THE FRAMEWORK FOR PROCESS IMPROVEMENT

Experience shows that benchmarking’s potential 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 model that allows organizations to see their activities from a cross-industry process viewpoint.

Originally created in 1992 by APQC and a group of members, the framework has experienced more than a decade of creative use by hundreds of organizations worldwide. The PCF is supported by the Open Standards Benchmarking Collaborative™ (OSBC) database and the Collaborative’s advisory council of global industry leaders as an open standard. The PCF will continuously be enhanced as the OSBC database further develops definitions, processes, and measures related to process improvement. Please visit APQC’s Web site periodically for updates. The PCF is available for organizations of all industries and sizes at no charge by visiting www.apqc.org.

The PCF enables organizations to understand their inner workings from a horizontal process viewpoint, rather than a vertical functional viewpoint. The PCF does not list all processes within a specific organization, and every process listed in the framework is not present in every organization.

HISTORY

The Process Classification Framework was originally envisioned as a taxonomy of business processes. The initial design involved more than 80 organizations with a strong interest in advancing the use of benchmarking in the United States and worldwide.

In 2003 APQC initiated an effort to revise and update the PCF to reflect new business models and emerging dynamics. With guidance from a set of key members, the updated PCF was released in May 2004. A version released in June 2005 significantly updated sections 7.0 and 12.0. This release includes minor updates to 2.0 and a number of new activities in 4.0. APQC intends to release updated versions annually.

APQC would like to acknowledge the following organizations for their participation and help in later versions: the Boeing Co., Boehringer Ingelheim GmbH, BT Group plc, Ensco International Inc., Ford Motor Co., IBM Corp., Schlumberger Ltd., Solvay S.A., and the U.S. Navy. APQC would also like to acknowledge the other APQC members that have contributed and continue to contribute to the ongoing development of the PCF.
Interpreting the PCF

Category: The highest level within the PCF indicated by whole numbers (e.g., 8.0 and 9.0).

Process Group: All PCF items with one decimal numbering (e.g., 8.1 and 9.1) are considered a process area.

Process: All PCF items with two decimal numbering (e.g., 8.1.1 and 9.1.2) are considered processes.

Activity: Items with three decimals (e.g., 8.3.1.1 and 9.1.1.1) are considered activities within a process.

Example:
Deliver Products and Services (Category) (4.0)
Plan for and acquire necessary resources—supply chain planning (Process Group) (4.1)
Manage demand for products and services (Process) (4.1.1)
Develop baseline forecasts (Activity) (4.1.1.1)
Collaborate with customers (Activity) (4.1.1.2)
PCF Overview

OPERATING PROCESSES

1.0 Develop Vision and Strategy
2.0 Design and Develop Products and Services
3.0 Market and Sell Products and Services
4.0 Deliver Products and Services
5.0 Manage Customer Service

MANAGEMENT AND SUPPORT SERVICES

6.0 Develop and Manage Human Capital
7.0 Manage Information Technology
8.0 Manage Financial Resources
9.0 Acquire, Construct, and Manage Property
10.0 Manage Environmental Health and Safety
11.0 Manage External Relationships
12.0 Manage Knowledge, Improvement, and Change
1.0 Develop Vision and Strategy

1.1 Define the business concept and long-term vision

1.1.1 Assess the external environment
1.1.1.1 Analyze and evaluate competition
1.1.1.2 Identify economic trends
1.1.1.3 Identify political and regulatory issues
1.1.1.4 Assess new technology innovations
1.1.1.5 Analyze demographics
1.1.1.6 Identify social and cultural changes
1.1.1.7 Identify ecological concerns
1.1.2 Survey market and determine customer needs and wants
1.1.2.1 Conduct qualitative/quantitative assessments
1.1.2.2 Capture and assess customer needs
1.1.3 Select relevant markets

1.1.4 Perform internal analysis
1.1.4.1 Analyze organizational characteristics
1.1.4.2 Create baselines for current processes
1.1.4.3 Analyze systems and technology
1.1.4.4 Analyze financial positions
1.1.4.5 Identify enterprise core competencies
1.1.5 Establish strategic vision
1.1.5.1 Align stakeholders around strategic vision
1.1.5.2 Communicate strategic vision to stakeholders

1.2 Develop business strategy

1.2.1 Develop overall mission statement
1.2.2 Evaluate strategic options
1.2.3 Select long-term business strategy
1.2.4 Coordinate and align functional and process strategies
1.2.5 Design the organizational structure and relationships between organizational units
1.2.6 Develop and set organizational goals
1.2.7 Formulate business unit strategies

1.3 Manage strategic initiatives

1.3.1 Develop strategic initiatives
1.3.2 Evaluate strategic initiatives
1.3.3 Select strategic initiatives
1.3.4 Establish high-level measures

1.4 Establish strategic vision

1.4.1 Align stakeholders around strategic vision
1.4.2 Communicate strategic vision to stakeholders

2.0 Design and Develop Products and Services

2.1 Design products and services

2.1.1 Develop strategy and concepts for new products and services
2.1.1.1 Research customer and market needs
2.1.1.2 Manage portfolio
2.1.1.3 Plan and develop cost and quality targets
2.1.1.4 Develop product life cycle and development timing targets

2.1.2 Produce new products and services, and evaluate and refine existing products and services
2.1.2.1 Translate customer wants and needs into product/service ideas
2.1.2.2 Generate new product/service ideas
2.1.2.3 Plan for product modifications
2.1.2.4 Evaluate existing products based on NPD strategy
2.1.2.5 Identify enhancements/extensions to existing products and services

2.1.3 Design, build, and evaluate products and services

2.1.3.1 Assign resources to product/service project
2.1.3.2 Prepare high-level business case and technical assessment
2.1.3.3 Develop product/service design specifications
2.1.3.4 Document design specifications
2.1.3.5 Build prototypes
2.1.3.6 Eliminate quality and reliability problems
2.1.3.7 Conduct in-house product/service testing and evaluate feasibility
2.1.3.8 Identify design/development performance indicators
2.1.3.9 Collaborate design with suppliers and contract manufacturers

