



# **THE LEADING PRACTICE MEASUREMENT & REPORTING CONTENT #LEAD-ES20012BC**

A M&R Ontology & -Semantic Description, Views, Stakeholders and Concerns

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# Overview of the Measurement & Reporting Reference Content

## Introduction

The LEADIng Practice Measurement & Reporting Reference Content provides measurement & reporting (hereafter: M&R) ontology with its specific M&R descriptions, semantic relations and correlations. It is based on a collection of best and leading practice around how to work with measurements/reporting within enterprise modelling, enterprise engineering and enterprise architecture disciplines. The M&R Reference Content is therefore an essential part for any practitioner working with and around M&R aspects. It provides a structural way of thinking, working, modelling, implementation and governance around M&R definitions, and how M&R is applied within business functions, services, processes as well as applications. The M&R Reference Content also provides an overview of the key M&R aspects of the organisation and how they relate to the various business aspects, e.g. owners, competencies, processes, services, as well as requirements. The M&R Reference Content therefore provides a way of analysing, appraising, approximating, assessing, and capturing M&R related objects to enable innovation and transformation.

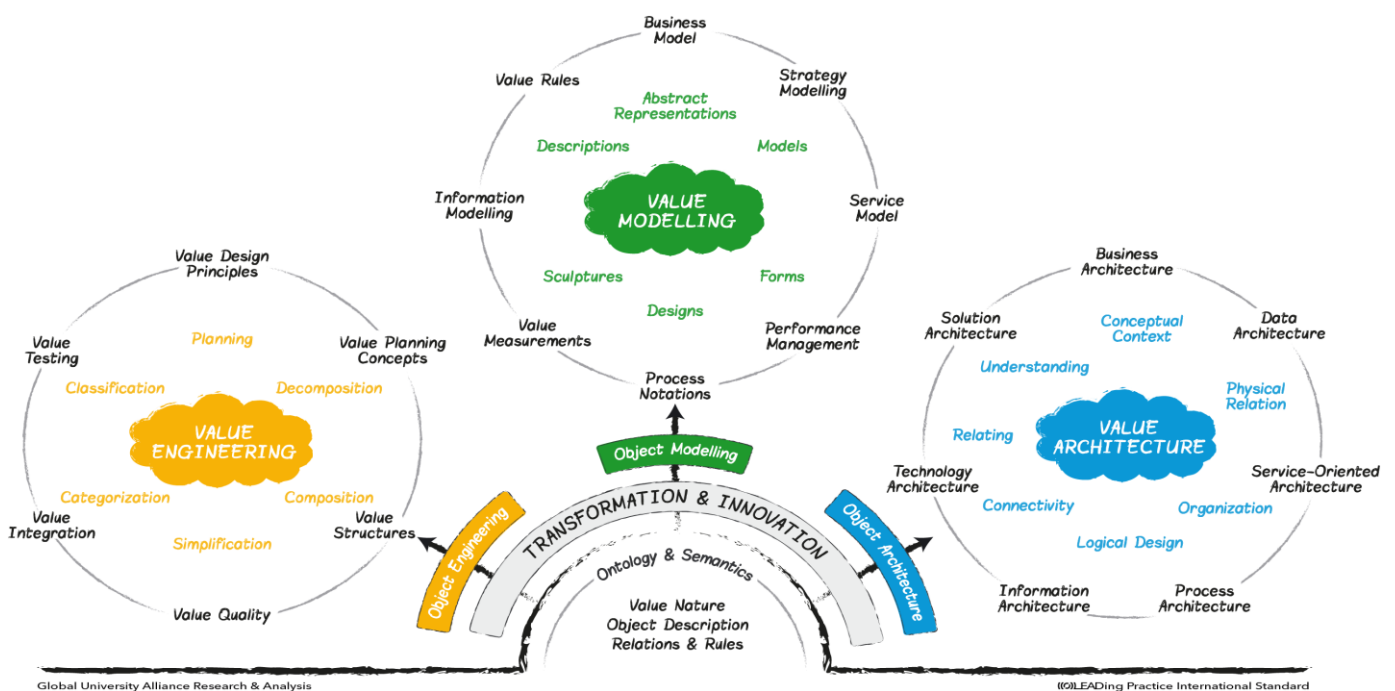


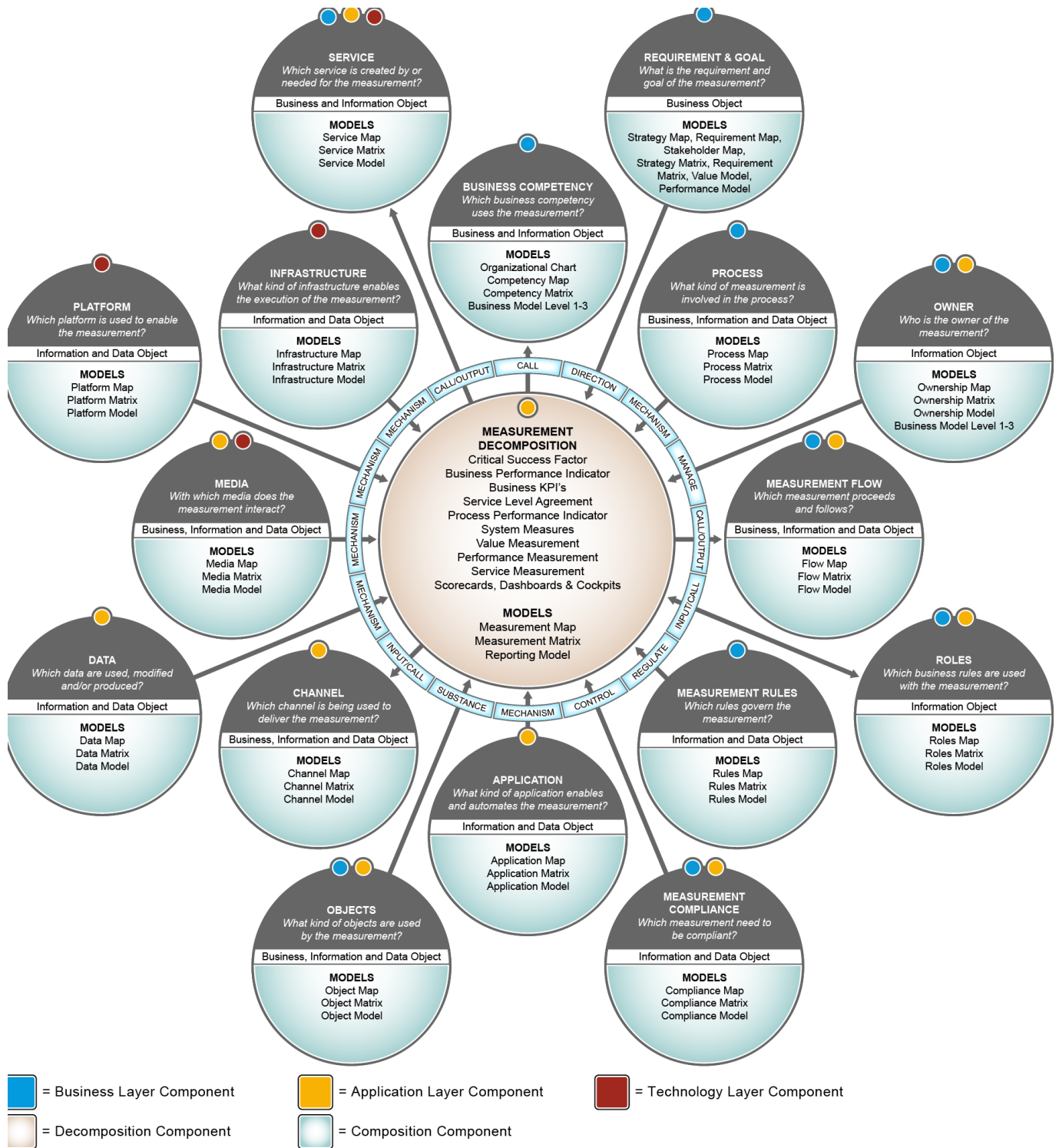
Figure 1: The Measurement & Reporting Objects are part of the many semantic relations between the enterprise engineering, enterprise modelling, and enterprise reporting architecture enabling transformation and innovation.

