

Welcome!

We'll start shortly...

Meantime, please take **polls 1-3**.
Go to www.menti.com and use the code

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<https://www.menti.com/j2qosex859>



Mobile QR Code



T B M C O U N C I L

TBM Taxonomy v4.0 Draft

Standards Committee Webinar

November 19, 2020

Introductions



- ▶ Ed Hayman#
TBM Architect & Senior Director, Products
Apptio
EHayman@Apptio.com



- ▶ Jasmine Ellsworth
Workgroup Program Manager
TBM Council
JEllsworth@TBMCouncil.org



- ▶ Todd Tucker
VP, Standards and Education
TBM Council
TTucker@TBMCouncil.org

Technical Advisor to the TBM Council Standards Committee

“Modified” Chatham House Rule

Applies to Kick-Off and All Workgroup Meetings

Chatham House Rule

The unmodified Chatham House Rule reads as follows:

When a meeting, or part thereof, is held under the Chatham House Rule, participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed.

Our Modifications

- We will take minutes of the meeting that may identify individuals or their companies. Distribution is limited to board members and management.
- If the TBM Council or our guests wish to publish anything that identifies others, they must get explicit permission from those individuals.

TBMC Antitrust Guidelines

Applies to Kick-Off and All Workgroup Meetings

Guidelines

We've applied the following protocols to minimize the antitrust risks associated with the meeting or function:

- Meetings and functions will follow a prepared agenda; any deviations will be noted in the meeting minutes.
- The TBM Council will prepare meeting minutes summarizing all topics of discussion. The meeting minutes will reflect the names of all attendees, as well as the results of any votes taken.

Please also be sensitive and mindful of antitrust concerns outside of the formal meeting setting, such as during social gatherings, receptions or meals.

Prohibited Items of Discussion

- Specific prices or terms or conditions of sale where the seller is identified by name
- Specifically received discounts, rebates, service charges, or other terms and conditions of purchases and sales, where the seller is identified by name
- Whether to do business with certain suppliers, or divide up sales among certain suppliers
- Whether to do business with any customers, or divide up sales among certain customers
- Whether to do business with any competitors
- The nature and composition of RFPs in the IT industry
- Complaints regarding the practices of individual firms
- Confidential info regarding future plans or offerings

Today's Focus Areas

- ▶ Walk through the final draft of TBM Taxonomy version 4.0
- ▶ Discuss changes made and why
- ▶ Open up for questions
- ▶ Share next steps
- ▶ Discuss potential Standards Committee focus areas for 2021

TBM COUNCIL

TBM Taxonomy

Version 4.0 DRAFT
November 18, 2020

This paper provides a detailed description of the Technology Business Management (TBM) taxonomy. It is designed to be shared with the TBM Council Standards Committee for the purpose of gathering feedback and communicating changes and updates. The document is also made available via the TBM Council's community web site, TBM Connect (www.tbmconnect.org), for all members to read and use the information. For more information on the Standards Committee, see last page of this document or refer to the TBM Council Standards Committee Charter, also available on TBM Connect.

Date	Reason for Changes	Version
10/21/2016	Final revision for TBM Council endorsement	V2.0
03/28/2018	Final revision for TBM Council endorsement	V2.1
11/02/2018	Added missing "High Performance Computing"	V3.0
04/19/2019	Added missing "Foundation Platform", "Order Management" and "Facility & Equipment Maintenance & Repair" definitions.	V3.0.1
07/18/2019	Equipment Maintenance & Repair definitions.	V3.0.2
11/18/2020	Various changes made through 2020 open forums and other feedback mechanisms.	V4.0 DRAFT

Note: A complete document history is maintained in the Standards Committee on TBM Connect.

Customers & Partners
Product Lines
Digital Platforms
Shared & Corporate
Infrastructure
IT Management
Output
Internal Services

Business View
IT View
Finance View

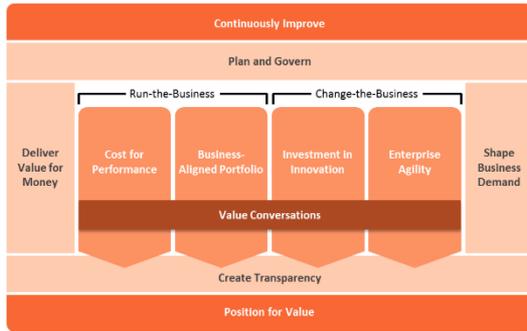
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TBM TAXONOMY

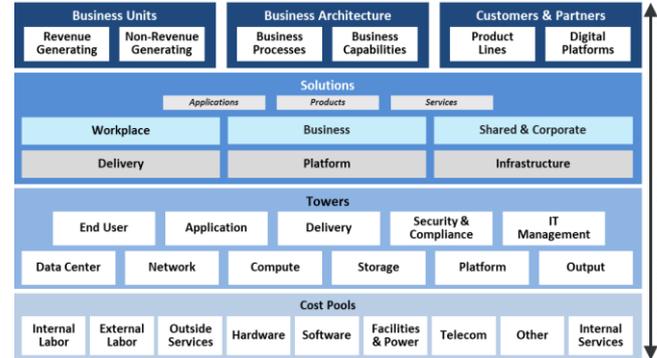
TBM Taxonomy v4.0 DRAFT

Brief Intro of TBM Taxonomy

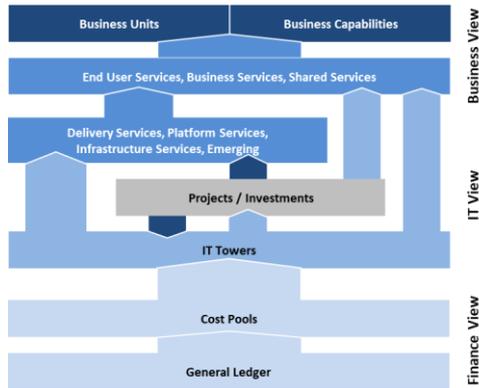
The Four Tools of TBM



TBM Framework



TBM Taxonomy



TBM Model

KPI	Description
Unit Cost Actuals vs. Targets for IT Towers	Per unit cost targets for towers should be set annually during planning based on budgets, expected units consumed (from capacity planning), and industry benchmarks (where available). Actual cost per unit should be compared monthly or quarterly. These should represent a majority of your tower spending.
Unit Cost Actuals vs. Targets for Business-Facing IT Services or Apps	Per unit cost targets for services or apps (inclusive of towers that support them) should be set annually during planning based on budgets, expected units consumed (from capacity planning), and industry benchmarks (where available). Actual costs per unit should be compared monthly or quarterly.
Business-Facing IT Services or Apps Meeting SLAs	Based on total cost of the portfolio, this percentage reveals how much of your applications or services that are delivered to business unit customers are meeting service-level agreements.
Customer Satisfaction Scores for Business-Facing Services	This measure reflects the outcome of surveys of the users of business-facing services. This may include Net Promoter Score or other mechanisms, but should not be limited to the service or help desk. Instead, all major services should be included in the survey.