2.1.4 Test market for new or revised products and services

2.1.4.1 Prepare detailed market study
2.1.4.2 Conduct customer tests and interviews
2.1.4.3 Finalize product/service characteristics and business cases
2.1.4.4 Finalize technical requirements
2.1.4.5 Identify requirements for changes to manufacturing/delivery processes

2.1.5 Prepare for production and marketplace introduction

2.1.5.1 Develop and test prototype production and/or service delivery process
2.1.5.2 Design and obtain necessary materials and equipment
2.1.5.3 Install and validate production process or methodology
2.1.5.4 Introduce new product and/or service commercially

2.1.6 Support and implement changes to product manufacturing and service delivery process

2.1.6.1 Monitor production runs
2.1.6.2 Request engineering change
2.1.6.3 Manage engineering change order
2.1.6.4 Identify product/service design and configuration changes
2.1.6.5 Capture feedback to “refine existing products and services” process
2.1.6.6 Identify manufacturing/service delivery process performance indicators

3.0 Market and Sell Products and Services
3.1 Develop marketing, distribution, and channel strategy
  3.1.1 Understand consumer needs and predict customer purchasing behavior
    3.1.1.1 Develop and manage customer profiles
  3.1.2 Identify market segments and target customers
    3.1.2.1 Determine market share gain/loss
  3.1.3 Define offering and positioning
  3.1.4 Define and manage channel strategy
3.2 Develop and manage sales strategy
  3.2.1 Develop customer management strategies
  3.2.2 Establish customer management goals
  3.2.3 Develop sales forecast
  3.2.4 Establish overall sales budgets
  3.2.5 Establish customer management metrics
    3.2.5.1 Determine customer loyalty/lifetime value
    3.2.5.2 Analyze customer attrition and retention rates
  3.2.6 Prepare/analyze/evaluate customer management results
3.3 Manage advertising, pricing, and promotional activities
  3.3.1 Develop and manage advertising
    3.3.1.1 Define advertising objectives and strategy
    3.3.1.2 Define target audience
    3.3.1.3 Engage third-party advertising agency
    3.3.1.4 Develop advertising
  3.3.2 Develop and manage external communication
    3.3.2.1 Develop media budget
    3.3.2.2 Develop media plan
    3.3.2.3 Execute media plan
  3.3.3 Develop and manage placement and campaign management
  3.3.4 Develop and manage pricing
    3.3.4.1 Develop volume/unit forecast and set price
    3.3.4.2 Execute pricing plan
    3.3.4.3 Evaluate pricing performance
    3.3.4.4 Refine pricing as needed
  3.3.5 Develop and manage promotional activities
    3.3.5.1 Define direct to consumer promotional concepts
    3.3.5.2 Plan and test direct to consumer activities
    3.3.5.3 Execute direct to consumer promotional activities
3.4 Manage sales partners and alliances
3.5 Manage sales opportunity and sales pipeline
  3.5.1 Identify and manage key customers and accounts
    3.5.1.1 Develop key customer plans
    3.5.1.2 Identify priority customers
    3.5.1.3 Establish budgets
    3.5.1.4 Develop sales/key account plan
    3.5.1.5 Schedule calls to customers
    3.5.1.6 Execute agreed-to sales plan
    3.5.1.7 Prepare/Analyze/Evaluate sales results
    3.5.1.8 Initiate sales order process
3.6 Sales order management
  3.6.1 Manage inbound sales orders
    3.6.1.1 Accept and validate sales orders
    3.6.1.2 Collect and maintain customer account information
    3.6.1.3 Determine stock availability
    3.6.1.4 Determine logistics and transportation
    3.6.1.5 Enter orders into system and identify/perform cross-sell/up-sell activity
    3.6.1.6 Process back orders and updates
    3.6.1.7 Handle order inquiries including post-order fulfillment transactions
  3.6.2 Manage outbound sales and campaign calls
3.7 Manage order fulfillment
3.8 Manage order analysis and improvement
3.9 Manage sales process improvement
3.10 Manage sales performance and productivity
4.0 Deliver Products and Services
4.1 Plan for and acquire necessary resources (Supply Chain Planning)
  4.1.1 Manage demand for products and services
    4.1.1.1 Develop baseline forecasts
    4.1.1.2 Collaborate with customers
    4.1.1.3 Develop consensus forecast
4.1.4 Allocate available to promise
4.1.2 Create materials plan
4.1.2.1 Create unconstrained plan
4.1.2.2 Collaborate with supplier and contract manufacturers
4.1.2.3 Identify critical materials and supplier capacity
4.1.2.4 Generate constrained plan
4.1.3 Schedule production
4.1.3.1 Generate site level plan
4.1.3.2 Manage work-in-progress inventory
4.1.3.3 Collaborate with suppliers
4.1.3.4 Generate and execute detail schedule

4.2 Procure materials and services
4.2.1 Develop sourcing strategies
4.2.1.1 Develop procurement plan
4.2.1.2 Clarify purchasing requirements
4.2.1.3 Match needs to supply capabilities
4.2.1.4 Analyze company’s spend profile
4.2.1.5 Seek opportunities to improve efficiency and value
4.2.1.6 Collaborate with suppliers to identify sourcing opportunities
4.2.2 Select suppliers and develop/maintain contracts
4.2.2.1 Identify suppliers
4.2.2.2 Certify and validate suppliers
4.2.2.3 Negotiate contracts
4.2.2.4 Manage contracts
4.2.3 Order materials and services
4.2.3.1 Process/Review requisitions
4.2.3.2 Approve requisitions
4.2.3.3 Solicit/Track vendor quotes
4.2.3.4 Create/Distribute purchase orders
4.2.3.5 Expedite orders and satisfy inquiries
4.2.3.6 Record receipt of goods
4.2.3.7 Research/Resolve exceptions
4.2.4 Appraise and develop suppliers
4.2.4.1 Monitor/Manage supplier information
4.2.4.2 Prepare/Analyze spending and vendor performance
4.2.4.3 Support inventory and production processes

4.3 Produce/Manufacture/Deliver product
4.3.1 Schedule production
4.3.1.1 Generate site level plan
4.3.1.2 Generate detailed schedule
4.3.2 Produce product
4.3.2.1 Execute detailed schedule
4.3.3 Schedule and perform maintenance

