Changes in version 13.0 (March, 2024)

- Copyright Page
  - Updated copyright information.
- Table of Contents
  - Renamed section 8.4.
- Part 1: Introduction
  - Updated contents to reflect renamed section 8.4, the International Development Organization Reference Model.
  - Updated section descriptions under part 8 to provide more scope of coverage clarity.
- Section 2.1: Strategy Mapping
  - Added domain element definitions for goal, objective, course of action, and change.
  - Updated mapping guideline #8, under figure 2.1.12, and added supporting text to highlight the intersection of product entitlement and value stream as a target of a strategic change.
  - Raised the profile of the “Change” domain element in mapping guideline #5 to accommodate the fact that it plays a defined role in strategy mapping, yet had limited explanation in prior releases.
  - Updated the strategy model in figure 2.1.14 to highlight that “course of action” can decompose into finer grain courses of action.
- Section 2.2: Capability Mapping
  - Updated principle #3 to provide more clarity in the example, changing the capability to Asset Risk Management for more specificity.
- Section 2.3 Organization Mapping
  - Updated metamodel to represent objective decomposition, which enables business unit owned objectives to roll up to higher level objectives being pursued at the enterprise level.
  - Clarified the metamodel text following figure 2.3.14 to indicate that organization in the metamodel equates to level 0 in the template.
- Section 2.4: Value Mapping
  - Added BIZBOK® Guide Glossary definition of value stream to the introduction section to synch up the section with the widely used definition in Appendix A.
  - Moved the Value Stream Mapping Template section, which includes figure 2.4.10, ahead of the Value Stream Detailed Mapping Steps section that references that template.
  - Generally provided more detailed mapping clarity by tying Value Stream Detailed Mapping Steps bullet points directly to the mapping template in figure 2.4.10.
Updated the Value Stream Detailed Mapping Steps section as follows:
- Provided more clarity on how to articulate a value stream by referencing the value stream template
- Clarified triggering and participating stakeholder mapping, including when it is valid to use stakeholder category as opposed to a specific stakeholder
- Removed value stream stage decomposition guideline; it is obsolete and, while allowable, not used or useful in practice

In cross-mapping guideline #4:
- Highlighted that a capability should not be cross-mapped just because information managed by that capability is required by another capability
- Referred this point to the section 2.5 discussion on capability-to-information concept cross-mapping

Section 2.5: Information Mapping
- Revised and clarified information concept relationship mapping Step 5, specifically:
  - Formalized when and when not to show related information concepts in the information map, removing and revising text that left the approach ambiguous
  - Updated the mapping example in figure 2.5.8 to highlight when and when not to show an information concept in the Related Concepts column of the template
  - Clarified relationship mapping approach that defines associations between primary and secondary information concepts
- Removed “stakeholder defines” relationship in information concept from metamodel diagram in figure 2.5.13 and updated supporting text for this figure.
  Note that corresponding changes were applied in sections 2.8 and 5.1.

Section 2.6: Initiative Mapping
- Removed the term “strategic” in front of the term “objective” given that determining whether an objective is strategic or tactical is not clearcut.
- Clarified initiative mapping guideline #1 to state that the step prioritizes mapping priorities, not initiative investment or execution priorities.
- Updated initiative mapping guideline #2 to accommodate situations where no candidate list of initiatives exists and the mapping team only has a list of goals and objectives.
- Reworked guideline #5 to clarify the approach to mapping initiatives to value stream stages as a step towards identifying capabilities in guideline #6.
- Added new guideline #8 to leverage performance metric analysis as input to prioritizing and triaging initiative candidates, with reference to BIZBOK® Guide section 3.7 metrics.
- Dialed back references to roadmaps until such time that the section can be updated to provide more roadmap related examples.
- Provided more clarity in the text contained in the section titled Framing Scope, Building Inventory.
- Updated figure 2.6.9 so that the capabilities align to BIZBOK® Guide principles.
- Clarified text following figure 2.6.14 to highlight the role of value streams in initiative planning.
- Updated metamodel view in figure 2.6.16 along with supporting text to highlight that:
  - Objective decomposes into finer grain objectives, reflecting the model defined in BIZBOK® Guide section 2.1
  - Course of action decomposes into finer grain courses of action, reflecting the model defined in BIZBOK® Guide section 2.1
- Revised Summary section to align it with best practices.