TBM KPIs/Metrics

Industry Is Behind the Taxonomy





Standards Committee Charter

VERSION 2.1

April 2017



www.TBMCouncil.org

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Up to 15 Voting Members Plus CIO Chair

Open Input from Industry

Formal Specifications Document

TBM Taxonomy: Version 3.0 (November 2018)
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Category	Name	Description
Security & Compliance	Security & Compliance	Security and proper use of information technology resources, including identification & access control, incident response, threat intelligence, risk management, and compliance.
	Identity & Access Management	Identity and access management (IAM) taxonomy, it includes the purpose of gathering and managing user identities available via the TBM Taxonomy.
	Security Awareness	Security awareness training and education to help employees understand the risks of security incidents and how to prevent them.
Cyber Security & Incident Response	Cyber Security & Incident Response	Procedures and processes for detecting, responding to, and recovering from cyber security incidents.
	Threat & Vulnerability Management	Processes and tools for identifying, assessing, and mitigating vulnerabilities in IT systems.
Data Privacy & Security	Data Privacy & Security	Processes and tools for ensuring the privacy and security of data throughout its lifecycle.

TBM Taxonomy: Version 3.0 (November 2018)
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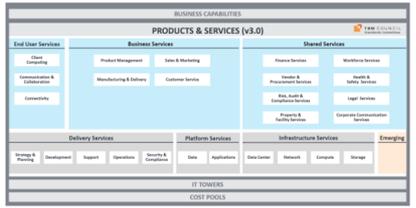


Figure 5: TBM Taxonomy Business Layer (Products & Services View)

The service hierarchy is grouped by service type (e.g., end user services, platform services), service category (e.g., client computing, communication & collaboration) and service name. Service offerings, as shown below, would be specific to the organization and are included in the TBM taxonomy as representative examples.

<p>Services Hierarchy</p> <ol style="list-style-type: none"> 1. Service Type 2. Service Category 3. Service Name 4. Service Offering 	<p style="font-size: 2em;">}</p>	<p>Standardized TBM Taxonomy</p> <hr style="border-top: 1px dashed black;"/> <p>Customer specific modifications</p>	<p>Example</p> <ul style="list-style-type: none"> ➢ End User ➢ Client Computing ➢ Computer ➢ Standard Desktop ➢ Dev-Workstation
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Figure 6: TBM Taxonomy Services Hierarchy

The six Service Types defined in the standard TBM taxonomy include:

- **End User Services** include the client computing devices, software and connectivity to enable the workforce to access business applications; to communicate with other employees, partners and customers; and to create content using productivity software. These are always "user-facing" services.
- **Business Services** are delivered by IT to enable product and external customer focused business capabilities that enable the business to win, serve, and retain customers. The TBM Taxonomy includes a generic set of capabilities that most enterprises perform including Product Management, Sales & Marketing, Manufacturing & Delivery and Customer Service. Additional technology

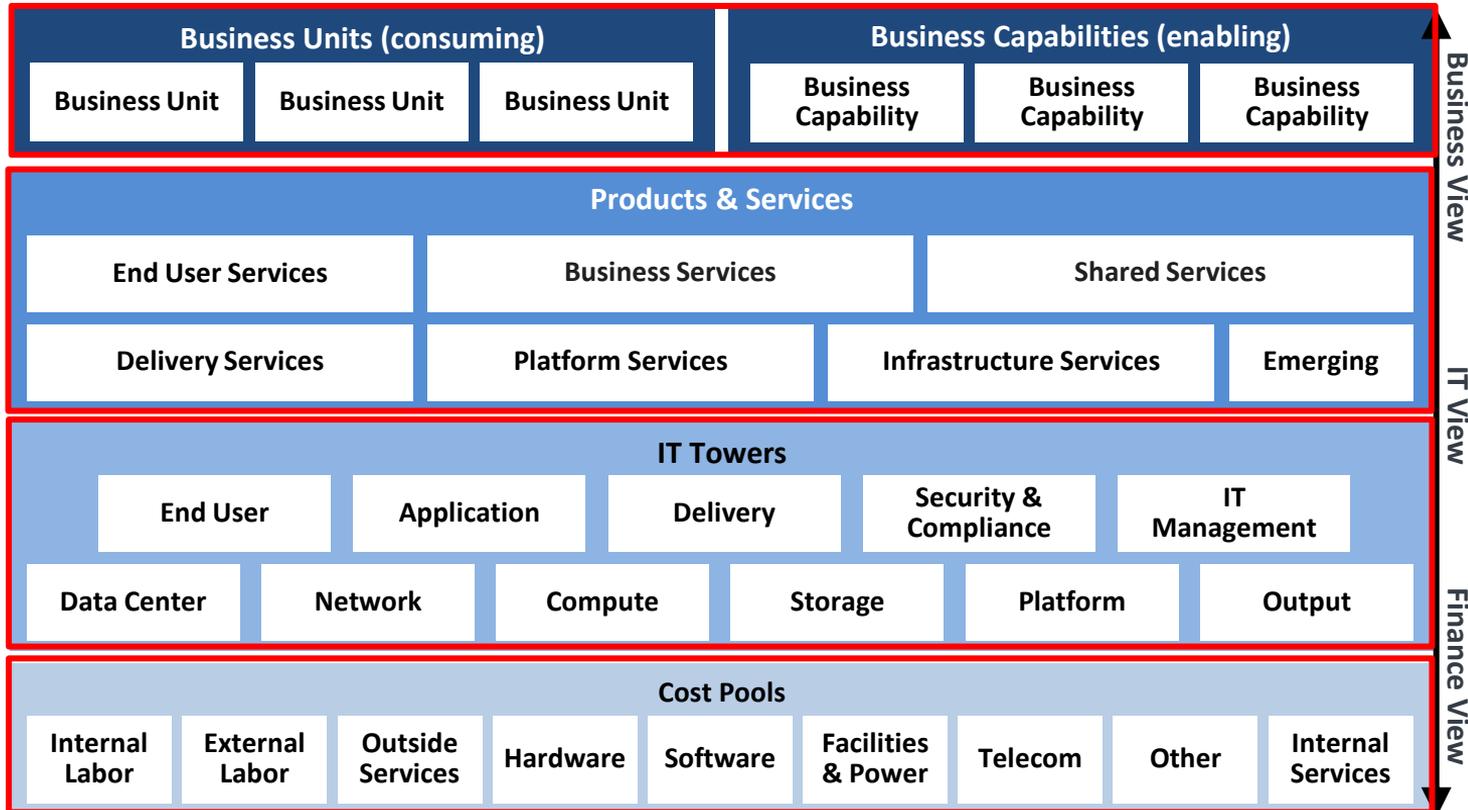
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Download full taxonomy specification at:
<https://tbmcouncil.jiveon.com/community/tbm-council-home/resources/tbm-framework-taxonomy>