4.4 Deliver product service to customer
4.4.1 Confirm specific service requirements for individual customer
4.4.2 Identify and schedule resources to meet service requirements
4.4.2.1 Create resourcing plan and schedule
4.4.2.2 Create service order fulfillment schedule
4.4.2.3 Develop service order
4.4.3 Provide the service to specific customers
4.4.3.1 Organize daily service order fulfillment schedule
4.4.3.2 Dispatch resources
4.4.3.3 Manage order fulfillment progress
4.4.3.4 Validate order fulfillment block completion
4.4.4 Ensure quality of service
4.4.4.1 Identify completed orders for feedback
4.4.4.2 Solicit customer feedback on services delivered
4.4.4.3 Process customer feedback on services delivered

4.5 Manage logistics and warehousing
4.5.1 Define logistics strategy
4.5.1.1 Translate customer service requirements into logistics requirements
4.5.1.2 Design logistics network
4.5.1.3 Communicate outsourcing needs
4.5.1.4 Develop and maintain delivery service policy
4.5.1.5 Optimize transportation schedules and costs
4.5.1.6 Define key performance measures
4.5.2 Plan inbound material flow
4.5.2.1 Plan inbound material receipts
4.5.2.2 Manage inbound material flow
4.5.2.3 Monitor inbound delivery performance
4.5.2.4 Manage flow of returned products
4.5.3 Operate warehousing
4.5.3.1 Track inventory deployment
4.5.3.2 Receive, inspect, and store inbound deliveries
4.5.3.3 Track product availability
4.5.3.4 Pick, pack, and ship product for delivery
4.5.3.5 Track inventory accuracy
4.5.3.6 Track third-party logistics storage and shipping performance
4.5.4 Operate outbound transportation
4.5.4.1 Plan, transport, and deliver outbound product
4.5.4.2 Track carrier delivery performance
4.5.4.3 Manage transportation fleet
4.5.4.4 Process and audit carrier invoices and documents
5.0 Manage Customer Service

5.1 Develop customer care/customer service strategy
5.1.1 Develop customer segmentation/prioritization (e.g., tiers)
5.1.2 Define customer service policies and procedures
5.1.3 Establish service levels for customers

5.2 Manage customer service
5.2.1 Manage customer requests/inquiries
   5.2.1.1 Receive customer requests/inquiries
   5.2.1.2 Route customer requests/inquiries
   5.2.1.3 Respond to customer requests/inquiries
5.2.2 Manage customer complaints
   5.2.2.1 Enter customer complaints
   5.2.2.2 Route customer complaints
   5.2.2.3 Resolve customer complaints

5.3 Perform after sales installations and repairs

5.4 Measure and evaluate customer satisfaction
5.4.1 Measure customer satisfaction level for customer requests/inquiries
   5.4.1.1 Solicit customer feedback on customer service experience
   5.4.1.2 Analyze customer service data and identify improvement opportunities
5.4.2 Measure customer satisfaction of customer-complaint handling and resolution
   5.4.2.1 Solicit customer feedback on complaint handling and resolution
   5.4.2.2 Analyze customer complaint data and identify improvement opportunities
5.4.3 Measure customer satisfaction with products and services
   5.4.3.1 Solicit post-sale customer feedback on products and services
   5.4.3.2 Collect warranty data and product return reasons
   5.4.3.3 Analyze product and service satisfaction data and identify improvement opportunities

5.5 Manage customer service work force
5.5.1 Develop work force requirements and schedule work force
   5.5.1.1 Forecast volume of customer service contacts
   5.5.1.2 Forecast volume of inbound sales contacts
   5.5.1.3 Schedule customer service work force

5.5.2 Track work force utilization
5.5.3 Evaluate quality of customer interaction with customer service representatives
5.5.4 Monitor and evaluate agent calls with customers
5.5.5 Monitor and evaluate agent correspondence with customers

6.0 Develop and Manage Human Capital

6.1 Create and manage human resources (HR) planning, policies, and strategies
6.1.1 Manage/Align/Deliver human resources strategy
   6.1.1.1 Identify organizational strategic HR needs
   6.1.1.2 Identify organizational tactical HR needs
   6.1.1.3 Define HR and business function roles and accountability
   6.1.1.4 Determine HR costs
6.1.2 Develop and implement HR plans
   6.1.2.1 Develop work force plan
   6.1.2.2 Develop compensation plan
   6.1.2.3 Develop succession plan
   6.1.2.4 Develop employee diversity plan
   6.1.2.5 Develop other HR programs
   6.1.2.6 Develop HR policies
   6.1.2.7 Administer HR policies
   6.1.2.8 Plan employee benefits
6.1.3 Monitor and update plans
   6.1.3.1 Measure realization of objectives
   6.1.3.2 Measure contribution to business strategy
   6.1.3.3 Communicate plans and provide updates to stakeholders
   6.1.3.4 Determine value added from HR function
   6.1.3.5 Review and revise HR plans

6.2 Recruit, source, and select employees
6.2.1 Create and develop employee requisitions
   6.2.1.1 Develop and open job requisition
   6.2.1.2 Develop a job description
   6.2.1.3 Post requisition
   6.2.1.4 Manage internal/external job posting Web sites
6.2.2 Recruit candidates
   6.2.2.1 Determine recruitment methods
   6.2.2.2 Perform recruiting activities/events
   6.2.2.3 Manage recruitment vendors
6.2.3 Screen and select candidates
   6.2.3.1 Identify and deploy candidate selection tools
PROCESS CLASSIFICATION FRAMEWORK

6.2.3.2 Interview candidates
6.2.3.3 Test candidates
6.2.3.4 Select and reject candidates

6.2.4 Manage preplacement verification
6.2.4.1 Complete candidate background information
6.2.4.2 Conduct background checks
6.2.4.3 Recommend/Not recommend candidate

6.2.5 Manage new hire/re-hire
6.2.5.1 Draw up and make offer
6.2.5.2 Negotiate offer
6.2.5.3 Hire candidate

6.2.6 Track candidates
6.2.6.1 Create applicant record
6.2.6.2 Manage/Track applicant data
6.2.6.3 Archive and retain records of non-hires