## **Why to use the Measurement & Reporting Content?**

- It provides M&R ontology with its specific M&R descriptions, semantic relations and correlations.
- It defines how to organize and structure the viewpoints and objects associated with M&R development and M&R management.
- It offers guiding principles to establish a common practice for creating, interpreting, analysing and using M&R objects within a particular domain and/or layers of an enterprise or an organization.
- Using the M&R Content is done through a set of principles e.g. how and where can the M&R objects be related (and where not).
- It is vendor neutral and agnostic and can therefore be used with most existing frameworks, methods and or approaches that have any of the meta-objects mentioned in this document.
- It has a structured repeatable pattern for M&R related objects, structures as well as artefacts (the basis of our standards). The definition of a pattern used here is the description of the repeatable and mostly used/generic specifications and relations of a topic, not all theoretically possible specifications or relations.
- It has M&R standards that increase the level of re-usability and replication.
- It has a fully integrated and standardized M&R maps, matrices and models that allow for advanced ways of thinking, working, modelling, implementation and governance of the M&R.

## **M&R related Meta-Object Ontology and Main Characteristics**

Using ontology principles to understand the very nature, the basic categories, as well as using semantic principles to identify which parts relate or should relate, exposed sixteen areas that together provide a starting point that can be used to guide the analysis, decomposition, composition and construction of measurements and their related reports. The Sixteen main areas are presented in figure 2 below.



LEADing Practice Decomposition & Composition Method

Source: www.LEADingPractice.com

Figure 2 The 16 LEAD Measurement Decomposition and Composition objects

In order to have a structured way of thinking, working and modelling within the Measurement & Reporting Reference Content, the following three main properties characterizing the meta-object relevant to modelling and architecture principles are applied:

- **Identity:** the decomposed measurement & reporting objects that distinguishes them from other meta-object areas.
- **State:** describes the purpose of the composed object.
- **Behaviour:** describes how the decomposed or composed objects can be used with other meta-object's relations across other modelling disciplines and architectural layers.

## M&R Object(s) - Definition

In the context of LEADing Practice Modelling principles, Performance Measurements typically refers to either - the process of establishing the performance magnitude of some of the defined attributes of an object relative to some unit of defined performance measurements.

A Performance Measurement should be tracked, usually on an on-going basis, to determine success or alignment with objectives and goals. Performance Measures are used in companies in the area of organisational performance goals and thereby measures (e.g. BPI, KPI and PPIs), personalized performance metrics (KPIs) and benchmarks that drive the financial and operational success of the company. In the context of LEAD Meta Modelling principles, a performance measurement helps an organisation define and measure progress toward strategic, tactical or operational performance goals.

In terms of the LEAD way of thinking, to distinguish between other measurement metrics and performance metrics, organisations use the term Performance Measurements e.g. BPI, KPI and PPI.

Organisations measure their performance indicators for numerous reasons. Here are just a few:

- **Improvement:** By tracking performance, companies can spot—and promptly address—problems such as declining customer loyalty, flattening profits, or defections of talented employees.
- **Planning and forecasting:** Performance measurement serves as a progress check—enabling organisations to determine whether they're meeting their goals and whether they need to revise their budgets and forecasts.
- **Competition:** When companies compare their performance against their rivals' and against industry benchmarks, they can identify weak areas and address them to sharpen their competitive edge.
- **Reward:** By knowing how much employees have excelled in achieving goals, managers can distribute performance-based incentives and rewards fairly to their direct reports.
- **Regulatory and standards compliance:** Many companies measure performance in order to comply with government regulations (such as antipollution laws) or international standards (for instance, ISO 9000).

## Some Important Modelling Aspects

In the LEAD M&R Reference Framework Performance Measurements can be either quantitative or qualitative. Quantitative Performance Measurements are likely to be based on system collected statistics such as number of users whereas qualitative Performance Measurements may be based on more subjective measurements from user interviews and surveys. In some instances a more

balanced view might be obtained by grouping and/or aggregating quantitative and qualitative based Performance Measurements. Such an sorting according to accountability, groups and levels often lead to the identification of potential improvements (innovation and transformation); and as a consequence, performance indicators should routinely associated with 'performance innovation and transformation initiatives'. Performance Measurements are ways to periodically assess the performances of organisations, business units, and their division, departments and employees. Accordingly, Performance Measurements are most commonly defined in a way that is understandable, meaningful, and measurable. They are rarely defined in such a way such that their fulfilment would be hampered by factors seen as non-controllable by the organisations or individuals responsible. Such Performance Measurements are usually to soft and not fully considered Performance Measurements and are therefore ignored by organisation. In order to be evaluated, BPIs are linked to the goals (SBOs) and objectives (CSFs) of the organisation and then to the KPIs and connected to the PPIs, so that the M&R of the performance measure can be assessed as meeting expectations or not. Whatever Performance Measurements are selected, they must reflect the organisation's goals (SBOs), they must be key to its success, and they must be quantifiable (measurable). Strategic Performance Measurements usually are long-term considerations. The definition of what they are and how they are measured do not change often. The goals for a particular Performance Measurements may change as the organisation's goals change, or as it gets closer to achieving a goal. Therefore we can define Performance Measurements as quantifiable measurements, agreed to beforehand, that reflect the critical success factors (CSFs) of an organisation. Of course they differ depending on the organisation.

If Performance Measurements are wished to be used for system measurements, they are called System Indicators. Such system indicators measuring the BPI, KPI and PPI or parts of a Performance Indicator should be:

- Quantitative indicators which can be presented as a number.
- Practical indicators that interface with existing company tasks and activities.
- Directional indicators mapped to the goals and objectives, specifying whether an organisation is getting better or not.
- Actionable indicators are sufficiently in an organisation's control to affect change (innovation and/or transformation).
- Financial indicators used in performance measurement and when looking at an operating index.

The LEAD way of working a BPI, KPI and PPI can follow the SMART criteria. This means the measure has a Specific purpose for the business, it is Measurable to really get a M&R of the defined and specified Performance Measurements, the defined norms have to be Achievable, the improvement of a KPI and or PPI has to be Relevant to the success of the organisation, and finally it must be Time phased, which means the M&R or outcomes are shown for a predefined and relevant period.