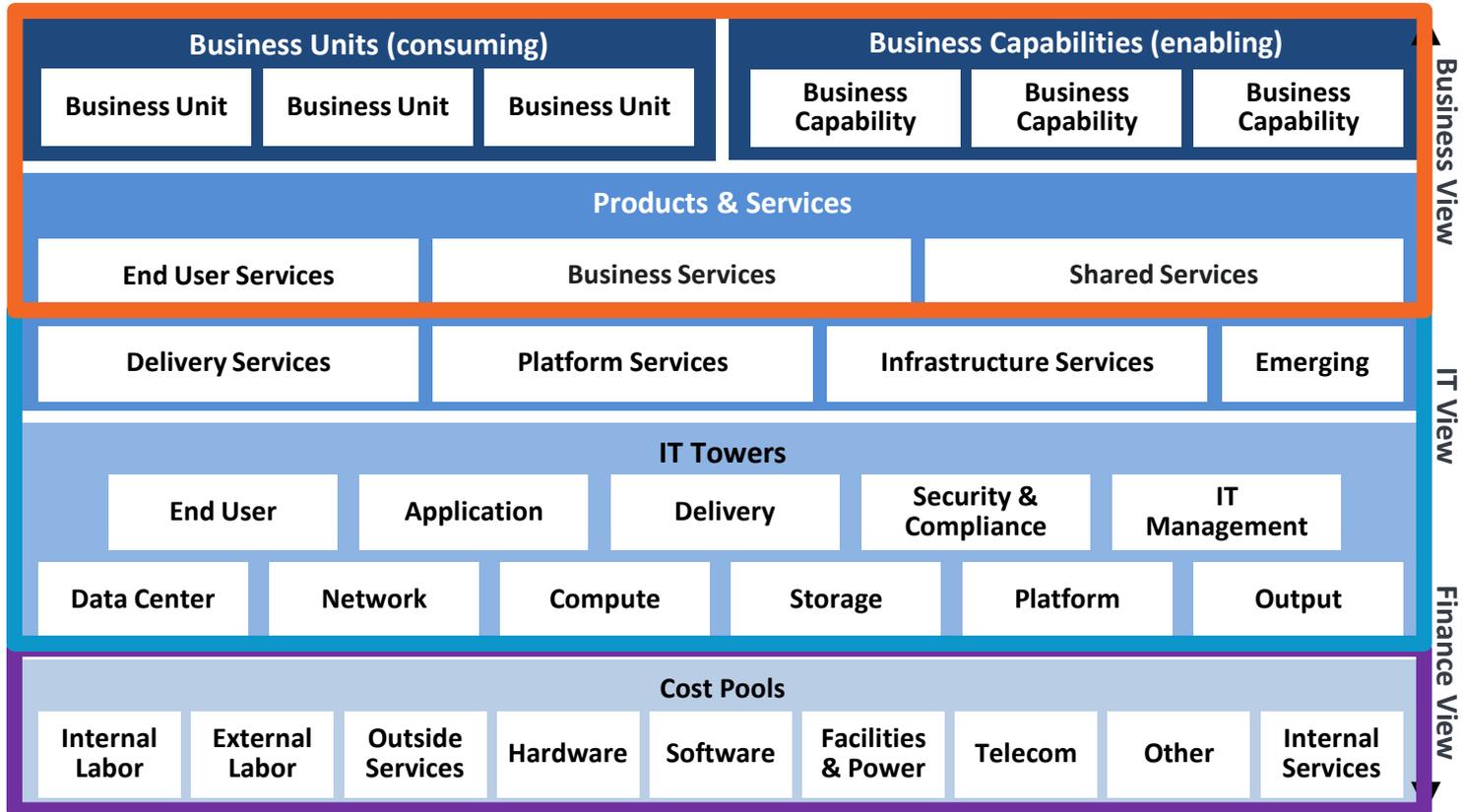
NOTE: Requires TBM Council General Membership and valid TBM Connect credentials

The TBM Taxonomy: 4 Layers

Which do you use: Poll 4
www.menti.com 56 95 96 7

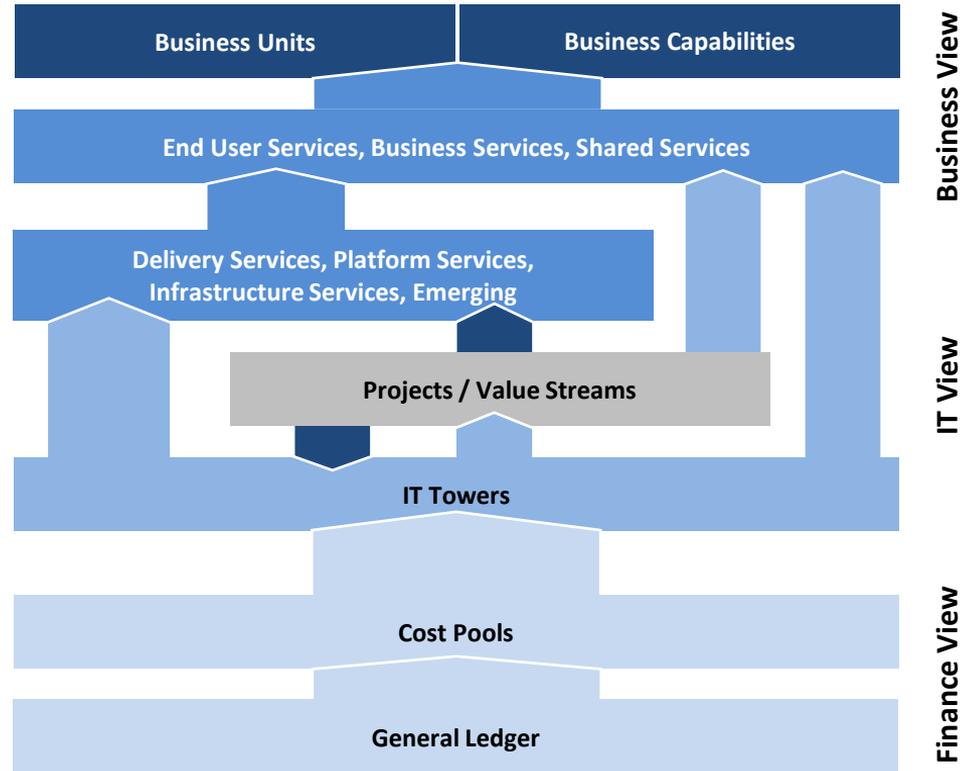


The TBM Taxonomy: 3 Views



TBM Model: The Translation Engine

- ▶ The TBM *taxonomy*:
 - defines the three perspectives (languages) of finance, IT and business
 - does NOT translate between the three perspectives
- ▶ The TBM *model*:
 - translates between the three perspectives
 - allocates (apportions) costs from lower layers to the upper layers
 - Is usually a software tool



“ATUM” vs. TBM Taxonomy

- ▶ Many people use these terms interchangeably
- ▶ **ATUM**® = **A**pptio **T**BM **U**nified **M**odel®
- ▶ ATUM incorporates the TBM taxonomy
- ▶ TBM taxonomy is defined and maintained by the TBM Council (Apptio as technical advisor)
- ▶ TBM taxonomy is used by many third parties and is openly available to the IT community

The Standard Model for IT Costs | The Apptio TBM Unified Model (ATUM) | APPTIO

1. Data: What to gather
 Gather data to feed the model. Source data elements, formats, and relationships needed by the Model.