6.3 Develop and counsel employees
6.3.1 Manage employee orientation and deployment
6.3.1.1 Create/Maintain employee induction program
6.3.1.2 Introduce new employees to managers
6.3.1.3 Introduce workplace

6.3.2 Manage employee performance
6.3.2.1 Define performance objectives
6.3.2.2 Review, appraise, and manage employee performance
6.3.2.3 Evaluate and review performance program

6.3.3 Manage employee relations
6.3.3.1 Manage health and safety
6.3.3.2 Manage labor relations
6.3.3.3 Manage collective bargaining process
6.3.3.4 Manage labor management partnerships

6.3.4 Manage employee development
6.3.4.1 Develop competency management plans
6.3.4.2 Develop employee career plans
6.3.4.3 Manage employee skills development

6.3.5 Develop and train employees
6.3.5.1 Align employee and organization development needs
6.3.5.2 Develop functional/process competencies
6.3.5.3 Establish training needs by analysis of required and available skills
6.3.5.4 Develop, conduct, and manage employee and/or management training programs

6.3.6 Manage employee talent
6.3.6.1 Match resources to requirements

6.4 Reward and retain employees
6.4.1 Develop and manage reward, recognition, and motivation programs
6.4.1.1 Develop salary/compensation structure and plan
6.4.1.2 Develop benefits and reward plan
6.4.1.3 Perform competitive analysis of benefit and rewards
6.4.1.4 Identify compensation requirements based on financial, benefits, and HR policies
6.4.1.5 Administer compensation and rewards to employees
6.4.1.6 Reward and motivate employees

6.4.2 Manage and administer benefits
6.4.2.1 Deliver employee benefits program
6.4.2.2 Administer benefit enrollment
6.4.2.3 Process claims
6.4.2.4 Perform benefit reconciliation

6.4.3 Manage employee assistance and retention
6.4.3.1 Deliver programs to support work/life balance for employees
6.4.3.2 Develop family support systems
6.4.3.3 Review retention and motivation indicators
6.4.3.4 Review compensation plan
6.4.4 Payroll administration

6.5 Re-deploy and retire employees
6.5.1 Manage promotion and demotion process
6.5.2 Manage separation
6.5.3 Manage retirement
6.5.4 Manage leave of absence
6.5.5 Develop and implement employee outplacement
6.5.6 Manage deployment of personnel
6.5.7 Relocate employees and manage assignments
6.5.8 Manage employment reduction and retirement
6.5.9 Manage expatriates
6.5.10 Manage employee relocation process

6.6 Manage employee information
6.6.1 Manage reporting processes
6.6.2 Manage employee inquiry process
6.6.3 Manage and maintain employee data
6.6.4 Manage human resource information systems (HRIS)
6.6.5 Develop and manage employee metrics
6.6.6 Develop and manage time and attendance
6.6.7 Manage employee communication
6.6.7.1 Develop employee communication plan
6.6.7.2 Manage/Collect employee suggestions
6.6.7.3 Manage employee grievances
6.6.7.4 Publish employee communications

7.0 Manage Information Technology

7.1 Manage the business of information technology (IT)
7.1.1 Develop the enterprise IT strategy
7.1.1.1 Build strategic intelligence
7.1.1.2 Identify long-term IT needs of the enterprise in collaboration with stakeholders
7.1.1.3 Develop and maintain a long-term business-focused enterprise IT strategy and governance model

7.1.2 Define the enterprise architecture
7.1.2.1 Establish the enterprise architecture definition
7.1.2.2 Maintain the relevance of the enterprise architecture
7.1.2.3 Act as clearinghouse for IT research and innovation
7.1.2.4 Govern the enterprise architecture

7.1.3 Manage the IT portfolio
7.1.3.1 Establish the IT portfolio
7.1.3.2 Analyze and evaluate the value of the IT portfolio for the enterprise
7.1.3.3 Provision resources in accordance with strategic priorities

7.1.4 Perform IT research and innovation
7.1.4.1 Research technologies to innovate IT services and solutions
7.1.4.2 Transition viable technologies for IT services and solutions development

7.1.5 Perform IT financial management
7.1.5.1 Develop and maintain IT services and solutions cost transparency
7.1.5.2 Establish and maintain accounting process
7.1.5.3 Tie project funding to business case decision checkpoints

7.1.6 Evaluate and communicate IT business value and performance
7.1.6.1 Establish and monitor key performance indicators
7.1.6.2 Evaluate IT plan performance
7.1.6.3 Communicate IT value

7.1.7 Perform IT staff management
7.1.7.1 Develop IT leadership and staff
7.1.7.2 Manage IT staff performance

7.1.8 Manage IT suppliers and contracts
7.1.8.1 Develop IT (development and delivery) sourcing strategies
7.1.8.2 Negotiate with suppliers
7.1.8.3 Establish and maintain supplier relationships
7.1.8.4 Evaluate supplier performance
7.1.8.5 Assess contract performance

7.2 Develop and manage IT customer relationships
7.2.1 Develop IT services and solutions strategy
7.2.1.1 Research IT services and solutions to address business and user requirements
7.2.1.2 Translate business and user requirements into IT services and solutions requirements

7.2.2 Develop and manage IT service levels
7.2.2.1 Create and maintain the IT services and solutions catalog
7.2.2.2 Establish and maintain business and IT service level agreements
7.2.2.3 Evaluate and report service level attainment results
7.2.2.4 Communicate business and IT service level improvement opportunities

7.2.3 Perform demand side management (DSM) for IT services
7.2.3.1 Analyze IT services and solutions consumption and usage
7.2.3.2 Develop and implement incentive programs that improve consumption efficiency
7.2.3.3 Develop volume/unit forecast for IT services and solutions

7.2.4 Manage IT customer satisfaction
7.2.4.1 Capture and analyze customer satisfaction
7.2.4.2 Assess and communicate customer satisfaction patterns
7.2.4.3 Initiate improvements based on customer satisfaction patterns