## Typical Performance Measurements Modelling Problems and Challenges

- In practice, overseeing Performance Measurements can prove expensive or difficult for organisations. Some indicators such as staff morale may be impossible to quantify. As such dubious Performance Measurements can be adopted that can be used as a rough guide rather than a precise benchmark.
- Another serious issue in practice is that once a measure is created, it becomes difficult to adjust to changing needs as historical comparisons will be lost. As such measures are kept even if of dubious relevance, because history does exist.
- Once an organisation starts mapping their Performance Measurements many find it to much work to map them to the relevant accountability level, thereby having no understanding which KPI supports strategic, tactical or operational performance or initiatives.
- Most organisations don't link their categorized Performance Measurements with their existing competency and business function and responsible, which fundamentally keeps the organisation from a continuous improvement approach and thereby possibility.
- When an organisation does not define association, relation and reporting between the Performance Measurements, the organisation will be derived from linking their performance approach with their reporting approach.
- Many organisations don't map their BPIs to the SBOs & CSFs and then to the KPIs and from there to their PPIs and therefore all they have is their performance. This terminates the possible links to the goals, direction and objective of one's organisation.
- Comparisons between different organisations are often difficult as they depend on specific in-house M&R, and what is critical for them as well practices and policies.
- Many things are measurable. That does not make them key to the organisation's success. In selecting Performance Measurements, it is critical to limit them to those factors that are essential to the organisation reaching its goals.
- Most organisations we meet have no BPIs to many KPIs and very little PPIs. It is also important to keep the number right and in balance in order to keep everyone's attention focused on achieving the defined performance results.

Summarized; what we have learned about Performance Measurements definition and set up, using the LEADIng Practice and approach to choose and define Performance Measurements one would do the following steps:

- 1) Identify the organisational SBOs,
- 2) Define the CSFs that are important to achieve the classified SBOs.
- 3) Then map the BPIs to the CSFs

- 4) Select and identify the right KPIs to the CSFs , and identify the accountability level to the KPIs (strategic, tactical or operational)
- 5) Group them into competency and business function (groups and subjects) e.g. sales, forecast, account management etc
- 6) identify the responsible e.g. CMO, Sales VP, Client Responsible etc.
- 7) Define associated and relation to each other e.g. what proceeds and follows
- 8) Identifying process performance indicators to the KPIs
- 9) Select the wanted business process (BP) to be measured.
- 10) Define performance requirements for the BPs.
- 11) Choose quantitative/qualitative measurement of the output/results and comparison with the KPI goals.
- 12) Sort BPI, KPI and PPI by multiple levels of reporting and specific report
- 13) Classify if the KPI and PPIs is quantitative or qualitative

Once the above steps are done one could further more:

- 14) Apply them to the organisations different performance management framework such as the balanced scorecard, BPM framework, LEAN approach et cetera.
- 15) Categorize the above according to M&R drivers (SBOs & CSFs) and or performance drivers (BPIs, KPIs & PPIs) in order to develop a M&R Management framework and Performance Management framework for the organisation.
- 16) Automate as many performance measurements in systems e.g. applications and data as possible

## **M&R Object(s) - Decomposition**

M&R can be **decomposed** into the following objects:

- Critical Success Factor,
- Business Performance Indicator
- Business KPI's
- Service Level Agreement
- Process Performance Indicator
- System Measures
- M&R Measurement
- Performance Measurement
- Service Measurement

- Scorecards
- Dashboards & Cockpits

Figure 3 below shows the decomposition objects of M&R:

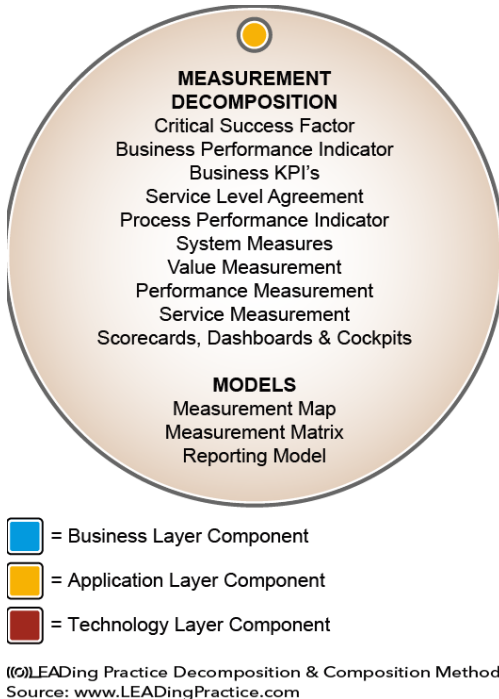


Figure 3: Components of an Initial Measurement & Reporting Decomposition

## M&R Object(s) – Overview all M&R related Meta-objects

A list of which objects are most relevant to the Measurement & Reporting Reference Content is provided below:

<b>Forces (external/ internal)</b>	An external or internal factor which pushes some aspect of an enterprise in a specific direction.
<b>Driver</b>	An external or internal factor which influences and pushes some aspect of an enterprise in a specific direction.
<b>Vision</b>	The desired future state of the enterprise, an imagination of the future aspirational state of how the enterprise could or should be like without regard the how this will be achieved.
<b>Mission</b>	The purpose and nature of the enterprise.
<b>Strategy (Strategic Business Objective)</b>	The direction and ends which the enterprise seeks, as well as the means and methods by which these ends will be attained.
<b>Goal (e.g. business, application, technology)</b>	A desired result considered a part of the organizational direction, aims, targets, and aspirations.

<b>Objective (Critical Success Factor)</b>	Time-bounded milestones to measure and gauge the progress towards a strategy or goal.
<b>Performance Indicator (business) Tier: Strategic, Tactical, or Operational</b>	The classification of the metrics used by an enterprise as being Strategic, Tactical, or Operational in nature.
<b>Service Measurement (Level Agreements)</b>	The basis by which the enterprise evaluates or estimates the nature, quality, ability, or extent of the services. The commitments of a service are assessed.
<b>Process Measurement (PPI)</b>	The basis by which the enterprise evaluates or estimates the nature, quality, ability, extent, as to whether a process or activity is performing as desired.
<b>System Measurement</b>	Measures that are defined and implementable within an application.
<b>Value Indicator (Critical Success Factor)</b>	Any of a series of metrics used by an enterprise, to indicate its overall ability to achieve its mission.
<b>Value Driver</b>	A Categorization of the factors that advance action and principles toward a specific direction.
<b>Value Expectation</b>	The anticipated benefits that are of worth, importance, and significance to a specific stakeholder.
<b>Timing</b>	A plan, schedule, or arrangement when (something) should happen or be done or to take place.
<b>Report</b>	The exposure, description, and portrayal of information, about the status, direction or execution of work within the functions, services, processes, and resources of the enterprise.
<b>Performance Expectation</b>	The (desire for the) manner in which, or the efficiency with which, something reacts or fulfils its intended purpose as anticipated by a specific stakeholder.
<b>Performance Driver</b>	Those variables that are critical to develop the means and overall presentation of an enterprise.
<b>Service Tier (strategic, tactical, operational)</b>	A classification of services which are ranked according to their tiers they belong to.
<b>Business Area</b>	The highest level meaningful grouping of the activities of the enterprise.
<b>Business Group</b>	An aggregation within an enterprise that is within a Business Area.
<b>Cost</b>	An amount that has to be paid or given up to obtain the use or access to something.
<b>Revenue</b>	The realised income of an enterprise or part thereof.
<b>Product</b>	A result and output generated by the enterprise. It has a combination of tangible and intangible attributes (features, functions, usage).