2. Taxonomy: How to organize
 Map costs to standard taxonomy. Standard management categories for common IT functions. TBM Council Endorsed.

3. Model: How to calculate
 The shared business rules. Standard costing rules to map and apportion general ledger (GL) costs to IT categories.

Data
 Source data elements, formats, and relationships needed by the Model

Taxonomy
 Standard management categories for common IT functions
 TBM Council Endorsed

Model
 Standard costing rules to map and apportion general ledger (GL) costs to IT categories

APPTIO TBM Unified Model (ATUM)

ATUM® includes Apptio’s proprietary product content for data definitions, data mapping, allocation rules, and other components. ATUM® poster can be downloaded at: <https://www.apptio.com/ATUM>

Weekly Cadence from June – October 2020

▶ **Week 1: Internal Planning**

- Plan topics and focus areas for the month

▶ **Week 2: Monthly Standards Webinar**

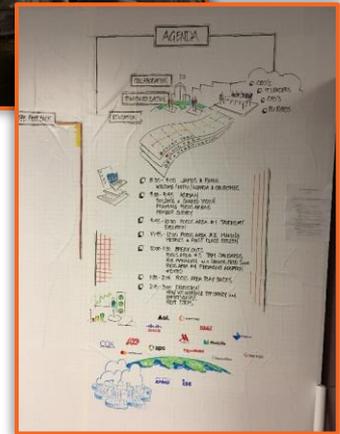
- Focus on taxonomy, metrics and related standards work
- Evangelize and educate the TBM community

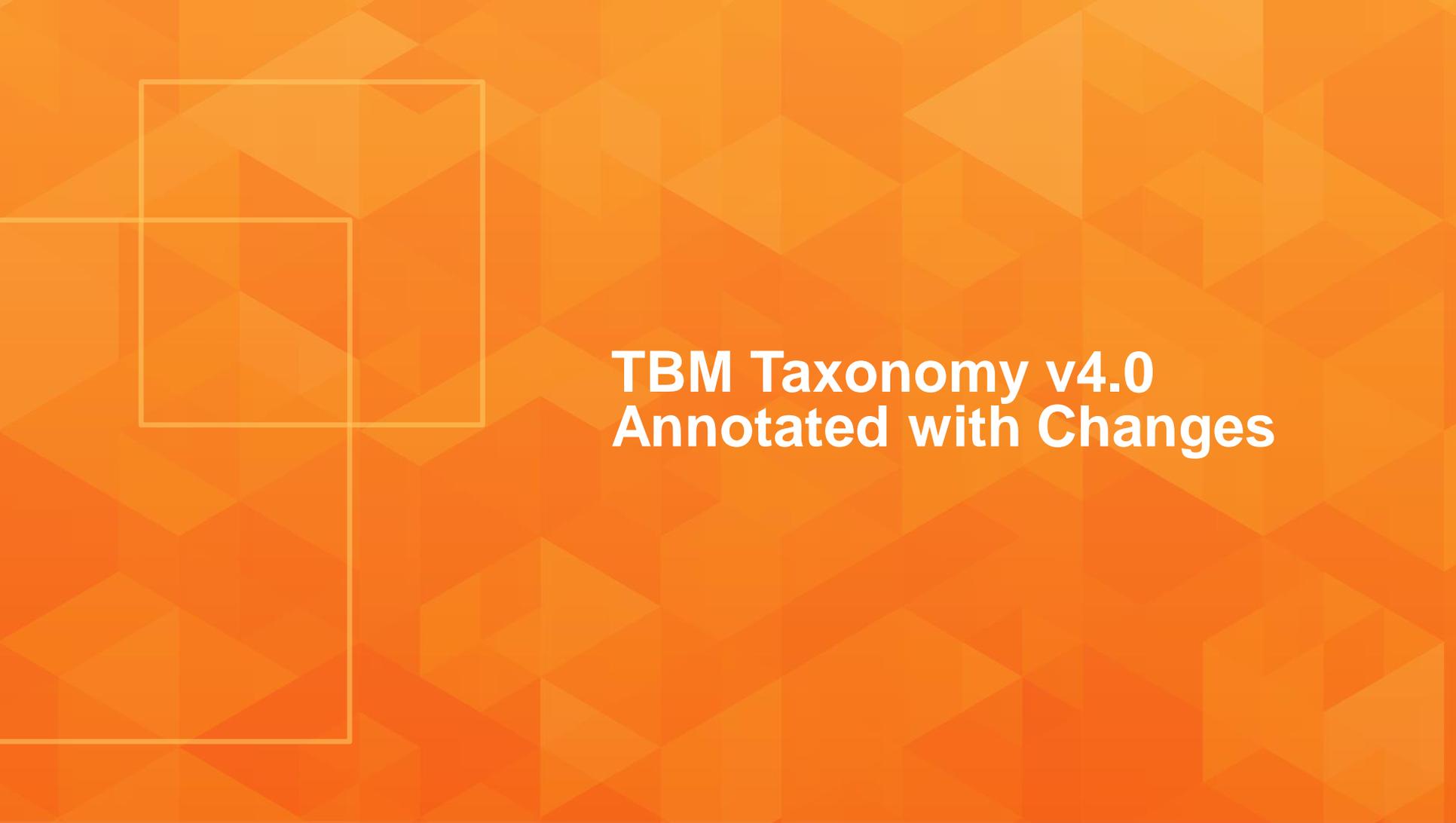
▶ **Week 3: Open Standards Forum**

- Teleconference for questions and feedback
- Workgroup chairs encouraged to attend and share recommendations

▶ **Week 4: Monthly Standards Committee Meeting**

- Address regular committee business
- Review community feedback and make necessary changes





TBM Taxonomy v4.0 Annotated with Changes

TBM Taxonomy V4.0 (Final Draft)

Summary of Changes

Cost Pools Layer

- ▶ No change

IT Towers Layer

- ▶ Rename layer to **Towers** (drop “IT”)
- ▶ **Platform** tower: add **Container Orchestration** and **Big Data** sub-towers

