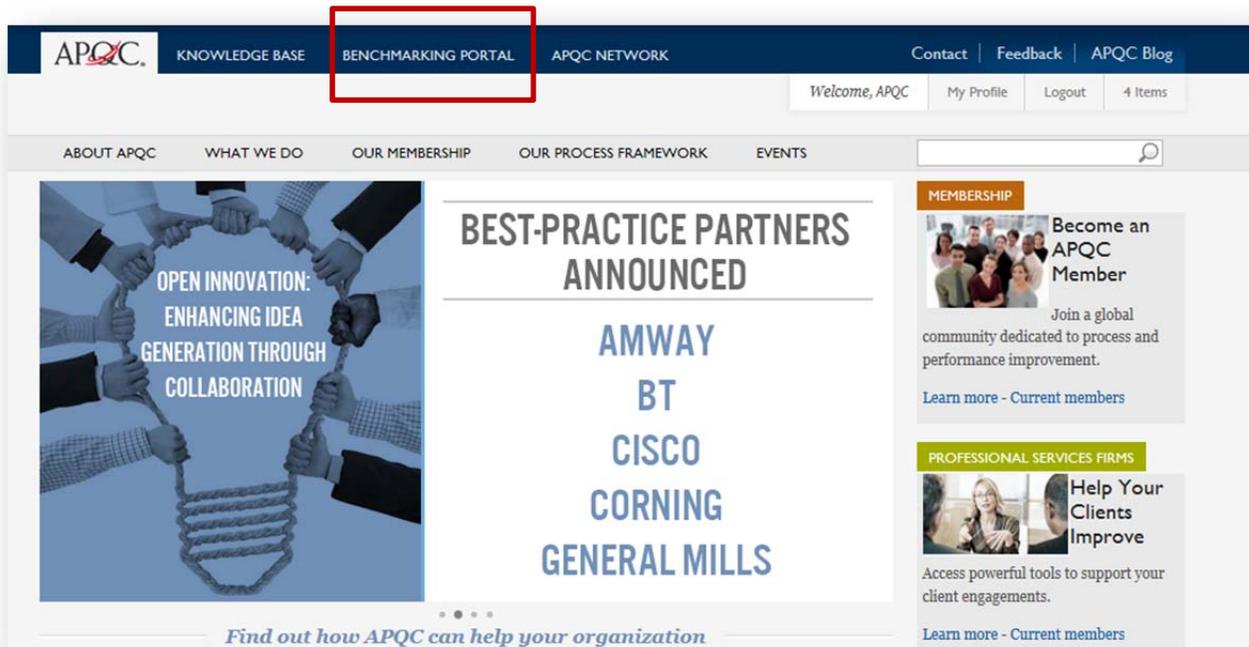


APQC's Benchmarking Portal: A User's Guide for Professional Services Firm Members

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 two options.

APQC KNOWLEDGE BASE BENCHMARKING PORTAL APQC NETWORK Contact Feedback APQC Blog

Welcome, APQC My Profile Logout

LEARN MORE GLOSSARY FAQ

Welcome to the APQC Benchmarking Portal

The single destination to manage all of your benchmarking activities.

Ready to start?

Get Set. Go. Select an option below to continue.

BENCHMARKS ON DEMAND

No data submission required. Select measures and peer groups, receive an instant metric report.

Contact [Cathy Hill](#) to learn how to license APQC Benchmarks.

[GET STARTED](#)

RAPID PERFORMANCE ASSESSMENT

Submit organizational data into a high-level assessment. Select peer groups, receive a comparative report within two business days.

[GET STARTED](#)

OPEN STANDARDS BENCHMARKING

Submit organizational data into a detailed assessment. Complete a validation process, receive report within two weeks.

[GET STARTED](#)

First time here?

[Learn more about the portal >>](#)

[User Guide](#) | [Glossary](#) | [FAQs](#)

New to benchmarking?
Learn about benchmarking with APQC. >>

MY BENCHMARKING ACTIVITIES
[View All >>](#)

NEWS & NOTES

[Join the PCF Community on LinkedIn!](#)

[Recently released! PCF v6.0.0 Retail framework.](#)

RELATED DOCUMENTS

[APQC's Process Classification Framework](#)

[Using Process Frameworks and Reference Models to Get Real Work Done \(Collection\)](#)

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 for licensing options.

Rapid Performance Assessments

Rapid Performance Assessments are high-level assessments that include KPI's meant to give you and your client 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. 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 showing 'Welcome, APQC', 'My Profile', and 'Logout'. Below the navigation bar, there are three main sections: 'LEARN MORE', 'GLOSSARY', and 'FAQ'. The main content area is divided into three columns: 'Browse by PCF Category', 'Select Assessment', and 'Included Measures'. The 'Browse by PCF Category' column lists various categories, with '8.0 Manage Financial Resources' selected. The 'Select Assessment' column lists assessments, with 'General Accounting and Reporting' selected. The 'Included Measures' column lists 10 measures for the selected assessment.