<b>Business Owner</b>	A role performed by an actor with the rights, rules, competencies, and capabilities to take decisions for the part of enterprise for which stewardship responsibilities have been assigned.
<b>Service Area</b>	A high level, conceptual, aggregation of provided services.
<b>Service Group</b>	An aggregation of services based on a common factor or domain that exist within a common service area.
<b>Service Owner</b>	A role performed by an actor with the rights, rules, competencies and capabilities to take decisions for the business service for which accountability has been assigned.
<b>Process Area</b>	The highest level of an abstract categorization of processes.
<b>Process Group</b>	A categorization and collection of processes into common groups.
<b>Process Owner</b>	A role performed by an actor with the fitting rights, competencies, and capabilities to take decisions to ensure work is performed.
<b>Application Owner</b>	A role performed by an actor with the rights, rules, competencies and capabilities to take decisions for the application for which accountability has been assigned.
<b>Data Owner</b>	A role performed by an actor with the rights, competencies, and capabilities to take decisions about the aspects of data for which stewardship responsibilities have been assigned.
<b>Platform Owner</b>	A role performed by an actor with the fitting rights, competencies, and capabilities to take decisions about the platform devices for which stewardship responsibilities have been assigned.
<b>Infrastructure Owner</b>	A role performed by an actor with the rights, competencies, and capabilities to take decisions about the components within the infrastructure for which stewardship responsibilities have been assigned.

Figure 4: The 35 Measurement & Reporting related meta-objects.

## M&R Objects and their Usage in the M&R Templates

The Measurement & Reporting Reference Content templates consist of both M&R maps, M&R matrices and M&R models that capture the relevant M&R meta-objects. Each of these is based on a specific view to a related M&R topic and thereby with particular stakeholder concern, modelling and architecture rules related to enable M&R identification, creation, and realization in achieving the outlined needs and wants. For this the M&R Reference Content templates identify the relevant stakeholders, their requirements and concerns, M&R object descriptions and their modelling and architecture rational, the corresponding rules, architecture views and viewpoints; each of these artefacts are built as templates to support a particular need and want.

Fully integrated and standardized M&R templates enable the strategist, M&R expert/practitioner or architect (M&R or business architect) to work with the relevant M&R meta-objects throughout all the architectural layers (business, application and technology). Advanced M&R modelling and relating the relevant objects throughout the layers is one of the strengths of the Measurement & Reporting Reference Content. Not only are the M&R objects governed by its connection modelling rules, but also how and where the M&R templates interlink and share common objects is defined and standardized.

		<b>LEAD Templates &amp; LEAD Meta Object Relations: Measurement &amp; Reporting</b>	
			<b>Meas. &amp; Rep. (MR)</b>
<b>MEASUREMENT &amp; REPORTING META-OBJECTS</b>	<b>Drivers (external &amp; internal)</b>		2
	<b>Objective</b>		1,2,3
	<b>Value Indicator (Critical Success Factor)</b>		2,3
	<b>Value Driver</b>		1,2,3
	<b>Value Expectation</b>		2
	<b>Performance Driver</b>		1,2,3
	<b>Performance Indicator</b>		1,2,3
	<b>Performance Expectation</b>		1,2
	<b>Business measure</b>		1,2,3
	<b>Timing</b>		1,2,3
	<b>Quality</b>		2,3
	<b>Risk</b>		2,3
	<b>Reporting</b>		1,2,3
	<b>Business Area</b>		2,3
	<b>Business Group</b>		2,3
	<b>Location</b>		1,2,3
	<b>Contract</b>		2,3
	<b>Product</b>		2,3
	<b>Business Owner</b>		2,3
	<b>Service Area</b>		2,3
	<b>Service Group</b>		2,3
	<b>Service Measurement (SPI &amp; SLA)</b>		1,2,3
	<b>Service Owner</b>		2,3
	<b>Process Area (categorization)</b>		2,3
	<b>Process Group (categorization)</b>		2,3
	<b>Process Measurement (PPI)</b>		1,2,3
	<b>Process Owner</b>		2,3
	<b>System Measurements</b>		1,2,3
	<b>Application/System Reports</b>		1,2,3
	<b>Application/System Owner</b>		2,3
<b>Data Owner</b>		2,3	
<b>Platform Owner</b>		2,3	
<b>Infrastructure Owner</b>		2,3	

LEADing Practice M&R Reference Content ((#LEAD-ES20012BC)

Legenda: 1 = Map 2 = Matrix 3 = Model

(\*) For a full overview of the M&R LEAD Templates & LEAD Meta Object Relations: see Appendix 1.

*Figure 5: The M&R objects and their Maps, Matrices & Models.*

The M&R templates are maps, matrices and models. The maps are often in the form of a list and are a representation of the decomposed M&R objects, while the matrices are the continuity of, and interconnection between, a map (a representation of decomposed objects) and a representation of interconnected and related objects. Models often show the graphical representation of the relations and connections. The maps, matrices and models are used in the decomposition and composition work within and throughout the layers. The specific templates do not only show which objects are within what template, thereby specifying if it is a map, matrix or model, it furthermore shows where the object of one template can be reused in another template.

## Way of Thinking around Measurement & Reporting aspects

The Way of Thinking around M&R disciplines is essential, as it is the basis of the guiding principles around the Measurement & Reporting Reference Content. It provides a structural concept for the M&R specification around M&R definitions e.g. wants, needs, identification, goals, issues and problems. The way of thinking around M&R furthermore postulates about what ought to be, including specifying the right M&R abstraction level. The way of M&R thinking does the following: it analyses, appraises, approximates, assesses and captures all relevant aspects of the M&R's objects and artefacts; their idea, design, plan, scheme and structure. This is all done in order to understand the underlying M&R concept, thought, view, vision as well as perspective, philosophy and belief.

The purpose of having a common way of thinking around M&R concepts is to define how to organize and structure the viewpoints and M&R objects associated with the various disciplines e.g. business, process, service, application, platform and infrastructure, applying the concepts. The M&R reference concept has proven to help companies with some of the most common and complex advanced M&R principles, dilemmas and challenges that companies have to confront today. This includes, but is not limited to:

- The measurement & reporting definitions used in the organisation and their content; most large organisations have duplications and other redundancies in their measurements and reports, leading to major inefficiencies and ineffectiveness.
- The way specific M&Rs link to the business model and whether they are value creating or not is often unclear.
- The link between M&Rs and their competency type (core differentiating, core competitive, non-core) is not made.

What many organizations do not realize is that there is something common within all the mentioned areas where M&R aspects need to be applied. The common things are the M&R objects. We have through research and analysis identified the semantic relations of the various M&R objects and how they can be applied within different disciplines. The relations of the M&R objects are build into our M&R templates e.g. M&R maps, M&R matrices and or M&R models.