Business Layer

- ▶ **Business Units:** breakout Revenue and Non-Revenue Generating sub-categories
- ▶ **Business Capabilities:** changed to **Business Architecture** with Business Process and Business Capabilities sub-categories
- ▶ Added **Customers & Partners** with Product Line and Digital Platform sub-categories

Products & Services Layer

- ▶ Rename layer to “**Solutions**” and add elements for Applications, Products and Services.
- ▶ **Service Category naming:** Remove “Services” from category names; compatible with Agile/Product views
- ▶ **Platform > Application**
 - Add new **Development Platform** service
- ▶ **Delivery > Development**
 - Add new **Modernization & Migration** service
- ▶ **End User**
 - Rename category to **Workplace**
- ▶ **Offerings (across all services)**
 - Add newer, representative offerings

TBM Taxonomy V4.0 DRAFT

Added Customers & Partners with:

- Product Lines
- Digital Platforms

Changed Business Unit sub-elements to:

- Revenue Generating
- Non-Revenue Generating



Changed Business Capabilities to Business Architecture and added:

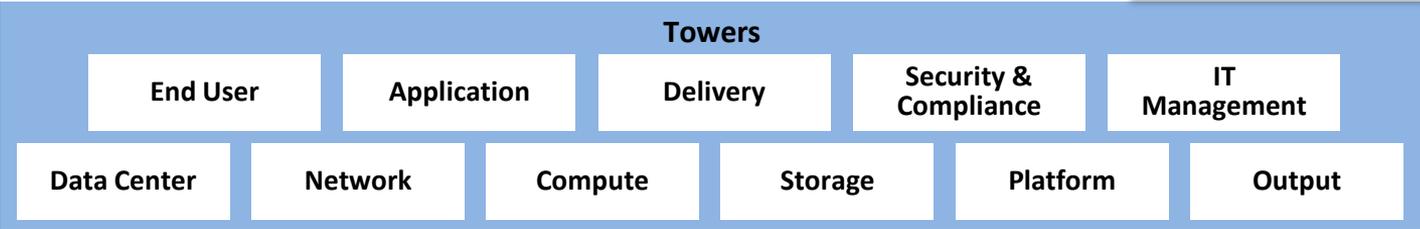
- Business Processes
- Business Capabilities



Changed Products & Services to Solutions

Added Solution Classes:

- Applications
- Products
- Services



No changes

COST POOLS (v4.0)

	INTERNAL LABOR	EXTERNAL LABOR	OUTSIDE SERVICES	HARDWARE	SOFTWARE	FACILITIES & POWER	TELECOM	OTHER	INTERNAL SERVICES
Operating Expenditures	Expense	Expense	Consulting	Expense	Expense	Expense	Expense	Other	by Shared Service*
			Managed Service Provider	Lease	Licensing	Lease	Lease		
			Cloud Service Provider	Maintenance & Support	Maintenance & Support	Maintenance & Support	Maintenance & Support		
				Depreciation & Amortization	Depreciation & Amortization	Depreciation & Amortization	Depreciation & Amortization		
CapEx	Capital	Capital	Capital	Capital	Capital	Capital	Capital		

Added new Platform sub-towers:

- **Container Orchestration**
- **Big Data**

TOWERS (v4.0)

DATA CENTER	COMPUTE	STORAGE	NETWORK	PLATFORM	OUTPUT	END USER	APPLICATION	DELIVERY	SECURITY & COMPLIANCE	IT MANAGEMENT
Enterprise Data Center	Servers <i>(Windows/Linux)</i>	Online Storage	LAN/WAN	Database	Central Print	Workspace	Application Development	IT Service Management	Security	IT Management & Strategic Planning
Other Facilities	Unix	Offline Storage	Voice	Middleware		Mobile Devices	Application Support & Operations	Operations Center	Compliance	Enterprise Architecture
	Midrange	Mainframe Online Storage	Transport	Mainframe Database		End User Software	Business Software	Program, Product & Project Management	Disaster Recovery	IT Finance
	Converged Infrastructure	Mainframe Offline Storage		Mainframe Middleware		Network Printers		Client Management		IT Vendor Management
	Mainframe			Container Orchestration		Conferencing & AV				
	High Performance Computing			Big Data		IT Help Desk				
							Deskside Support			

No changes

SOLUTIONS (v4.0)

Applications Products Services

Workplace

Client Computing	Communication & Collaboration
Connectivity	

Business

Product Management	Sales & Marketing
Manufacturing & Delivery	Customer Service
Or	
<i><u>Industry specific solutions to win, serve and retain customers</u></i>	

Shared & Corporate

Finance	Workforce
Vendor & Procurement	Health & Safety
Risk, Audit & Compliance	Legal
Property & Facility	Corporate Communication

Delivery

Strategy & Planning	Development
Support	Operations
Security & Planning	

Platform

Data	Application
------	-------------

Infrastructure

Data Center	Network
Compute	Storage

Added new Development service:

- **Modernization & Migration**

SOLUTIONS (v4.0)