7.2.5 Market IT services and solutions
7.2.5.1 Develop IT services and solutions marketing strategy
7.2.5.2 Develop and manage IT customer strategy
7.2.5.3 Manage IT services and solutions advertising and promotional campaigns
7.2.5.4 Process and track IT services and solutions orders

7.3 Manage business resiliency and risk
7.3.1 Develop and manage business resilience
7.3.1.1 Develop the business resilience strategy
7.3.1.2 Perform continuous business operations planning
7.3.1.3 Test continuous business operations
7.3.1.4 Maintain continuous business operations

7.3.2 Develop and manage regulatory compliance
7.3.2.1 Develop the regulatory compliance strategy
7.3.2.2 Establish regulatory compliance controls
7.3.2.3 Manage regulatory compliance remediation

7.3.3 Perform integrated risk management
7.3.3 Develop an integrated risk strategy and approach
7.3.3.1 Develop an integrated risk strategy
7.3.3.2 Manage integrated risks
7.3.4 Develop and implement security, privacy, and data protection controls
7.3.4.1 Establish information security, privacy, and data protection strategies and levels
7.3.4.2 Test, evaluate, and implement information security, and privacy and data protection controls
7.4 Manage enterprise information
7.4.1 Develop information and content management strategies
7.4.1.1 Understand information and content management needs and the role of IT services for executing the business strategy
7.4.1.2 Assess the information and content management implications of new technologies
7.4.1.3 Identify and prioritize information and content management actions
7.4.2 Define the enterprise information architecture
7.4.2.1 Define information elements, composite structure, logical relationships and constraints, taxonomy, and derivation rules
7.4.2.2 Define information access requirements
7.4.2.3 Establish data custodianship
7.4.2.4 Manage changes to content data architecture requirements
7.4.3 Manage information resources
7.4.3.1 Define the enterprise information/data policies and standards
7.4.3.2 Develop and implement data and content administration
7.4.4 Perform enterprise data and content management
7.4.4.1 Define sources and destinations of content data
7.4.4.2 Manage technical interfaces to users of content
7.4.4.3 Manage retention, revision, and retirement of enterprise information
7.5 Develop and maintain information technology solutions
7.5.1 Develop the IT development strategy
7.5.1.1 Establish sourcing strategy for IT development
7.5.1.2 Define development processes, methodologies, and tools’ standards
7.5.1.3 Select development methodologies and tools
7.5.2 Perform IT services and solutions life cycle planning
7.5.2.1 Plan development of new requirements
7.5.2.2 Plan development of feature and functionality enhancement
7.5.2.3 Develop life cycle plan for IT services and solutions
7.5.3 Develop and maintain IT services and solutions architecture
7.5.3.1 Create IT services and solutions architecture
7.5.3.2 Revise IT services and solutions architecture
7.5.3.3 Retire IT services and solutions architecture
7.5.4 Create IT services and solutions
7.5.4.1 Understand confirmed requirements
7.5.4.2 Design IT services and solutions components
7.5.4.3 Acquire/develop IT service/solution components
7.5.4.4 Train services and solutions resources
7.5.4.5 Test IT services/solutions
7.5.4.6 Confirm customer acceptance
7.5.5 Maintain IT services and solutions
7.5.5.1 Understand upkeep/enhance requirements and defect analysis
7.5.5.2 Design change to existing IT service/solution component
7.5.5.3 Acquire/Develop changed IT services/solution component
7.5.5.4 Test IT service/solution change
7.5.5.5 Retire solutions and services
7.6 Deploy information technology solutions
7.6.1 Develop the IT deployment strategy
7.6.1.1 Establish IT services and solutions change policies
7.6.1.2 Define deployment process, procedures, and tools standards
7.6.1.3 Select deployment methodologies and tools
7.6.2 Plan and implement changes
7.6.2.1 Plan change deployment
7.6.2.2 Communicate changes to stakeholders
7.6.2.3 Administer change schedule
7.6.2.4 Train impacted users
7.6.2.5 Distribute and install change
7.6.2.6 Verify change
7.6.3 Plan and manage releases
7.6.3.1 Understand and coordinate release design and acceptance
7.6.3.2 Plan release rollout
7.6.3.3 Distribute and install release
7.6.3.4 Verify release
7.7 Deliver and support information technology services

7.7.1 Develop IT services and solution delivery strategy

7.7.1.1 Establish sourcing strategy for IT delivery
7.7.1.2 Define delivery processes, procedures, and tools standards
7.7.1.3 Select delivery methodologies and tools

7.7.2 Develop IT support strategy

7.7.2.1 Establish sourcing strategy for IT support
7.7.2.2 Define IT support services

7.7.3 Manage IT infrastructure resources

7.7.3.1 Manage IT inventory and assets
7.7.3.2 Manage IT resource capacity

7.7.4 Manage IT infrastructure operations

7.7.4.1 Deliver IT services and solutions
7.7.4.2 Perform IT operations support services

7.7.5 Support IT services and solutions

7.7.5.1 Manage availability
7.7.5.2 Manage facilities
7.7.5.3 Manage backup/recovery
7.7.5.4 Manage performance and capacity
7.7.5.5 Manage incidents
7.7.5.6 Manage problems
7.7.5.7 Manage inquiries

7.8 Manage IT knowledge

7.8.1 Develop the IT knowledge management strategy

7.8.1.1 Understand IT knowledge needs
7.8.1.2 Understand current IT knowledge flow
7.8.1.3 Coordinate strategy and roles with the enterprise KM function
7.8.1.4 Plan IT knowledge management actions and priorities

7.8.2 Develop and maintain IT knowledge map

7.8.2.1 Define knowledge elements, logical relationships and constraints, and currency rules
7.8.2.2 Identify IT knowledge sources and repositories
7.8.2.3 Identify IT knowledge-sharing opportunities
7.8.2.4 Define IT knowledge processes and approaches

7.8.3 Manage IT knowledge life cycle

7.8.3.1 Gather knowledge elements from IT knowledge sources
7.8.3.2 Evaluate, create, and codify knowledge elements
7.8.3.3 Deploy codified IT knowledge
7.8.3.4 Update and retire IT knowledge
7.8.3.5 Evaluate and improve IT knowledge strategies and processes