Browse by PCF Category	Select Assessment	Included Measures
Download the PCF	Accounts Payable and Expense Reimbursement >	> Cycle time in days to complete the monthly consolidated financial statements*
2.0 Develop and Manage Products and Services >	Accounts Receivable >	> Cycle time in days between completion of annual consolidated financial statements and the release of earnings
4.0 Deliver Products and Services >	Credit & Invoicing >	> Cycle time in days between completion of quarterly consolidated financial statements and the release of earnings
6.0 Develop and Manage Human Capital >	Finance Organization >	> Cycle time in days from producing annual flash reports to completing consolidated annual financial statements*
7.0 Manage Information Technology >	General Accounting and Reporting >	> Cycle time in calendar days from producing monthly flash reports and completing the monthly consolidated financial statements*
8.0 Manage Financial Resources >	Internal Controls >	> Cycle time in days to perform annual close at the site level*
	Payroll >	> Cycle time in days to produce period-end management reports
	Planning and Management Accounting >	> Manual journal entry percentage
	Sales and Order Management >	> Number of FTEs for the process group "perform general accounting and reporting" (excluding fixed assets) per \$1 billion revenue*
		> Number of FTEs for the process "perform financial reporting" per \$1 billion revenue*

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 THE ORGANIZATION YOU ARE ASSESSING

So that the data for the organization you are assessing can be validated and compared against peer groups, we need to now just a few pieces of information about the organization for which you are submitting data.

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', along with user options: 'Welcome, APQC', 'My Profile', and 'Logout'. Below the navigation bar, there are tabs for 'LEARN MORE', 'GLOSSARY', and 'FAQ', and a search bar. The main content area features three icons: 'RAPID PERFORMANCE ASSESSMENT', 'OPEN STANDARDS BENCHMARKING', and 'MY BENCHMARKING ACTIVITIES'. The 'MY BENCHMARKING ACTIVITIES' section is active, showing a progress indicator 'Step 2 of 2' and buttons for '<< Select assessment' and 'Take assessment >>'. The form fields include: 'Organization being assessed: *' (text input), 'Name of the company and business unit or part of organization that you're supplying data for. Example: "MyCompany finance function North America"', 'Activity name: *' (text input), 'Describe what you're doing to remind yourself later - we'll show this in your benchmarking activity list. For example: "Pre-ERP system implementation benchmarks"', 'Country: *' (dropdown menu with 'United States' selected), and 'NAICS Code: *' (text input). A 'DATA COLLECTION TOOLS' box on the right contains the text: 'Access tools to help you gather the data you need to complete one of the Rapid Performance Assessments.' At the bottom, there is a checkbox for 'Terms of Use and Notices *' and a note: 'In order to proceed, you must accept the terms and conditions. If you have any questions, please contact the APQC Helpdesk for more information.'

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 or your client's company's Finance organization, you may want to input: "MyCompany finance function North America".

Please note: If you are submitting data on behalf of your client, your client's company name will not be published as an Open Standards Benchmarking participant unless someone from that same company submitted data independently.

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 displays the APQC Benchmarking Portal interface. At the top, there is a dark blue navigation bar with the APQC logo and tabs for KNOWLEDGE BASE, BENCHMARKING PORTAL (selected), and APQC NETWORK. On the right side of this bar are links for Contact, Feedback, and APQC Blog. Below the navigation bar, a user profile section shows "Welcome, APQC", "My Profile", and "Logout". A secondary navigation bar includes "LEARN MORE", "GLOSSARY", "FAQ", and a search box. Below this are three main activity categories: "RAPID PERFORMANCE ASSESSMENT", "OPEN STANDARDS BENCHMARKING", and "MY BENCHMARKING ACTIVITIES". Under "MY BENCHMARKING ACTIVITIES", there are two sub-sections: "My Benchmark Reports" and "My Assessments". The "My Assessments" section contains a table with the following data:

Activity name	APQC name	Survey type	Date started	Survey status	Action
Test Assessment	General Accounting and Reporting	Rapid Performance Assessment	Tue, 04/23/2013 - 4:30pm	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 website. The top navigation bar includes 'APQC KNOWLEDGE BASE', 'BENCHMARKING PORTAL', and 'APQC NETWORK'. On the right, there are links for 'Contact', 'Feedback', and 'APQC Blog', along with a user menu showing 'Welcome, APQC', 'My Profile', and 'Logout'. Below the navigation bar, there are three main categories: 'RAPID PERFORMANCE ASSESSMENT', 'OPEN STANDARDS BENCHMARKING', and 'MY BENCHMARKING ACTIVITIES'. The 'OPEN STANDARDS BENCHMARKING' section is selected and expanded, showing a description of the assessment process and a list of 'Participant List' options: 'Organizations (alphabetical)', 'Organizations (by industry)', 'Research Areas (alphabetical)', and 'Research Areas (by industry)'. Below this, there are two columns: 'Research Areas' and 'Assessments'. The 'Research Areas' column lists various categories like '2.0 Product Development (1003)', '3.0 Sales and Marketing (1004)', '4.0 Supply Chain Management (1005)', '6.0 Human Capital Management (1007)', '7.0 Information Technology (1008)', '3.0 Financial Management (1009)', and 'Innovation'. The 'Assessments' column lists specific processes like 'Accounts Payable and Expense Reimbursement', 'Accounts Receivable', 'Customer Credit and Invoicing', 'Finance Organization', 'General Accounting and Reporting', 'Internal Controls', 'Payroll', 'Planning and Management Accounting', and 'Sales and Order Management'. A reference to the 'Process Classification Framework' is also present.

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.