Delivery

Strategy & Planning	Development	Support	Operations	Security & Compliance
<ul style="list-style-type: none"> • Technology Business Management <ul style="list-style-type: none"> • <i>IT Planning</i> • <i>IT Finance & Costing</i> • <i>IT Billing</i> • <i>Business Value</i> • <i>Metrics & Benchmarking</i> • <i>Strategy Management (new)</i> • <i>Service Portfolio management</i> • <i>Service Catalog management</i> • <i>Service Level management</i> • <i>Availability management</i> • Innovation & Ideation <ul style="list-style-type: none"> • <i>New technology solutions</i> • <i>Incubation services</i> • Enterprise Architecture <ul style="list-style-type: none"> • <i>Business architecture</i> • <i>Information architecture</i> • <i>Application architecture</i> • <i>Infrastructure architecture</i> • Program, Product & Project Management <ul style="list-style-type: none"> • <i>Portfolio investment planning</i> • <i>Project planning & delivery</i> • <i>Continuous planning & delivery</i> • Business Solution Consulting <ul style="list-style-type: none"> • <i>Business Relationship management</i> • <i>Business Process analysis</i> • <i>Technology solution analysis</i> • <i>Demand management</i> • IT Vendor Management <ul style="list-style-type: none"> • <i>Vendor Selection / Negotiation</i> • <i>Procurement</i> 	<ul style="list-style-type: none"> • Design & Development <ul style="list-style-type: none"> • <i>Custom build</i> • <i>Package configuration</i> • <i>SaaS configuration</i> • System Integration <ul style="list-style-type: none"> • <i>On-prem application integration</i> • <i>SaaS integration</i> • Modernization & Migration <ul style="list-style-type: none"> • <i>App re-architecture</i> • <i>Data migration</i> • <i>Infra re-architecture</i> • Testing <ul style="list-style-type: none"> • <i>Functional testing</i> • <i>Integration testing</i> • <i>Performance testing</i> • <i>Usability testing</i> 	<ul style="list-style-type: none"> • Service Desk <ul style="list-style-type: none"> • <i>Central help desk</i> • <i>Deskside support</i> • <i>Tech bar support</i> • <i>IT knowledge management</i> • <i>Request fulfillment</i> • Application Support <ul style="list-style-type: none"> • <i>Tier 2 app support (by app)</i> • <i>Tier 3 app support</i> • IT Training <ul style="list-style-type: none"> • <i>Off-the-shelf productivity training</i> • <i>Business application training</i> • Central Print <ul style="list-style-type: none"> • <i>Bill/invoice print</i> • <i>Publications</i> • <i>Automated post processing</i> 	<ul style="list-style-type: none"> • IT Service Management <ul style="list-style-type: none"> • <i>Incident management</i> • <i>Problem management</i> • <i>Change management</i> • <i>Asset management (CMDB)</i> • Event Management <ul style="list-style-type: none"> • <i>Network monitoring</i> • <i>System monitoring</i> • <i>Application monitoring</i> • <i>Usage analytics</i> • <i>Logging analytics</i> • Scheduling <ul style="list-style-type: none"> • <i>Batch processing</i> • Capacity Management <ul style="list-style-type: none"> • <i>Storage capacity</i> • <i>Compute capacity</i> • <i>Data Center capacity</i> • Deployment & Administration <ul style="list-style-type: none"> • <i>Software distribution</i> • <i>Config administration</i> • <i>Patch management</i> 	<ul style="list-style-type: none"> • <i>Identity & Access Management</i> <ul style="list-style-type: none"> • <i>Authentication/Authorization</i> • <i>Identity Management</i> • <i>Identity Governance & Administration</i> • <i>Privileged Access Management</i> • <i>Certificate Management</i> • <i>Security Awareness</i> <ul style="list-style-type: none"> • <i>Security Training</i> • <i>Security Advisory</i> • <i>Security Policies and procedures</i> • <i>Cyber Security & Incident Response</i> <ul style="list-style-type: none"> • <i>Cyber Security Monitoring</i> • <i>Security Incident Response</i> • <i>Threat & Vulnerability Management</i> <ul style="list-style-type: none"> • <i>Application Vulnerability Management</i> • <i>Infrastructure Vulnerability Management</i> • <i>Network/Endpoint Security</i> • <i>Data Privacy & Security</i> <ul style="list-style-type: none"> • <i>Data Classification & identification</i> • <i>Data loss prevention</i> • <i>Data encryption</i> • <i>Database security</i> • <i>Governance, Risk & Compliance</i> <ul style="list-style-type: none"> • <i>Risk management</i> • <i>Policy management</i> • <i>Policy tracking</i> • <i>Data governance</i> • <i>Business Continuity & Disaster Recovery</i> <ul style="list-style-type: none"> • <i>Business continuity policies</i> • <i>Business resiliency plans</i> • <i>DR procedures & exercises</i> • <i>DR facilities</i> • <i>Office continuity facilities</i>

NOTE: Italicized sub-entries under Solution names are representative (example) offerings. They are not to be considered standard offerings. They are used to illustrate the types of offerings or commercial products that often comprise a specific Solution.

Added new Application service:

- Development Platform

SOLUTIONS (v4.0)

Platform

Data

- Database
 - *Relational Database*
 - *Oracle DBMS*
 - *Microsoft SQL, RDS*
 - *Azure SQL Database*
 - *Non Relational database*
 - *Oracle NoSQL*
 - *MongoDB, Hadoop*
 - *Amazon DynamoDB*
 - *Azure DocumentDB*
- Distributed Cache
 - *Amazon ElasticCache*
 - *Azure Redis Cache*
- Data Management
 - *Extract, transform & load (ETL)*
 - *Data Quality*
 - *Data Cleansing*
 - *Master Data Management*
- Data Warehouse
 - *Central data warehouse*
 - *Operational data stores*
 - *Teradata*
 - *Amazon Redshift*
 - *Asure Data Warehouse, Data Catalog*
- Data Analytics & Visualizations
 - *Visual UI / BI tools*
 - *Geospatial analytics*
 - *Stream analytics*
 - *AWS Kinesis*
 - *Azure Stream Analytics*

Application

- Application Hosting
 - *Web Services*
 - *WebSphere, Tomcat*
 - *Azure App Service, Cloud Service*
- Development Platform
 - *Integrated development platform*
 - *IoT services*
 - *Ecommerce services*
- Foundation Platform
 - *ERP Administration platform*
 - *SaaS development platforms*
 - *SAP Basis*
 - *Oracle Cloud Platform*
 - *ServiceNow Now Platform*
 - *Salesforce.com Force.com*
 - *Appian*
- Message Bus & Integration
 - *Message bus*
 - *Task completion alerts*
 - *Threshold alerts*
 - *Notification & alerting*
- Content Management
 - *Records management*
 - *Web content management*
 - *Digital asset management*
- Search
 - *Site search, Application search*
 - *Google, Amazon Cloudsearch*
 - *Azure Search*
- Streaming
 - *Live Streaming*
 - *On-demand Streaming*
 - *On Demand Video Transcoder*
- Decision Intelligence & Automation
 - *Robotic automation*
 - *Machine learning*
 - *Intelligent virtual & personal assistant*
 - *Facial recognition*
 - *Predictive analytics*
 - *Natural language processing*

NOTE: Italicized sub-entries under Solution names are representative (example) offerings. They are not to be considered standard offerings. They are used to illustrate the types of offerings or commercial products that often comprise a specific Solution.

Infrastructure

Data Center

- Enterprise Data Center
 - *Owned & operated*
 - *Co-location*
 - *Tier 1, Tier 2, Tier 3, Tier 4*
 - *Shipping & receiving*
 - *Assembly*
 - *Rack & stack*
 - *Maintenance*
- Other Data Center
 - *Space & power*

Network

- Data Network
 - *Point to point (SONET, T1, T3)*
 - *MPLS, ATM*
 - *Local access (100Mbps, 1 GB fiber)*
 - *Satellite/non-terrestrial/microwave*
 - *Amazon Data Transfer*
- Voice Network
 - *POTS, 800 Service*
 - *Satellite/non-terrestrial, radio*
- Internet Connectivity
 - *SD-WAN*
 - *Internet access (Verizon, AT&T)*
 - *Network transit (Level 3, AT&T)*
- Virtual Private Network
 - *VPN, VLANs*
 - *Amazon Virtual Private Cloud*
- Domain Services
 - *Domain Name Services*
 - *Amazon Route 53*
- Load Balancing
 - *Network load balancing*
 - *Application load balancing*
 - *Amazon Elastic ComputeCloud*