### Usage of Measurement & Reporting Maps

A M&R map is an accurate list and representation of the decomposed and/or composed M&R objects. Therefore the M&R map provides an overview of the key M&Rs of the organisation and their drivers & forces, strategy, M&R driver, goal, objective, performance, and their M&R proposition. The M&R maps are often portrayed in the form of a list, which can range from a simple row to a catalogue of M&R objects. It has the purpose of building an inventory or index list of the M&R objects that are to be decomposed and/or composed and thereby applied in the different Layers (business, application and technology).



## The Measurement & Reporting Reference Content Architecture & Modelling Rules

The M&R map should capture the key measurements and reports of the organisation and their objective (critical success factor, plan, forecast, budget), tier (strategic/tactical/operational), performance indicator, service measurement/service performance indicator, process measurement/process performance indicator, report, and system report.

### The M&R Map

M&R #	What/which specification:		Where specification:		Who/whom specification:	
	Objective (CSF, plan, forecast, budget)	Performance Indicator (Strategic/Tactical/Operational)	Service Measurements (Service Level Agreements)	Process Measurements (PPI)	Reporting	System Reports

Figure 6: M&R map with decomposed M&R objects.

The M&R map's capturing should be based on enterprise modelling- and architecture rules and is related to LEAD tasks. Therefore for each individual column of the M&R map their applicable decomposition- (D), primary- (P) and secondary (S) relationship related rules (Rule) as well as the related tasks (Task) are described below:

The 'what/which' specification in terms of objective (critical success factors, plan, forecast, budget).	
Rules	(S) Measurement relates to Objective.
Tasks	<ul style="list-style-type: none"> <li>Identify, categorize and label the objectives;               <ol style="list-style-type: none"> <li>Critical Success Factors, 2. Planning, 3. Forecasting and 4. Budgeting</li> </ol> </li> </ul>
The 'what/which' specification in terms of which performance indicator (strategic, tactical, operational).	
Rules	(S) Measurement relates to Performance (Performance Indicator Tier).
Tasks	<ul style="list-style-type: none"> <li>Identify, categorize and label the Performance Indicators (KPI's);               <ol style="list-style-type: none"> <li>Strategic Key Performance Indicators</li> <li>Tactical Key Performance Indicators</li> <li>Operational Key Performance Indicators</li> </ol> </li> </ul>
The 'where' specification in terms of which service measurements (service performance measurements, or service level agreements).	

Rules	(S) M&R relates to Performance (Service Performance Indicator).
Tasks	• Connect the service measurements (SLA's) to measurement and reporting.
The 'where' specification in terms of which process performance indicator (PPI).	
Rules	(S) M&R relates to Performance (Process Performance Indicator).
Tasks	• Connect the process measurements (PPI's) to measurement and reporting.
The 'who/whom' specification in terms of which owner.	
Rules	(D) M&R relates to Reports.
Tasks	• Identify which; 1. Business owner, 2. Service owner, 3. Process owner, 4. Application/system owner, 5. Data owner, 6. Platform, 7. Infrastructure owner has measurement and reporting functions
The 'who/whom' specification in terms of which system report.	
Rules	(S) M&R relates to Application (Application/System Reports).
Tasks	• Connect the application/system reports to measurement and reporting.

Figure 7: How M&R is based on rules and relates to LEAD tasks.

# Way of Working around Measurement & Reporting aspects

## Description

The M&R Way of Working is critical discipline of translating both strategic planning and effective execution. Structure the arrangement of effort and work, by translating the “Way of Thinking” into a structural way of working. The Way of Working organizes, classifies, aligns, arranges, quantifies, recommends and selects the M&R objects and with it the relevant M&R template in a systemized and categorized way they need to be de-composed (broken down) or composed (related) together.

The Way of Working is where one defines the best suitable technique, manner, routine and method that will help the practitioner to ensure integrity, accuracy and completeness of each particular task related to the rule that ensures the right M&R relation. The M&R way of working is therefore a series of phases with a collection of activities that the user of the M&R methods needs to follow and undertake in order to reach a specific goal/outcome. The below specified way of working therefore structures the practitioner’s techniques in applying the right semantic principles, rules, procedures and practices.

## Usage of Measurement & Reporting Matrices

The M&R matrices are a representation that accurately shows the relationship between specific decomposed and composed M&R objects. The core idea of a the M&R matrices is that they consists of the M&R objects that have primary and thereby direct natural relations, these are always in a list form (row and columns) and the M&R objects that need to be related to them. This is seen in the M&R matrices as the cross product between the rows and columns. This allows within the M&R matrix to relate the unfamiliar to the familiar M&R objects in the different layers (composition), which represents the matrix diagram (rows and columns). These ontology and semantic based M&R relations have been standardized to ensure reusability and replication of success in outlining the right connection points that is actually based on a common relationship pattern of the M&R objects.

## The Measurement & Reporting Reference Content Architecture & Modelling Rules

The M&R matrix should capture should capture for each measurement/report the owner, the requirement, the business area and –group, the service area and –group, and the process area and –group. These are captured in separate matrixes as described below.

## Measurement & Reporting-Owner Matrix

This matrix shows the columns of the M&R map in combination with the owner; who is the owner of the measurement or report.

	M&R #	What/which specification:		Where specification:		Who/whom specification:	
		Objective (CSF, plan, forecast, budget)	Performance Indicator (Strategic/Tactical/Operational)	Service Measurements (Service Level Agreements)	Process Measurements (PPI)	Reporting	System Reports
Measure/Report Owner 1	#						
Measure/Report Owner 2	#						
Measure/Report Owner N	#						

Figure 8: A matrix showing how M&R relates to owner.

The M&R matrix's capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the M&R map. In addition to those rules and tasks, the following rules and tasks are related to owner:

The 'who' specification in terms of who is the owner of the measurement or report.	
Rules	(S) M&R relates to Owner (Measurement Owner, Report Owner).
Tasks	<ul style="list-style-type: none"> <li>• Connect and tie the business owner to the strategic business objective.</li> <li>• Connect and tie the business owner to the performance indicator (strategic, tactical, operational).</li> <li>• Connect and tie the service owner to the service measurement.</li> <li>• Connect and tie the process owner to the process measurement.</li> <li>• Connect and tie the business-, process-, service-, application/system- platform-, infrastructure-, channel-, and other owners to the system reports.</li> </ul>

Figure 9: A table showing that M&R objects relate to owner and the tasks associated with it.

## Measurement & Reporting-Requirement Matrix

This matrix shows the columns of the M&R map in combination with requirement; what are the requirements for measuring and reporting results.

	M&R #	What/which specification:		Where specification:		Who/whom specification:	
		Objective (CSF, plan, forecast, budget)	Performance Indicator (Strategic/Tactical/Operational)	Service Measurements (Service Level Agreements)	Process Measurements (PPI)	Reporting	System Reports
Requirement 1	#						
Requirement 2	#						
Requirement N	#						

Figure 10: A matrix showing how M&R relates to requirement.

The M&R matrix's capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the M&R map. In addition to those rules and tasks, the following rules and tasks are related to requirement:

The 'what' specification in terms of what are the requirements of the measurement or the report.	
Rules	(S) M&R relates to Requirement (Measurement Requirements, Report Requirements).
Tasks	<ul style="list-style-type: none"> <li>• Associate and link reports with each of the different business, application and technology requirements.</li> <li>• Associate and link measurements with each of the different business, application and technology requirements.</li> </ul>

Figure 11: A table showing that M&R objects relate to requirement and the tasks associated with it.

