THE ELECTRIC UTILITIES PROCESS CLASSIFICATION FRAMEWORK

Based on the renowned Process Classification FrameworkSM (PCF), a taxonomy of cross-functional business processes intended to allow objective comparison of performance within and among organizations, and the support of IBM, this industry PCF enables more industry applicable content by outlining and defining processes and activities specific to the Electric Utilities industry. This allows organizations to choose the framework most relevant to the specific process improvement need, whether it be benchmarking within or across industries, business process management/re-engineering, or content management. The cross-industry PCF and industry PCFs are available on the APQC website at no charge. IBM provided the subject matter expertise and intellectual property to create the industry specific business process classification frameworks, as part of the IBM’s continuing leadership in the promotion of open standards to help organizations evaluate and measure business processes at an industry level.

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 FrameworkSM (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 15 years of creative use by thousands of organizations worldwide. The PCF provides the foundation for APQC’s Open Standards BenchmarkingSM database of performance metrics, the largest of its kind in the world. The PCF will continue to be enhanced as the database further develops definitions, processes, and measures. The PCF, associated measures, and definitions are available for download at no charge at www.apqc.org/osb. An online benchmarking portal for individual assessments is also available.

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 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 2008, APQC and IBM worked together to enhance the cross-industry PCF and to develop a number of industry-specific process classification frameworks.
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 and 2004 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.

ABOUT IBM
IBM works with its clients to develop new business designs and technical architectures that allow their businesses the flexibility required to compete in a global business landscape. The business is also adjusting its footprint toward emerging geographies, tapping into IBM’s double-digit growth, providing the technology infrastructure they need, and taking advantage of the talent pools provided to better service IBM’s clients. IBM’s major operations comprise a Global Technology Services segment; a Global Business Services segment; a Systems and Technology segment; a Software segment; and a Global Financing segment. For more information, visit: www.ibm.com/soa

THE ELECTRIC UTILITIES

RIGHTS AND PERMISSIONS
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UNDERSTANDING THE NUMBERING SCHEME
Beginning with Version 5.0.0, the PCF uses a numbering scheme that differs from previous versions. The cross-industry framework and the industry-specific frameworks collectively form a library of process
elements used in APQC’s Open Standards Benchmarking database. Each process element is referred to by two numbers: a number used to locate the content within that particular framework (in the format 1.2.3.4) and a serial number used to uniquely identify the process element across all of the various Open Standards Benchmarking frameworks (beginning with 10000).

For example, the process element “1.2 Develop business strategy (10015)” is uniquely identified by the serial number “10015” and the hierarchical reference number “1.2.” In industry-specific PCFs, any process element identified as “10015” will have the same scope and definition as a process element of the same number elsewhere, but may be labeled differently.

**INTERPRETING THE PCF**

- **Category:** The highest level within the PCF is indicated by whole numbers (e.g., 8.0 and 9.0)
- **Process Group:** Items with one decimal numbering (e.g., 8.1 and 9.1) are considered a process group.
- **Process:** Items with two decimal numberings (e.g., 8.1.1 and 9.1.2) are considered processes.
- **Activity:** Items with three decimal numbering (e.g. 8.3.1.1 and 9.1.1.1) are considered activities within a process.

The Electric Utilities PCF is based on the cross-industry PCF Version 5.0.0 released in April 2008.
1.0 Develop Vision and Strategy (10002)

1.1 Define the business concept and long-term vision (10014)

1.1.1 Assess the external environment (10017)
  1.1.1.1 Analyze and evaluate competition (10021)
  1.1.1.2 Identify economic trends (10022)
  1.1.1.3 Identify political and regulatory issues (10023)
  1.1.1.4 Assess new technology innovations (10024)
  1.1.1.5 Analyze demographics (10025)
  1.1.1.6 Identify social and cultural changes (10026)
  1.1.1.7 Identify ecological concerns (10027)

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

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

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

1.2 Develop business strategy (10015)

1.2.1 Develop overall mission statement (10037)
  1.2.1.1 Define current business (10044)
  1.2.1.2 Formulate mission (10045)
  1.2.1.3 Communicate mission (10046)