8.0 Manage Financial Resources

8.1 Perform planning and management accounting

8.1.1 Perform planning/budgeting/forecasting

8.1.1.1 Develop and maintain budget policies and procedures
8.1.1.2 Prepare periodic budgets and plans
8.1.1.3 Prepare periodic forecasts

8.1.2 Perform cost accounting and control

8.1.2.1 Perform inventory accounting
8.1.2.2 Perform cost of sales analysis
8.1.2.3 Perform product costing
8.1.2.4 Perform variance analysis
8.1.2.5 Report on profitability

8.1.3 Perform cost management

8.1.3.1 Determine key cost drivers
8.1.3.2 Measure cost drivers
8.1.3.3 Determine critical activities
8.1.3.4 Manage asset resource deployment and utilization

8.1.4 Evaluate and manage financial performance

8.1.4.1 Assess customer and product profitability
8.1.4.2 Evaluate new products
8.1.4.3 Perform life cycle costing
8.1.4.4 Optimize customer and product mix
8.1.4.5 Track performance of new customer and product strategies
8.1.4.6 Prepare activity-based performance measures
8.1.4.7 Manage continuous cost improvement

8.2 Perform revenue accounting

8.2.1 Process customer credit

8.2.1.1 Establish credit policies
8.2.1.2 Analyze/approve new account applications
8.2.1.3 Review existing accounts
8.2.1.4 Produce credit/collection reports

8.2.2 Invoice customer

8.2.2.1 Maintain customer/product master files
8.2.2.2 Generate customer billing data
8.2.2.3 Transmit billing data to customers
8.2.2.4 Post receivable entries
8.2.2.5 Resolve customer billing inquiries

8.2.3 Process accounts receivable (AR)

8.2.3.1 Establish AR policies
8.2.3.2 Receive/Deposit customer payments
8.2.3.3 Apply cash remittances
8.2.3.4 Prepare AR reports
8.2.3.5 Post AR activity to the general ledger

8.2.4 Manage and process collections

8.2.4.1 Establish policies for delinquent accounts
8.2.4.2 Analyze delinquent account balances
8.2.4.3 Correspond/negotiate with delinquent accounts
8.2.4.4 Discuss account resolution with internal parties
8.2.4.5 Process adjustments/write-off balances

8.2.5 Manage and process adjustments/deductions
8.2.5.1 Establish policies/procedures for adjustments
8.2.5.2 Analyze adjustments
8.2.5.3 Correspond/Negotiate with customer
8.2.5.4 Discuss resolution with internal parties
8.2.5.5 Prepare chargeback invoices
8.2.5.6 Process-related entries

8.3 Perform general accounting and reporting
8.3.1 Manage policies and procedures
8.3.1.1 Negotiate service level agreements
8.3.1.2 Establish accounting policies
8.3.1.3 Set and enforce approval limits
8.3.1.4 Establish common financial systems
8.3.2 Perform general accounting
8.3.2.1 Maintain chart of accounts
8.3.2.2 Process journal entries
8.3.2.3 Process allocations
8.3.2.4 Process period end adjustments (e.g., accruals, currency conversions, etc.)
8.3.2.5 Post and reconcile intercompany transactions
8.3.2.6 Reconcile GL accounts
8.3.2.7 Perform consolidations and process eliminations
8.3.2.8 Prepare trial balance
8.3.2.9 Prepare and post management adjustments

8.3.3 Perform fixed asset accounting
8.3.3.1 Establish fixed asset policies and procedures
8.3.3.2 Maintain fixed asset master data files
8.3.3.3 Process and record fixed asset additions and retires
8.3.3.4 Process and record fixed asset adjustments, enhancements, revaluations, and transfers
8.3.3.5 Process and record fixed asset maintenance and repair expenses
8.3.3.6 Calculate and record depreciation expense
8.3.3.7 Reconcile fixed asset ledger
8.3.3.8 Track fixed assets including physical inventory
8.3.3.9 Provide fixed asset data to support tax, statutory, and regulatory reporting

8.3.4 Perform financial reporting
8.3.4.1 Prepare business unit financial statements
8.3.4.2 Prepare consolidated financial statements

8.3.4.3 Perform business unit reporting/review management reports
8.3.4.4 Perform consolidated reporting/review of cost management reports
8.3.4.5 Prepare statements for board review
8.3.4.6 Produce quarterly/annual filings and shareholder reports
8.3.4.7 Produce regulatory reports

8.4 Manage fixed assets
8.4.1 Perform capital planning and project approval
8.4.1.1 Develop capital investment policies and procedures
8.4.1.2 Develop and approve capital expenditure plans and budgets
8.4.1.3 Review and approve capital projects and fixed asset acquisitions
8.4.1.4 Conduct financial justification for project approval
8.4.2 Perform capital project accounting
8.4.2.1 Create project account codes
8.4.2.2 Record project-related transactions
8.4.2.3 Monitor and track capital projects and budget spending
8.4.2.4 Close/Capitalize projects
8.4.2.5 Measure financial returns on completed capital projects

8.5 Process payroll
8.5.1 Report time
8.5.1.1 Establish policies and procedures
8.5.1.2 Collect and record employee time worked
8.5.1.3 Analyze and report paid and unpaid leave
8.5.1.4 Monitor regular, overtime, and other hours
8.5.1.5 Analyze and report employee utilization
8.5.2 Manage pay
8.5.2.1 Enter employee time worked into payroll system
8.5.2.2 Maintain and administer employee earnings information
8.5.2.3 Maintain and administer applicable deductions
8.5.2.4 Monitor changes in tax status of employees
8.5.2.5 Process and distribute payments
8.5.2.6 Process and distribute manual checks
8.5.2.7 Process period end adjustments
8.5.2.8 Respond to employee payroll inquiries
8.5.3 Process taxes
8.5.3.1 Calculate and pay applicable payroll taxes
8.5.3.2 Produce and distribute employee annual tax statements
8.5.3.3 File regulatory payroll tax forms
8.6 Process accounts payable and expense reimbursements