## Measurement & Reporting-Business area and Group Matrix

This matrix shows the columns of the M&R map in combination with the business area and -group; what is the business area and –group to which the measurement or report belongs.

	M&R #	What/which specification:		Where specification:		Who/whom specification:	
		Objective (CSF, plan, forecast, budget)	Performance Indicator (Strategic/Tactical/Operational)	Service Measurements (Service Level Agreements)	Process Measurements (PPI)	Reporting	System Reports
Business Area/Group 1	#						
Business Area/Group 2	#						
Business Area/Group N	#						

Figure 12: A matrix showing how M&R relates to business area/group.

The M&R matrix’s capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the M&R map. In addition to those rules and tasks, the following rules and tasks are related to business area and -group:

The ‘what’ specification in terms of to what business area and –group the measurement or report belongs	
Rules	(S) M&R relates to Business Area and –Group.
Tasks	<ul style="list-style-type: none"> <li>• Connect and link business areas and –group(s) to the strategic business objective.</li> <li>• Connect and link business areas and –group(s) to the performance indicator (strategic, tactical, operational).</li> <li>• Connect and link business areas and –group(s) to the service measurement.</li> <li>• Connect and link business areas and –group(s) to the process measurement.</li> <li>• Connect and link business areas and –group(s) to the process measurement.</li> <li>• Connect and link business areas and –group(s) to the measurement/report owners.</li> <li>• Connect and link business areas and –group(s) to the system reports.</li> </ul>

Figure 13: A table showing that M&R objects relate to business area and the tasks associated with it.

## Measurement & Reporting- Service area and Group Matrix

This matrix shows the columns of the M&R map in combination with the owner; what is the related service area and –group of the measurement or report.

	M&R #	What/which specification:		Where specification:		Who/whom specification:	
		Objective (CSF, plan, forecast, budget)	Performance Indicator (Strategic/Tactical/Operational)	Service Measurements (Service Level Agreements)	Process Measurements (PPI)	Reporting	System Reports
Service Area/Group 1	#						
Service Area/Group 2	#						
Service Area/Group N	#						

Figure 14: A matrix showing how M&R relates to service.

The M&R matrix’s capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the M&R map. In addition to those rules and tasks, the following rules and tasks are related to service area and -group:

The ‘what’ specification in terms of to which service area and –group the measurement or report belongs	
Rules	(S) M&R relates to Service (Service Area and –Group).
Tasks	<p>Connect and link service areas and –group(s) to the strategic business objective.</p> <ul style="list-style-type: none"> <li>• Connect and link service areas and –group(s) to the performance indicator (strategic, tactical, operational).</li> <li>• Connect and link service areas and –group(s) to the service measurement.</li> <li>• Connect and link service areas and –group(s) to the process measurement.</li> <li>• Connect and link service areas and –group(s) to the process measurement.</li> <li>• Connect and link service areas and –group(s) to the measurement/report owners.</li> <li>• Connect and link service areas and –group(s) to the system reports..</li> </ul>

Figure 15: A table showing that M&R objects relate to service and the tasks associated with it.

## Measurement & Reporting-Process Area and Group Matrix

This matrix shows the columns of the M&R map in combination with the process area and -group; what is the related process area and –group of the specific measurement or report.

	M&R #	What/which specification:		Where specification:		Who/whom specification:	
		Objective (CSF, plan, forecast, budget)	Performance Indicator (Strategic/Tactical/Operational)	Service Measurements (Service Level Agreements)	Process Measurements (PPI)	Reporting	System Reports
Process Area/Group 1	#						
Process Area/Group 2	#						
Process Area/Group N	#						

Figure 16: A matrix showing how M&R relates to process.

The M&R matrix’s capturing should be based on enterprise modelling- and architecture rules and is related to the LEAD tasks as described under the M&R map. In addition to those rules and tasks, the following rules and tasks are related to process area and -group:

The ‘what’ specification in terms of to which process area and –group the measurement or report belongs.	
Rules	(S) M&R relates to Process (Process Performance Indicator).
Tasks	<p>Connect and link process areas and –group(s) to the strategic business objective.</p> <ul style="list-style-type: none"> <li>• Connect and link process areas and –group(s) to the performance indicator (strategic, tactical, operational).</li> <li>• Connect and link process areas and –group(s) to the service measurement.</li> <li>• Connect and link process areas and –group(s) to the process measurement.</li> <li>• Connect and link process areas and –group(s) to the process measurement.</li> <li>• Connect and link process areas and –group(s) to the measurement/report owners.</li> <li>• Connect and link process areas and –group(s) to the system reports.</li> </ul>

Figure 17: A table showing that M&R objects relate to process and the tasks associated with it.



## Way of Modelling around Measurement & Reporting aspects

The M&R Way of Modelling provides the means for the various practitioners working with M&R aspects to assist them in defining the modelling principles required to make an objective assessment of the possible M&R object relationships with other objects. It provides a uniform and formal description of the models where the M&R objects and artefacts within one or more different types of models can be portrayed.

The M&R models are a representation that graphically represents and shows the M&R relationship and the interconnection of specific composed objects and complies with a specific set of rules for what the graphical components mean, and how they are connected to the rest of the business. The key ideal of a M&R model is that it is a representation, an illustration, of a composition of information intended to represent an aspect of an enterprise (e.g. business, application and/or technology), using a specific set of rules, which express a logic or grammar.

Each practitioner working with M&R aspects has to be able to translate the “Way of Working” into a “Way of Modelling”, which for the most part include the following:

- **Expressiveness:** the degree to which a given modelling technique is able to denote the models of any number and kinds of layered domains (business, application and technology).
- **Arbitrariness:** the degree of freedom one has when decomposing and composing different models on the same domain.
- **Suitability:** the degree to which a given modelling technique is specifically tailored for a specific kind of wanted output/result.
- **Comprehensibility:** the ease of how the way of working and way of modelling techniques are understood by participants.
- **Coherence:** the degree to which the individual sub-models of a way of modelling constitute a whole.
- **Completeness:** the degree to which all-necessary concepts of the application domains are represented in the way of modelling.
- **Efficiency:** the degree to which the modelling steps (e.g. LEADIng Practice steps) use resources such as time and people.
- **Effectiveness:** the degree to which the modelling principles achieve its goals.
- **Audit:** the degree to which the end results of the models achieve its goals.

Based on already acquired information from the M&R maps and/or a M&R matrices (or both), a M&R model is usually crafted to enable complex information to be used in different disciplines and within this to be communicated more easily to stakeholders, management and leadership. The fully integrated and standardized M&R templates enable the practitioner to work and model with the M&R objects throughout all the aspects of the enterprise (business, application and technology). Not only the objects are governed by its semantic relations and connection; also the specified M&R modelling rules and tasks, which ensure how and where the M&R templates interlink and share common M&R objects, are defined and standardized.

As we explore earlier is the M&R matrix is the continuity of and interconnection between a M&R map (a representation of decomposed and/or composed objects) and a M&R model (a

representation of interconnected and related objects). The M&R maps, matrices and models are therefore used in the decomposition and composition work (within and throughout the layers).