1.2.2 Evaluate strategic options to achieve the objectives (10038)
  1.2.2.1 Define strategic options (10047)
  1.2.2.2 Assess and analyse impact of each option (10048)

1.2.3 Select long-term business strategy (10039)

1.2.4 Coordinate and align functional and process strategies (10040)

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

1.2.6 Develop and set organizational goals (10042)

1.2.7 Formulate business unit strategies (10043)

1.2.8 Develop asset strategy (11255)

1.3 Manage strategic initiatives (10016)

1.3.1 Develop strategic initiatives (10057)

1.3.2 Evaluate strategic initiatives (10058)

1.3.3 Select strategic initiatives (10059)

1.3.4 Establish high-level measures (10060)

2.0 Develop and Manage Products and Services (10003)

2.1 Manage product and service portfolio (10061)

2.1.1 Evaluate performance of existing products/services against market opportunities (10063)

2.1.2 Define product/service development requirements (10064)
  2.1.2.1 Identify potential improvements to existing products and services (10068)
  2.1.2.2 Identify potential new products and services (10069)

2.1.3 Perform discovery research (10065)
  2.1.3.1 Identify new technologies (10070)
  2.1.3.2 Develop new technologies (10071)

2.1.3.3 Assess feasibility of integrating new leading technologies into product/service concepts (10072)

2.1.4 Confirm alignment of product/service concepts with business strategy (10066)
  2.1.4.1 Plan and develop cost and quality targets (10073)
  2.1.4.2 Prioritize and select new product/service concepts (10074)
  2.1.4.3 Specify development timing targets (10075)
  2.1.4.4 Plan for product/service offering modifications (10076)
2.1.5 Manage product and service life cycle (10067)
   2.1.5.1 Introduce new products/services (10077)
   2.1.5.2 Retire outdated products/services (10078)
   2.1.5.3 Identify and refine performance indicators (10079)

2.2 Develop products and services (10062)
   2.2.1 Design, build, and evaluate products and services (10080)
      2.2.1.1 Assign resources to product/service project (10083)
      2.2.1.2 Prepare high-level business case and technical assessment (10084)
      2.2.1.3 Develop product/service design specifications (10085)
      2.2.1.4 Document design specifications (10086)
      2.2.1.5 Conduct mandatory and elective external reviews (legal, regulatory, standards, internal) (10087)
      2.2.1.6 Build prototypes (10088)
      2.2.1.7 Eliminate quality and reliability problems (10089)
   2.2.2 Test market for new or revised products and services (10081)
      2.2.2.1 Prepare detailed market study (10093)
      2.2.2.2 Conduct customer tests and interviews (10094)
      2.2.2.3 Finalize product/service characteristics and business cases (10095)
      2.2.2.4 Finalize technical requirements (10096)
      2.2.2.5 Identify requirements for changes to manufacturing/delivery processes (10097)
   2.2.3 Prepare for production (10082)
      2.2.3.1 Develop and test prototype production and/or service delivery process (10098)
      2.2.3.2 Design and obtain necessary materials and equipment (10099)
      2.2.3.3 Install and validate production process or methodology (10100)

3.0 Market and Sell Products and Services (10004)

3.1 Understand markets, customers and capabilities (10101)
   3.1.1 Perform customer and market intelligence analysis (10106)
      3.1.1.1 Conduct customer and market research (10108)
      3.1.1.2 Identify market segments (10109)
      3.1.1.3 Analyze market and industry trends (10110)
      3.1.1.4 Analyze competing organizations, competitive/substitute products (10111)
      3.1.1.5 Evaluate existing products/brands (10112)
      3.1.1.6 Assess internal and external business environment (10113)
   3.1.2 Evaluate and prioritize market opportunities (10107)
      3.1.2.1 Quantify market opportunities (10116)
      3.1.2.2 Determine target segments (10117)
      3.1.2.3 Prioritize opportunities consistent with capabilities and overall business strategy (10118)
      3.1.2.4 Validate opportunities (10119)
   3.1.3 Define marketing strategy (10102)
      3.1.3.1 Define offering and customer’s value proposition (11168)
      3.1.3.2 Develop value proposition including brand positioning for target segments (11170)
      3.1.3.3 Validate value proposition and shape offering to optimize with target segments (11171)
      3.1.3.4 Develop new branding (11172)

