list of assessments including Accounts Payable and Expense Reimbursement, Accounts Receivable, Customer Credit and Invoicing, Finance Organization, General Accounting and Reporting, Internal Controls, and Payroll.

Open Standards Benchmarking

Learn exactly where your business processes stack up against the competition using comprehensive assessments available through APQC's Open Standards Benchmarking. Launched in 2004, Open Standards Benchmarking is powered by a database underwritten by organizations that support the creation of common, open frameworks to measure processes. Based on APQC's widely-adopted [Process Classification Framework](#), the database contains more than 1,200 standardized measures spanning people, process, and technology.

Assessments provide insight into your key organizational processes to help identify performance gaps. Upon completion of an assessment, you will receive a report containing deep, accurate, relevant, and timely benchmarks you can trust—each data point goes through APQC's rigorous, seven-step validation process to ensure the highest level of accuracy before admission to the database. You will also have the opportunity to choose peer groups to include in your report such as industry, geography, and revenue category.

To get started, choose an assessment from the list below:

Research Areas	Assessments
2.0 Product Development (1003)	Accounts Payable and Expense Reimbursement
3.0 Sales and Marketing (1004)	Accounts Receivable
4.0 Supply Chain Management (1005)	Customer Credit and Invoicing
6.0 Human Capital Management (1007)	Finance Organization
7.0 Information Technology (1008)	General Accounting and Reporting
3.0 Financial Management (1009)	Internal Controls
	Payroll

Once you select an assessment, you will see a page with additional information about the purpose of the assessment, what you will get out of it, as well as data for one of the measures included in the report for the assessment.

In the upper right, you will find a list of resources to help you in the collection of the data you will need to complete the assessment.

PROVIDE INFORMATION ABOUT YOUR ORGANIZATION

Once you decide on the assessment you'd like to complete, click [Start Assessment](#). You will then be taken to a different interface where you will be asked to complete some information about your organization and the business entity, or part of your organization, you would like to assess.

If you have participated in any Open Standards Benchmarking before, whether Rapid Performance Assessments or the full assessments, you will either need to assign your assessment to one of the business entities already in your profile or create a new one.

For any questions, or to request assistance, please contact the Open Standards Benchmarking Help Desk at osb@apqc.org.

ONCE YOU'VE COMPLETED YOUR ASSESSMENT

Once your assessment has been completed, your responses will go through a rigorous validation process by APQC's data analysis team. They will contact you if clarification is needed around any of your responses. Pending time for validation, please expect a report within 2 weeks. You will receive metric information only for those measure questions for which you provided answers. Assessments must be at least 65% complete to receive a report.