By using the M&R templates to manage the different kinds of highly connected information and relations, the M&R creation is ensured. The M&R map (which list the various related objects in order to capture the decomposed unrelated objects) is vital as well as the M&R matrix (which composes in terms of relating specific objects together) and the M&R model (which graphically represent the decomposed and composed objects) are both critical in integrating and standardizing the M&R templates and tools of the practitioner. Furthermore, it is an essential part of supporting as well as integrating and standardizing the practitioner's Way of Thinking, Working and Modelling.

Last but not least, it ensures integration of the Enterprise Modelling and Enterprise Architecture objects and artefacts. Bringing an organization that uses the M&R way of modelling templates to the highest maturity possible of working not only documented (level 3) or managed (level 4) but enabling optimization, governance and continuous improvement (level 5).

## **Measurement Decomposition & Composition Model**

The Measurement Decomposition & Composition Model is already shown in Figure 2. As described there it shows the sixteen main areas that provide a starting point that can be used the analysis, decomposition, composition and construction of a measurement architecture description.

## **M&R Model**

The M&R Model illustrates the relationship between M&R and:

1. Strategy
2. Goal
3. Objective
4. Value Indicator
5. Timing
6. Reporting
7. Business Area, - Group and -Owner
8. Service Area, -Group and -Owner
9. Process Area, -Group and Owner
10. Application/System owner
11. Data Owner
12. Platform Owner
13. Infrastructure Owner

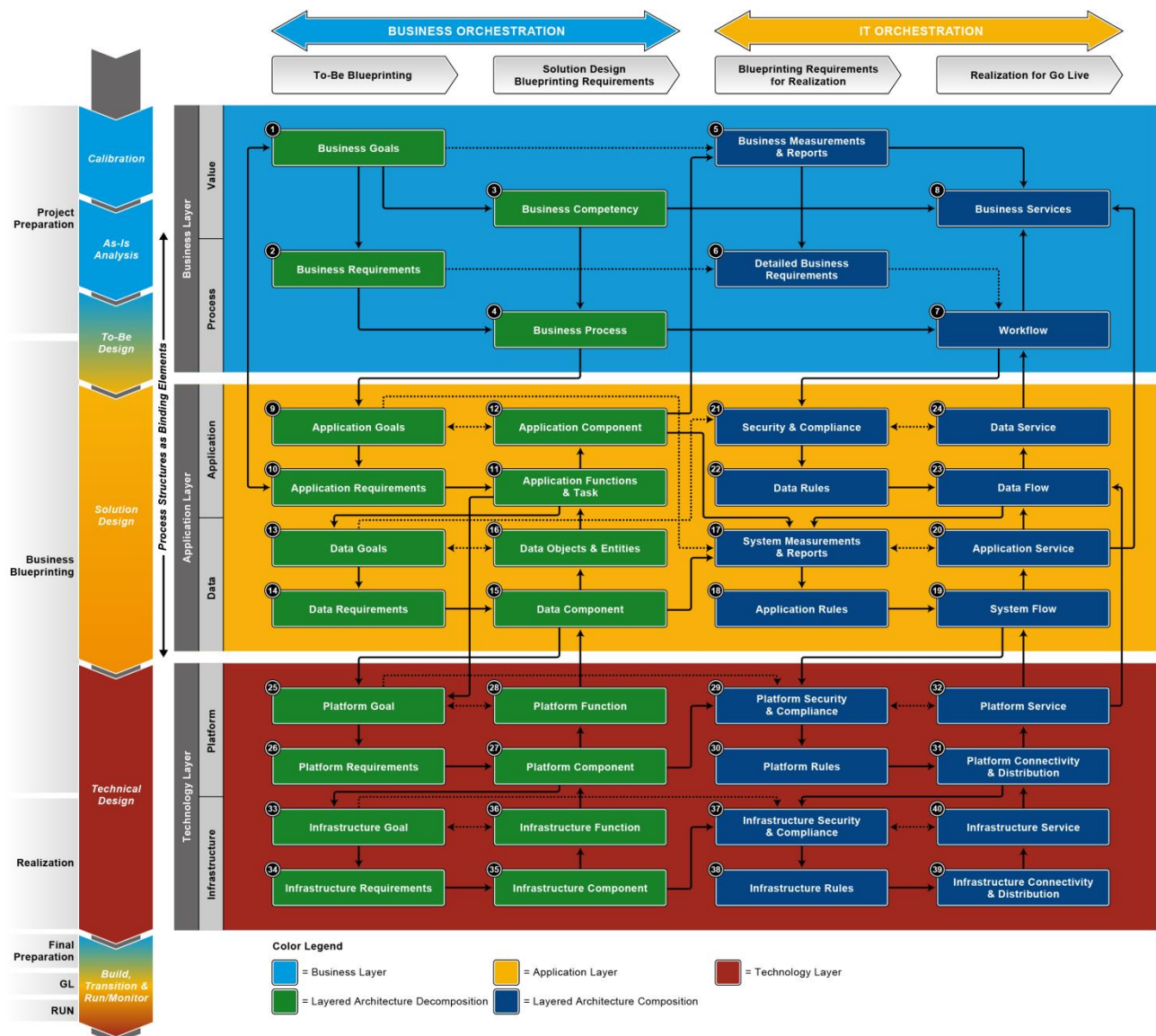
The M&R Model is developed applying the corresponding architectural modelling rules. These have been described above in chapter 'Way of Working around M&R aspects'. The corresponding tasks are included in chapter 'Way of Implementing around Measurement & Reporting aspects' below.

## Way of Implementing around Measurement & Reporting aspects

The Measurement & Reporting Reference Content's Way of Implementation combines the enterprise engineering, enterprise modelling and enterprise architecture principles in an order to apply the way of M&R thinking, M&R working and M&R modelling into the physical and thereby the M&R execution.

Most implementations fall short of transforming the business and creating real M&R due to the fact that they automate the existing Way of Working around M&R concepts. Thereby actually reinforcing a siloed and ineffective way of automation. It is about the possibility to totally rethink the M&R flow within the information flow, the service flow, the process flow as well as the measurement and reporting flow. It can fundamentally rethink and transform the different ways of working within an organization.

The Way of Implementation for measurement & reporting has been developed as a fully integrated part of a Blueprinting and Implementation concept. In this way, the M&R aspects can be integrated to any other engineering, modelling or architecture discipline e.g. process, service, application/software, data etc. With this the Way of Implementation provides a uniform and formal implementation concept of where the M&R meta-objects and artefacts can be used. By using decomposition and composition modelling techniques within the 40 steps of the Way of Implementation, the M&R objects within the templates can be applied to the relevant subjects within the different layers (business, application or technology).



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Figure 20: A model showing the 40 Blueprinting & Implementation steps across the Business, Application and Technology Layer.

Example of the Business Layer where the M&R Objects are used or applied within the implementation steps:

**Step 5: M&R Objects and the tasks to apply them within the Measurement & reporting step:**

- ✓ Map: Identify, categorize and label the **objectives**; 1. Critical Success Factors, 2. Planning, 3. Forecasting, 4. Budgeting (Figure 7).
- ✓ Map: Identify, categorize and label the **Performance Indicators** (KPI's): 1. Strategic Key Performance Indicators, 2. Tactical Key Performance Indicators, 3. Operational Key Performance Indicators to measurement and reporting (Figure 7).
- ✓ Map: Connect the **service measurements** (Service Level Agreements and Service Performance Indicators) to measurement and reporting (Figure 7).