Compute

- Physical Compute
 - *Large physical Windows server*
 - *Sun Solaris 15k*
 - *IBM AIX*
- Virtual Compute & Containers
 - *Xen, OpenStack, VMware*
 - *Compute/data/app containers*
 - *Docker, Mesosphere, Kubernetes*
 - *Amazon EC2*
 - *Amazon EC2 Container Service*
- Compute on Demand
 - *Xen, OpenStack, VMware*
 - *AWS – EC2, Auto Scaling*
 - *Azure – Virtual Machines*
 - *AWS – Lambda*
 - *Azure – Batch*
- Mainframe
 - *Transactional compute*
 - *Batch compute (peak-time)*
 - *Batch compute (off peak-time)*

Storage

- Networked Storage
 - *SAN, NAS, SSD*
 - *Tier 1, Tier 2, Tier 3*
 - *Amazon Elastic File Storage*
- File & Object Storage
 - *Low-cost storage*
 - *Amazon Simple Storage Service (S3)*
- Backup & Archive
 - *Disk backup (Symantec, HP, CA)*
 - *Data Domain*
 - *Tape backup*
 - *Optical backup*
 - *Off-site storage*
 - *Amazon Glacier*
- Distributed Storage (CDN)
 - *Akamai distributed storage*
 - *Amazon CloudFront*
 - *Azure CDN*

NOTE: Italicized sub-entries under Solution names are representative (example) offerings. They are not to be considered standard offerings. They are used to illustrate the types of offerings or commercial products that often comprise a specific Solution.

Workplace

Client Computing

- Computer
 - *Standard desktop*
 - *Developer workstation*
 - *Standard laptop*
 - *Ultra-portable laptop*
 - *Kiosk*
- Mobile
 - *Smartphone*
 - *Tablet*
 - *Smart watch*
- Bring Your Own Device
 - *Personal computer*
 - *Personal smartphone*
 - *Personal tablet*
- Virtual Client
 - *Virtual desktop*
 - *Virtual workspaces*
 - *Remote Applications*

Communication & Collaboration

- Collaboration
 - *Collaborative Workspace (SharePoint, OneDrive, eRoom, Centerstage, Dropbox, Amazon Workspaces/WorkDocs)*
- Communication
 - *Email – Exchange, Gmail, Amazon WorkMail*
 - *Messaging – IM, Lync, Slack*
 - *Social Communities – Facebook, Twitter*
 - *Conferencing – Zoom, Teams, WebEx, Audio, Video*
 - *Voice – TDMA, VoIP, cellular, voicemail*
- Productivity
 - *Software packages – MS Office, Office365, Google Docs, Amazon WorkDocs*
 - *Software application add-ons – Visio, Project, Adobe PageMaker, Adobe Suite*
- Print
 - *Desktop printer*
 - *Departmental multi-purpose printer (print/copy/fax/scan)*

Connectivity

- Network Access
 - *Local Ethernet port (“phone jack”)*
 - *Wireless connection (“WiFi”)*
 - *Guest wireless connection (limited)*
- Remote Access
 - *VPN Access (via internet)*
 - *Edge Networking*
 - *WiFi Hotspot*

NOTE: Italicized sub-entries under Solution names are representative (example) offerings. They are not to be considered standard offerings. They are used to illustrate the types of offerings or commercial products that often comprise a specific Solution.

Business *(representative, for generic company)*

Product Management	Sales & Marketing	Manufacturing & Delivery	Customer Service
<ul style="list-style-type: none"> • Product Development <ul style="list-style-type: none"> • <i>Innovation management</i> • <i>Computer-aided design (CAD)</i> • <i>Simulation visualization</i> • <i>Crowdsourcing</i> • Product Planning <ul style="list-style-type: none"> • <i>Requirements management</i> • <i>Product data management</i> • <i>Product analytics</i> • <i>Risk and compliance management</i> 	<ul style="list-style-type: none"> • Customer Analytics <ul style="list-style-type: none"> • <i>Digital analytics</i> • <i>Customer analytics</i> • <i>Voice of the Customer</i> • Marketing & Advertising <ul style="list-style-type: none"> • <i>Marketing automation</i> • <i>Online marketing</i> • <i>Mobile marketing</i> • <i>Ad technology</i> • Sales Force & Channel Management <ul style="list-style-type: none"> • <i>Sales force automation</i> • <i>Sales enablement & training</i> • <i>Partner relationship management</i> • <i>Pricing management</i> • Customer Sales <ul style="list-style-type: none"> • <i>Commerce solutions</i> • <i>In-store solutions (POS)</i> 	<ul style="list-style-type: none"> • Resource Planning <ul style="list-style-type: none"> • <i>Demand management</i> • <i>Supply chain management</i> • Manufacturing <ul style="list-style-type: none"> • <i>Manufacturing process management</i> • <i>Quality management</i> • Inventory & Warehousing <ul style="list-style-type: none"> • <i>Inventory management</i> • <i>Warehouse management</i> • Product Delivery <ul style="list-style-type: none"> • <i>Fleet management</i> • <i>Tracking systems</i> • <i>Digital asset management</i> • Service Delivery <ul style="list-style-type: none"> • <i>Engagement management</i> • <i>Professional services</i> • <i>Educational services</i> 	<ul style="list-style-type: none"> • Order Management <ul style="list-style-type: none"> • <i>Contract management</i> • <i>Order management</i> • <i>Invoicing</i> • <i>Payments</i> • Customer Care <ul style="list-style-type: none"> • <i>Multi-channel customer communication (ACD, CTI, IVR, Speech Recognition, chat, email, co-browse)</i> • <i>Knowledge Management</i> • <i>Customer service workforce automation</i> • <i>Field service</i> • <i>Customer service analytics</i>

NOTE: Italicized sub-entries under Solution names are representative (example) offerings. They are not to be considered standard offerings. They are used to illustrate the types of offerings or commercial products that often comprise a specific Solution.

Shared & Corporate

Finance	Workforce	Vendor & Procurement	Health, Safety, Security & Environment
<ul style="list-style-type: none"> • Planning & Management Accounting • Revenue Accounting • Accounts Receivable • General Accounting and Reporting • Project Accounting • Payroll & Time Reporting • Accounts Payable & Expense Reimbursement • Treasury • Tax 	<ul style="list-style-type: none"> • Recruitment • Employee Transitions & Separation • Workforce Management • Performance, Retention & Rewards Management • Benefits Management • Policy Management • Employee Development • Employee Communications & Relations 	<ul style="list-style-type: none"> • Sourcing & Procurement • Supplier Management • Contract Management 	<ul style="list-style-type: none"> • Policy & Governance • Oversight & Enforcement • Healthcare Services • Occupational Safety
Risk, Audit & Compliance	Legal	Property & Facility	Corporate Communication
<ul style="list-style-type: none"> • Risk Management • Breach Management & Remediation • Business Continuity Planning & Management • Auditing • Investigations • Records Management 	<ul style="list-style-type: none"> • Legal Counsel • Case Management • Contract Review 	<ul style="list-style-type: none"> • Development & Space Planning • Workspace Services • Physical Security • Operations, Maintenance, Repair & Improvements • Fleet Management (non-logistics) • Food & Beverage 	<ul style="list-style-type: none"> • Stakeholder Relations • Government Relations • External Communications • Community Outreach

NOTE: Italicized sub-entries under Solution names are representative (example) offerings. They are not to be considered standard offerings. They are used to illustrate the types of offerings or commercial products that often comprise a specific Solution.