8.6.1 Process accounts payable (AP)

8.6.1.1 Verify AP pay file with PO vendor master file
8.6.1.2 Maintain/Manage electronic commerce
8.6.1.3 Audit invoices and key data in AP system
8.6.1.4 Approve payments
8.6.1.5 Process financial accruals and reversals
8.6.1.6 Process taxes
8.6.1.7 Research/Resolve exceptions
8.6.1.8 Process payments
8.6.1.9 Respond to AP inquires
8.6.1.10 Retain records
8.6.1.11 Adjust accounting records

8.6.2 Process expense reimbursements

8.6.2.1 Establish and communicate expense reimbursement policies and approval limits
8.6.2.2 Capture and report relevant tax data
8.6.2.3 Approve reimbursements and advances
8.6.2.4 Process reimbursements and advances
8.6.2.5 Manage personal accounts

8.7 Manage treasury operations

8.7.1 Manage treasury policies and procedures

8.7.1.1 Establish scope and governance of treasury operations
8.7.1.2 Establish and publish treasury policies
8.7.1.3 Develop treasury procedures
8.7.1.4 Monitor treasury procedures
8.7.1.5 Audit treasury procedures
8.7.1.6 Revise treasury procedures
8.7.1.7 Develop and confirm internal controls for treasury
8.7.1.8 Define system security requirements

8.7.2 Manage cash

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

8.7.3 Manage in-house bank accounts

8.7.3.1 Manage in-house bank accounts for subsidiaries
8.7.3.2 Manage and facilitate inter-company borrowing transactions
8.7.3.3 Manage centralized outgoing payments on behalf of subsidiaries

8.7.4 Manage debt and investment

8.7.4.1 Manage financial intermediary relationships
8.7.4.2 Manage liquidity
8.7.4.3 Manage issuer exposure
8.7.4.4 Process and oversee debt and investment transactions
8.7.4.5 Process and oversee foreign currency transactions
8.7.4.6 Produce debt and investment accounting transaction reports

8.7.5 Manage financial risks

8.7.5.1 Manage interest rate risk
8.7.5.2 Manage foreign exchange risk
8.7.5.3 Manage exposure risk
8.7.5.4 Develop and execute hedging transactions
8.7.5.5 Evaluate and refine hedging positions
8.7.5.6 Produce hedge accounting transactions and reports
8.7.5.7 Monitor credit

8.8 Manage internal controls

8.8.1 Establish internal controls policies and procedures

8.8.1.1 Establish board of directors and audit committee
8.8.1.2 Define and communicate code of ethics
8.8.1.3 Assign roles and responsibility for internal controls
8.8.1.4 Define business process objectives and risks
8.8.1.5 Define entity/unit risk tolerances

8.8.2 Operate controls and monitor compliance with internal controls policies and procedures

8.8.2.1 Design and implement control activities
8.8.2.2 Monitor control effectiveness
8.8.2.3 Remediate control deficiencies
8.8.2.4 Create compliance function
8.8.2.5 Operate compliance function
8.8.2.6 Implement and maintain controls-related enabling technologies and tools

8.8.3 Report on internal controls compliance

8.8.3.1 Report to external auditors
8.8.3.2 Report to regulators, share/debt-holders, securities exchanges, etc.
8.8.3.3 Report to third parties (e.g., business partners)
8.8.3.4 Report to internal management

8.9 Manage taxes
8.9.1 Develop tax strategy and plan
8.9.2 Process taxes
  8.9.2.1 Perform tax planning/strategy
  8.9.2.2 Prepare returns
  8.9.2.3 Prepare foreign taxes
  8.9.2.4 Calculate deferred taxes
  8.9.2.5 Account for taxes
  8.9.2.6 Monitor tax compliance
  8.9.2.7 Address tax inquiries
8.9.3 Manage international funds/consolidation
  8.9.3.1 Monitor international rates
  8.9.3.2 Manage transactions
  8.9.3.3 Monitor currency exposure/hedge currency
  8.9.3.4 Report results

9.0 Acquire, Construct, and Manage Property
9.1 Property design and construction
  9.1.1 Develop facility strategy
  9.1.2 Develop and construct sites
    9.1.3 Plan facility
      9.1.3.1 Design facility
      9.1.3.2 Analyze budget
      9.1.3.3 Select property
      9.1.3.4 Negotiate terms
      9.1.3.5 Manage construction/building
      9.1.3.6 Dispose of old facility
    9.1.4 Provide workspace and assets
      9.1.4.1 Acquire workspace and assets
      9.1.4.2 Change fit/form/function of workspace and assets
  9.2 Maintain workplace and assets
    9.2.1 Move people and assets
      9.2.1.1 Relocate people
      9.2.1.2 Relocate material and tools
    9.2.2 Repair workplace and assets
    9.2.3 Provide preventative maintenance for workplace and assets
    9.2.4 Manage security
  9.3 Dispose of workspace and assets
    9.3.1 Dispose of equipment
    9.3.2 Dispose of workspace
  9.4 Manage physical risk
  9.5 Manage capital asset

10.0 Manage Environmental Health and Safety (EHS)
10.1 Determine health, safety, and environment impacts
  10.1.1 Evaluate environmental impact of products, services, and operations
  10.1.2 Conduct health and safety and environmental audits
10.2 Develop and execute health, safety, and environmental program
  10.2.1 Identify regulatory and stakeholder requirements
  10.2.2 Assess future risks and opportunities
  10.2.3 Create EHS policy
  10.2.4 Record and manage EHS events
10.3 Train and educate employees
  10.3.1 Communicate EHS issues to stakeholders and provide support
10.4 Monitor and manage health, safety, and environmental management program
  10.4.1 Manage EHS costs and benefits
  10.4.2 Measure and report EHS performance
    10.4.2.1 Implement emergency response program
    10.4.2.2 Implement pollution prevention program
  10.4.3 Provide employees with EHS support
10.5 Ensure compliance with regulations
  10.5.1 Monitor compliance
  10.5.2 Perform compliance audit
  10.5.3 Comply with regulatory stakeholders requirements
10.6 Manage remediation efforts
  10.6.1 Create remediation plans
  10.6.2 Contact and confer with experts
  10.6.3 Identify/Dedicate resources
  10.6.4 Investigate legal aspects
  10.6.5 Investigate damage cause
  10.6.6 Amend or create policy