3.2 Develop sales strategy (10103)
   3.2.1 Gather current and historic order information (10134)
   3.2.2 Analyze sales trends and patterns (10135)
   3.2.3 Generate sales forecast (10136)
   3.2.4 Analyze historical and planned promotions and events (10137)
   3.2.5 Identify alliance opportunities (10138)
   3.2.6 Design alliance programs and methods for selecting and managing relationships (10139)
   3.2.7 Select alliances (10140)
   3.2.8 Develop partner and alliance management strategies (10141)
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#### 3.4.1 Establish goals, objectives and metrics for products by channels/segments (10148)

#### 3.4.2 Establish marketing budgets (10149)

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- 3.4.3.1 Define media objectives (10158)
- 3.4.3.2 Develop marketing messages (10159)
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- 3.4.3.5 Develop and execute advertising (10162)
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- 3.4.4.4 Refine pricing as needed (10166)

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- 3.4.5.3 Execute promotional activities (10169)
- 3.4.5.4 Evaluate promotional performance metrics (10170)
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- 3.5.3.4 Record outcome of sales process (10193)

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- 3.5.4.2 Collect and maintain customer account information (10195)
- 3.5.4.3 Determine stock availability (10196)
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#### 3.6.4 Evaluate & manage deal performance (11260)

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   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 manufacturing capital expense policies (10232)
   4.1.1.5 Define capacities (10233)
   4.1.1.6 Define production network and supply constraints (10234)

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   4.1.2.2 Collaborate with customers (10236)
   4.1.2.3 Develop consensus forecast (10237)
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   4.1.2.7 Measure forecast accuracy (10241)

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   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)

4.1.4 Create and manage master production schedule (10224)
   4.1.4.1 Generate site level plan (10247)
   4.1.4.2 Manage work-in-progress inventory (10248)
   4.1.4.3 Collaborate with suppliers (10249)
   4.1.4.4 Generate and execute site schedule (10250)

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   4.1.5.2 Maintain master data (10252)
   4.1.5.3 Determine finished goods inventory requirements at destination (10253)
   4.1.5.4 Calculate requirements as destination (10254)
   4.1.5.5 Calculate consolidation at source (10255)
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   4.1.5.7 Manage requirements for partners (10257)
   4.1.5.8 Calculate destination dispatch plan (10258)
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   4.1.5.11 Manage partner load plan (10261)
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   4.1.6.1 Establish distribution center layout constraints (10267)

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   4.1.8.5 Analyze performance benchmark gaps (10274)
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   4.1.9.3 Communicate quality specifications (10373)

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   4.2.1.2 Clarify purchasing requirements (10282)
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   4.2.1.5 Analyze company’s spend profile (10285)
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   4.2.2.1 Select suppliers (10288)
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  - 11.4.5.2 Engage/retain outside counsel if necessary (11057)
  - 11.4.5.3 Receive strategy/budget (11058)
  - 11.4.5.4 Receive work product and manage monitor case and work performed (11059)
  - 11.4.5.5 Process pay for legal services (11060)
  - 11.4.5.6 Track legal activity/performance (11061)

- 11.4.6 Protect intellectual property (11049)
  - 11.4.6.1 Manage copyrights and patents (11062)
  - 11.4.6.2 Maintain intellectual property rights and restrictions (11063)
  - 11.4.6.3 Administer licensing terms (11064)
  - 11.4.6.4 Administer options (11065)

- 11.4.7 Resolve disputes and litigations (11050)

- 11.4.8 Provide legal advice/counseling (11051)

- 11.4.9 Negotiate and document agreements/contracts (11052)