**Next Steps & Potential
Focus Areas for 2021**

Next Steps

▶ Join **TBM Framework & Framework Community** on **TBMCouncil.org**:

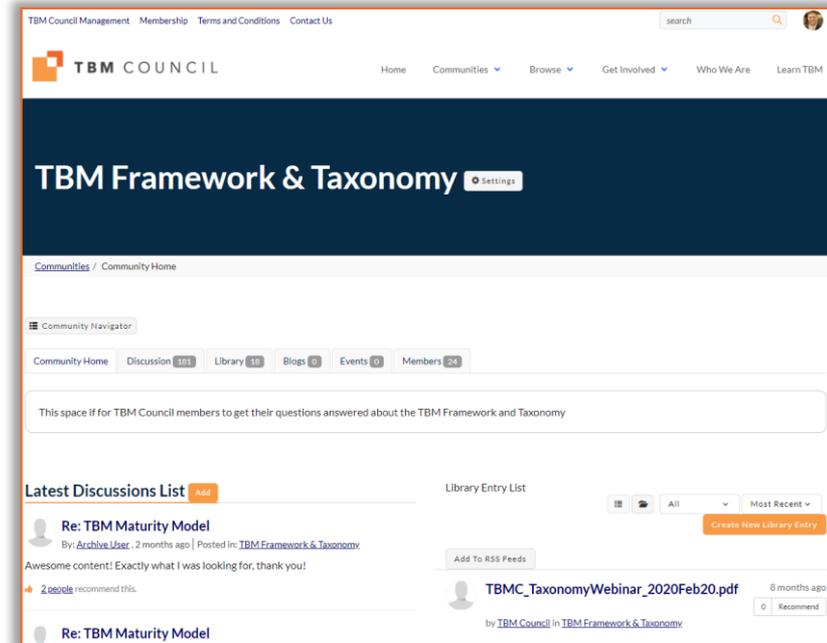
<https://community.tbmcouncil.org/communities/allcommunities>

NOTE: TBM Council membership required. Sign-up at: <https://community.tbmcouncil.org/membership>

We will post this and past meeting deliverables there.

▶ **Taxonomy v4.0 Draft artefacts will be posted by end of day November 20**

- Specifications document
- Slides with graphics
- Excel spreadsheet



Community Space for Taxonomy Artefacts
(see library)

Focus Areas

Please take **polls 5-6**.

Go to www.menti.com and use the code

56 95 96 7

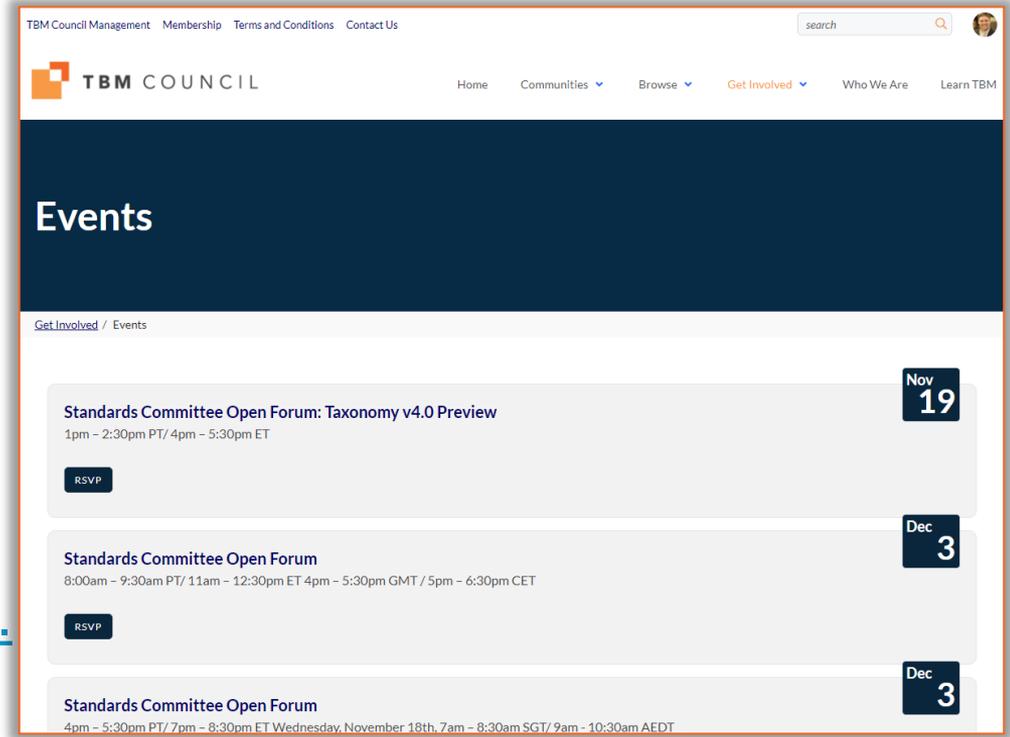
<https://www.menti.com/j2qosex859>



Mobile QR Code

Join Us December 3

- ▶ Focus areas to include:
 - Deeper dive into conceptual TBM model and archetypes
 - Open Q&A with Standards Committee members
 - Final updates to Taxonomy v4.0
- ▶ RSVP online at:
<https://community.tbmcouncil.org/get-involved/events>



The screenshot shows the TBM Council website's Events page. The header includes navigation links for TBM Council Management, Membership, Terms and Conditions, and Contact Us. The main navigation bar features the TBM COUNCIL logo and links for Home, Communities, Browse, Get Involved, Who We Are, and Learn TBM. The Events section is highlighted with a dark blue background. Below this, the page lists three events:

- Standards Committee Open Forum: Taxonomy v4.0 Preview** (Nov 19)
1pm - 2:30pm PT / 4pm - 5:30pm ET
- Standards Committee Open Forum** (Dec 3)
8:00am - 9:30am PT / 11am - 12:30pm ET 4pm - 5:30pm GMT / 5pm - 6:30pm CET
- Standards Committee Open Forum** (Dec 3)
4pm - 5:30pm PT / 7pm - 8:30pm ET Wednesday, November 18th, 7am - 8:30am SGT / 9am - 10:30am AEDT



Thank You!