11.0 Manage External Relationships
11.1 Build investor relationships
  11.1.1 Plan, build, and manage lender relations
  11.1.2 Plan, build, and manage analyst relations
  11.1.3 Communicate with shareholders
11.2 Manage government and industry relationships
  11.2.1 Manage industry relations with government
  11.2.2 Manage relations with quasi-government bodies
  11.2.3 Manage relations with trade or industry groups
  11.2.4 Manage lobby activities
11.3 Manage relations with board of directors
  11.3.1 Report results
  11.3.2 Report audit findings
11.4 Manage legal and ethical issues
  11.4.1 Create ethics policies
  11.4.2 Manage corporate governance policies
  11.4.3 Develop and perform preventative law programs
  11.4.4 Ensure compliance
  11.4.5 Manage outside counsel
    11.4.5.1 Assess problem and determine work requirements
    11.4.5.2 Engage/Retain outside counsel if necessary
11.4.5.3 Receive strategy/budget
11.4.5.4 Receive work product and manage/monitor case and work performed
11.4.5.5 Process pay for legal services
11.4.5.6 Track legal activity/performance

11.6 Protect intellectual property
11.6.1 Manage copyrights and patents
11.6.2 Maintain intellectual property rights and restrictions
11.6.3 Administer licensing terms
11.6.4 Administer options

11.7 Resolve disputes and litigations
11.8 Provide legal advice/counseling
11.9 Negotiate and document agreements/contracts

11.5 Manage public relations program
11.5.1 Manage relations with global customers
11.5.2 Manage relations with trade and industry groups
11.5.3 Manage relations with global strategic suppliers
11.5.4 Manage community relations
11.5.5 Manage media relations
11.5.6 Promote political stability
11.5.7 Create press releases

12.0 Manage Knowledge, Improvement, and Change

12.1 Create and manage organizational performance strategy
12.1.1 Create enterprise measurement systems model
12.1.2 Measure process productivity
12.1.3 Measure cost effectiveness
12.1.4 Measure staff efficiency
12.1.5 Measure cycle time

12.2 Benchmark performance
12.2.1 Conduct performance assessments
12.2.2 Develop benchmarking capabilities
12.2.3 Conduct process benchmarking
12.2.4 Conduct competitive benchmarking
12.2.5 Conduct gap analysis to understand the need for and the degree of change needed
12.2.6 Establish need for change

12.3 Develop enterprise-wide knowledge management (KM) capability
12.3.1 Develop KM strategy
12.3.1.1 Develop governance model
12.3.1.2 Establish a central KM core group
12.3.1.3 Define roles and accountability of the core group versus operating units
12.3.1.4 Develop funding models
12.3.1.5 Identify links to key initiatives
12.3.1.6 Develop core KM methodologies
12.3.1.7 Assess IT needs and engage IT function
12.3.1.8 Develop training and communication plans
12.3.1.9 Develop change management approaches
12.3.1.10 Develop strategic measures and indicators
12.3.1.11 Assess maturity of existing KM initiatives

12.3.2 Identify and plan KM projects
12.3.2.1 Identify strategic opportunities to apply KM approach(es)
12.3.2.2 Identify KM requirements and objectives
12.3.2.3 Assess culture and readiness for KM approach
12.3.2.4 Identify appropriate KM methodologies (e.g., self-service, communities, transfer, etc.)
12.3.2.5 Create business case and obtain funding
12.3.2.6 Develop project measures and indicators

12.3.3 Design and launch KM projects
12.3.3.1 Design process for knowledge sharing, capture, and use
12.3.3.2 Define roles and resources
12.3.3.3 Identify specific IT requirements
12.3.3.4 Create training and communication plans
12.3.3.5 Develop change management plans
12.3.3.6 Design recognition and reward approaches
12.3.3.7 Design and plan launch of KM project
12.3.3.8 Deploy the KM project

12.3.4 Manage the KM project life cycle
12.3.4.1 Assess alignment with business goals
12.3.4.2 Evaluate impact of KM (strategy and projects) on measures and outcomes
12.3.4.3 Promote and sustain activity and involvement
12.3.4.4 Realign and refresh KM strategy and approaches

12.4 Manage change
12.4.1 Plan for change
12.4.1.1 Select a robust process improvement methodology
12.4.1.2 Assess readiness for change
12.4.1.3 Determine stakeholders
12.4.1.4 Engage/Identify champion
12.4.1.5 Form design team
12.4.1.6 Define scope
12.4.1.7 Understand current state
12.4.1.8 Define future state
12.4.1.9 Conduct risk analysis
12.4.1.10 Assess cultural issues
12.4.1.11 Establish accountability for change management
12.4.1.12 Identify barriers to change
12.4.1.13 Determine change enablers
12.4.1.14 Identify resources and develop measures

12.4.2 Design the change
12.4.2.1 Assess connection to other initiatives
12.4.2.2 Develop change management plans
| 12.4.2.3 | Develop training plan |
| 12.4.2.4 | Develop communication plan |
| 12.4.2.5 | Develop rewards/incentives plan |
| 12.4.2.6 | Establish metrics |
| 12.4.2.7 | Establish/Clarify new roles |
| 12.4.2.8 | Identify budget/roles |
| 12.4.3 | Implement change |
| 12.4.3.1 | Create commitment for improvement/ change |
| 12.4.3.2 | Reengineer business processes and systems |
| 12.4.3.3 | Support transition to new roles or exit strategies for incumbents |
| 12.4.3.4 | Monitor change |
| 12.4.4 | Sustain improvement |
| 12.4.4.1 | Monitor improved process performance |
| 12.4.4.2 | Capture and reuse lessons learned from change process |
| 12.4.4.3 | Take corrective action as necessary |

**THE APQC PROCESS CLASSIFICATION FRAMEWORK™**

**LOOKING FORWARD**

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**THE APQC PROCESS CLASSIFICATION FRAMEWORK™**

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