- ✓ Map: Connect the **process measurements** (PPI's) to measurement and reporting; this task is also mentioned under Step 3. Process tasks (Figure 7).
- ✓ Matrix: Associate and link measurement and reporting to each of the different **owners**: 1. Business owners, 2. Service owners, 3. Process owners, 4. Application/system owners, 5. Data owners, 6. Platforms, 7. Infrastructure owners (Figure 7).
- ✓ Map: Connect the **application/system reports** to measurement and reporting (Figure 7).
- ✓ Matrix: Connect and tie the business **owner** to the strategic business objective (Figure 9).
- ✓ Matrix: Connect and tie the business **owner** to the performance indicator (strategic, tactical, operational) (Figure 9).
- ✓ Matrix: Connect and tie the service **owner** to the service measurement (Figure 9).
- ✓ Matrix: Connect and tie the process **owner** to the process measurement (Figure 9).
- ✓ Matrix: Connect and tie the business-, process-, service-, application/system- platform-, infrastructure-, channel-, and other **owners** to the system reports (Figure 9).
- ✓ Matrix: Associate and link measurements with each of the different high-level requirements; business, application and technology **requirements** (Figure 11).
- ✓ Matrix: Associate and link **reports** with each of the different high-level **requirements**; business, -application and technology **requirements** (Figure 11).
- ✓ Matrix: Connect and tie the **business area/group(s)** to the strategic business objective (Figure 13).
- ✓ Matrix: Connect and tie the **business area/group(s)** to the performance indicator (strategic, tactical, operational) (Figure 13).
- ✓ Matrix: Connect and tie the **business area/groups(s)** to the service measurement (Figure 13).
- ✓ Matrix: Connect and tie the **business area/groups(s)** to the process measurement (Figure 13).
- ✓ Matrix: Connect and tie the **business area/groups(s)** to the measurement/report owners (Figure 13).
- ✓ Matrix: Connect and tie the **business area/group(s)** to the system reports (Figure 13).
- ✓ Matrix: Connect and tie the **service area/group(s)** to the strategic business objective (Figure 15).
- ✓ Matrix: Connect and tie the **service area/group(s)** to the performance indicator (strategic, tactical, operational) (Figure 15).
- ✓ Matrix: Connect and tie the **service area/groups(s)** to the service measurement (Figure 15).
- ✓ Matrix: Connect and tie the **service area/groups(s)** to the process measurement (Figure 15).
- ✓ Matrix: Connect and tie the **service area/groups(s)** to the measurement/report owners (Figure 15).
- ✓ Matrix: Connect and tie the **service area/group(s)** to the system reports (Figure 15).
- ✓ Matrix: Connect and tie the **process area/group(s)** to the strategic business objective (Figure 17).
- ✓ Matrix: Connect and tie the **process area/group(s)** to the performance indicator (strategic, tactical, operational) (Figure 17).
- ✓ Matrix: Connect and tie the **process area/groups(s)** to the service measurement (Figure 17).
- ✓ Matrix: Connect and tie the **process area/groups(s)** to the process measurement (Figure 17).
- ✓ Matrix: Connect and tie the **process area/groups(s)** to the measurement/report owners (Figure 17).

- ✓ Matrix: Connect and tie the **process area/group(s)** to the system reports (Figure 17).
- ✓ Matrix: Associate and attach the **Performance Indicators** (KPI's): 1. Strategic Key Performance Indicators, 2. Tactical Key Performance Indicators, 3. Operational Key Performance Indicators, to measurement and reporting.
- ✓ Matrix: Connect the **application/system reports** to measurement and reporting.
- ✓ Model: Develop a Measurement & Reporting Model to depict the relationship between Measurement & Reporting and the **objectives**: 1. Critical Success Factors, 2. Planning, 3. Forecasting, 4. Budgeting.
- ✓ Model: Develop a Measurement & Reporting Model to depict the relationship between Measurement & Reporting and the **Performance indicators** (KPI's): 1. Strategic Key Performance Indicators, 2. Tactical Key Performance Indicators, 3. Operational Key Performance Indicators.
- ✓ Model: Develop a Measurement & Reporting Model to depict the relationship between Measurement & Reporting and the **owners**: 1. Business owners, 2. Service owners, 3. Process owners, 4. Application/system owners, 5. Data owners, 6. Platforms, 7. Infrastructure owners (Figure 7).
- ✓ Model: Develop a Measurement & Reporting Model to depict the relationship between Measurement & Reporting and the **business areas and groups**.
- ✓ Model: Develop a Measurement & Reporting Model to depict the relationship between Measurement & Reporting and the **service areas and groups**.
- ✓ Model: Develop a Measurement & Reporting Model to depict the relationship between Measurement & Reporting and the **process areas and groups**.
- ✓ Model: Develop a Measurement & Reporting Model to depict the relationship between Measurement & Reporting and **application/system reports**.

## Roles involved

The following roles are involved in the definition and maintenance of the M&R templates:

ENTERPRISE MODELLERS	ENTERPRISE ENGINEERS	ENTERPRISE ARCHITECTS
Business Analyst (P)	Value Engineer (P)	Business Architect (P)
Process eXpert (P)	Technology Engineer (P)	Solution Architect (P)
M&R eXpert (P)	Process Engineer (P)	Value Architect (P)
Information eXpert (S)	Quality Engineer (P)	Data Architect (P)
Service eXpert (P)	Change Engineer (P)	Service Architect (P)
Transformation eXpert (S)	Software Engineer (P)	Technology Architect (P)
		Process Architect (P)
		Enterprise Architect (S)
		Information Architect (S)

(P) = Primary object/Role  
(S) = Secondary object/Role

## Conclusion

While this document should be seen and used as a detailed description of how the measurement & reporting reference content can be used, it does not have all aspects of the measurement & reporting reference content and thereby its enterprise engineering, modelling and architecture content. It attempted to build a basis of a structured way of thinking, working, modelling and implementation of M&R objects. It endeavoured to provide a standardized terminology, build common understanding and make available the standardized and integrated M&R templates. Enabling practitioners to use the M&R reference content to:

- Identify the relevant M&R objects.
- Decompose the M&R objects into the smallest parts that can, should and needs to be modelled, and then compose the M&R objects entities before building them (through mapping, simulation and scenarios).
- Visualize and clarify M&R object relationships with the M&R artefacts by using maps, matrices and models (alternative representation of information).
- Reduce and/or enhance complexity of M&R modelling, M&R engineering and M&R architecture principles applying the M&R decomposition and composition standard (see Decomposition and Composition Reference Content)
- Model the relevant M&R objects through the architectural layers (see Layered Architecture Reference Content).
- Adding M&R Requirements (see Requirement Reference Content)
- Provide a structured M&R Blueprinting and Implementation (see Blueprint & Implementation Reference Content).

For further learning around semantic object relations, decomposition and composition, layered modelling, engineering and architecture or how the M&R reference content can be used within the other LEADIng Practice Reference Contents we refer both to the LEADIng Practice Body of Knowledge document as well as the other LEADIng Practice Enterprise Standards and their Reference Content on [www.LEADIngPractice.com](http://www.LEADIngPractice.com).

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