OPENREFERENCE

TAPPING THE MINDS OF THE BUSINESS COMMUNITY

METRICS

OPENREFERENCE

TAPPING THE MINDS OF THE BUSINESS COMMUNITY

THE OPENREFERENCE INITIATIVE

We are a global community of volunteers dedicated to developing and sharing a standard language to describe business processes, metrics, and other business terminology. We believe in sharing knowledge and findings openly so that anyone can build on our work.

THIS IS OPEN KNOWLEDGE

Knowledge is open if anyone is free to access, use, modify, and share it — subject to measures that preserve provenance and openness:

- Open Knowledge is accessible to everyone free of charge
- Open Knowledge is published in all its details
- Open Knowledge is developed by volunteers through due process
- Open Knowledge permits unlimited usage and redistribution when attributions are made

OpenReference is knowledge licensed under the Creative Commons Attribution Share Alike 4.0 International License.

(c) (i) (2) **Folding** Instructions Participate: ORwiki.org dev.ORwiki.org

DP21 -DP22 -**DP Dependability** DP2 -DP23 -DP24 -DP25 -RS31 -RS32 -RS3 -RS33 -**RS** Responsiveness RS14 -RS21 -RS2 -RS22 -CO21 -CO2 Customer Acquisition **CO Cost** CO22 -Costs CO23 -AE31 -**AE3** -AE32 -**AE Asset Efficiency** AE33 -AE41 -AE4 -AE42 -

SALES & SUPPORT **OPERATIONS**

QUICK REFERENCE CARD 2020 EDITION









OPENREFERENCE

TAPPING THE MINDS OF THE BUSINESS COMMUNITY

PROCESSES

OPENREFERENCE

TAPPING THE MINDS OF THE BUSINESS COMMUNITY

	F Pla			S Sell				C Contract				A Assist			
P1 Plan Sales & Support Operations	P2 Plan Sales	P3 Plan Contract	P4 Plan Assist	S1 Sell-On- Standard Terms	S2 Sell-By- Proposal	S3 Sell Custom Solution	S4 Sell Renewal	C1 Contract-On- Standard Terms	C2 Contract-By- Proposal	C3 Contract Custom Solution	C4 Contract Renewal	A1 Assist-With- Inquiry	A2 Assist-With- Claim	A3 Assist-With- Custom Solution	A4 Assist-With- Advisory
P101	P201	P301	P401	\$101	S201	S301	S401 Initiate Renewal	C101 Receive Request	C201 Receive Request	C301	C401 Receive Request	A101 Receive Inquiry	A201 Receive Claim	A301	D401 Identify Advisory
P102	P202	P302	P402	S102	S202	S302	S402 Schedule Renewal	C102 Create Pricelist	C202 Initiate Proposal	C302	C402 Develop Renewal	A102 Route Inquiry	A202 Assign	A302	D402 Initiate Advisory
P103	P203	P303	P403	S103	S203	S303	S403 Notify Customer	C103 Publish Pricelist	C203 Develop Proposal	C303	C403 Present Renewal	A103 Identify Solution	A203 Investigate	A303	D403 Develop Action Plan
P104	P204	P304	P404	S104	S204	S304	S404 Refresh Customer Needs	C104 Negotiate	C204 Obtain Proposals	C304	C404 Negotiate	A104 Present Solution	A204 Determine Action	A304	A404 Implement Action Plan
P105	P205	P305	P405	S105	S205	S305	S405 Develop Solution	C105 Obtain Signatures	C205 Submit Proposal	C305	C405 Obtain Signatures	A105 Transfer	A205 Propose Action	A305	A405 Publish Advisory
P106				S106	S206	S306	S406 Present Solution	C106 Release Contract	C206 Refine & Negotiate	C306	C406 Update Contract	A106 Distribute Solution	A206 Trigger Action	A306	A406 Monitor Effectiveness
P107				S107	S207	S307	S407 Review Feedback		C207 Obtain Signatures	C307		A107 Close Inquiry	A207 Settle Claim	A307	A407 End Advisory
					S208	S308			C208 Release Contract	C308			A208 Close Claim	A308	
						S309				C309				A309	