11.5 **Manage public relations program (11014)**

- 11.5.1 Manage community relations (11066)
- 11.5.2 Manage media relations (11067)
- 11.5.3 Promote political stability (11068)
- 11.5.4 Create press releases (11069)
- 11.5.5 Issue press releases (11070)
12.0 Manage Knowledge, Improvement, and Change (10013)

12.1 Create and manage organizational performance strategy (11071)
  12.1.1 Create enterprise measurement systems model (11075)
    12.1.1.1 Establish performance measures (11080)
    12.1.1.2 Establish performance monitoring frequency (11081)
    12.1.1.3 Set performance targets (11082)
  12.1.2 Measure process productivity (11076)
  12.1.3 Measure cost effectiveness (11077)
  12.1.4 Measure staff efficiency (11078)
  12.1.5 Measure cycle time (11079)

12.2 Benchmark performance (11072)
  12.2.1 Conduct performance assessments (11083)
  12.2.2 Develop benchmarking capabilities (11084)
  12.2.3 Conduct process benchmarking (11085)
    12.2.3.1 Compile & update list of processes & organizations to benchmark (11089)
    12.2.3.2 Establish benchmarks (11090)
    12.2.3.3 Measure performance against benchmarks (11091)
  12.2.4 Conduct competitive benchmarking (11086)
    12.2.4.1 Compile & update list of processes & organizations to benchmark (11092)
    12.2.4.2 Establish benchmarks (11093)
    12.2.4.3 Measure performance against benchmarks (11094)
  12.2.5 Conduct gap analysis to understand the need for and the degree of change needed (11087)
  12.2.6 Establish need for change (11088)

12.3 Develop enterprise-wide knowledge management (KM) capability (11073)
  12.3.1 Develop KM strategy (11095)
    12.3.1.1 Develop governance model (11100)
    12.3.1.2 Establish a central KM core group (11101)
    12.3.1.3 Define roles and accountability of the core group versus operating units (11102)
    12.3.1.4 Develop funding models (11103)
    12.3.1.5 Identify links to key initiatives (11104)
    12.3.1.6 Develop core KM methodologies (11105)
    12.3.1.7 Assess IT needs and engage IT function (11106)
    12.3.1.8 Develop training and communication plans (11107)
    12.3.1.9 Develop change management approaches (11108)
    12.3.1.10 Develop strategic measures and indicators (11109)

12.3.2 Assess knowledge management capabilities (11096)
  12.3.2.1 Assess maturity of existing KM initiatives (11110)
  12.3.2.2 Evaluate existing knowledge management approaches (11111)
  12.3.2.3 Identify gaps and needs (11112)
  12.3.2.4 Enhance/modify existing knowledge management approaches (11113)
  12.3.2.5 Develop new knowledge management approaches (11114)
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  12.3.3.1 Identify strategic opportunities to apply KM approach(es) (11116)
  12.3.3.2 Identify KM requirements and objectives (11117)
  12.3.3.3 Assess culture and readiness for KM approach (11118)
  12.3.3.4 Identify appropriate KM methodologies (e.g., self-service, communities, transfer, etc.) (11119)
  12.3.3.5 Create business case and obtain funding (11120)
  12.3.3.6 Develop project measures and indicators (11121)

12.3.4 Design and launch KM projects (11098)
  12.3.4.1 Design process for knowledge sharing, capture, and use (11122)
  12.3.4.2 Define roles and resources (11123)
  12.3.4.3 Identify specific IT requirements (11124)
  12.3.4.4 Create training and communication plans (11125)
  12.3.4.5 Develop change management plans (11126)
  12.3.4.6 Design recognition and reward approaches (11127)
  12.3.4.7 Design and plan launch of KM project (11128)
  12.3.4.8 Deploy the KM project (11129)

12.3.5 Manage the KM project life cycle (11099)
  12.3.5.1 Assess alignment with business goals (11130)
  12.3.5.2 Evaluate impact of KM (strategy and projects) on measures and outcomes (11131)
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