- Section 2.7: Product Mapping
  - Generally, updated section as required to accommodate expanded and new product mapping templates and related guidelines.
  - Added a benefit statement titled “Establishes a clear focal point for optimizing customer service offerings”.
  - Added product mapping team roles of product designer and tasks including product conceptualization and design.
  - Clarified product mapping guideline #1 to highlight expansiveness of product mapping scope.
  - Moved paragraph beginning with “Capabilities play a dual role in the life and value of a product…” in front of section titled “Product Entitlement Mapping”.
  - Renamed section previously titled “Product/Capability Mapping” to “Product Entitlement Mapping” in order to refocus capability enablement discussion on product entitlements.
  - Product entitlement mapping section was enhanced as follows:
    - Emphasized the role of product entitlement in (end) customer service delivery
    - Replaced product/capability cross-mapping template in figure 2.7.8 with product/entitlement mapping template*
    - Added additional text and 6 new product entitlement mapping guidelines to explain how entitlements and descriptions are formed
    - Replaced figure 2.7.9 with product entitlement examples for 4 products
  - Added new mapping guidance, including:
    - Product entitlement formulation guidelines
    - Product entitlement-to-capability cross-mapping guidelines
  - Added new figure 2.7.10 depicting examples of product entitlements and related descriptions.
o Revised figure 2.7.10 (now 2.7.11) to replace product/capability mapping examples with product entitlement/capability mapping examples for a single product with 10 sample entitlements.

o Provided additional language discussing how to leverage product entitlement mapping in practice.

o Added new figure 2.7.12 aligning product entitlement delivery through the lens of a value stream, enabled by the same capabilities that enable product entitlements, with the intent of describing how improving customer services is linked directly to customer value delivery in practice.

o Updated description of figure 2.7.13 (previously 2.7.11) for entitlement coverage.

o Updated metamodel figure 2.7.16 at the end of section to show that:
  o Initiatives can decompose into initiatives
  o Product “contains” Product Entitlement, where it previously said “may contain”
  o Updated textual discussion to accommodate edits applied to the model in figure 2.7.16.

*Template update was also applied to mapping template v9.1, posted in the members-only section of the Guild website.

o Section 2.8: Stakeholder Mapping

  o Provided in-line definitions on first page for Customer, Partner, and Human Resource.
  o Updated mapping principle #4 to clarify stakeholder relationship to information concept.
  o Added previously missing stakeholder category definition under figure 2.8.2.
  o Clarified stakeholder mapping guidelines #8 for defining a stakeholder.
  o Removed “defines” language from mapping guideline #11 as it was removed from the metamodel view as too operational to maintain.
  o Following guideline #12, clarified use of the stakeholder category in a value stream with additional category mapping guidelines to standard use of category in practice, which was missing from prior release.
  o Updated figure 2.8.4 to clarify cross-mapped associations among stakeholder map capability map, and information map.
  o Under usage scenarios, changed case management reference to dynamic rules-based routing, which is the specific practice highlighted under this scenario and defined in BIZBOK® Guide section 3.5.
  o Updated stakeholder metamodel in figure 2.8.5 as follows:
    o Removed stakeholder “defines” information concept relationship as it is no longer required based on the addition of stakeholder category
    o Added “stakeholder category” as a domain element
o Added stakeholder category “classifies” stakeholder relationship
o Added stakeholder category “represented as” information concept relationship
o Update accompanying text to explain the model changes in the figure.

- Section 2.9: Policy Mapping
  - Clarified mapping guideline #6 to:
    - Removed the word capability in the guideline as there is no such capability
    - Provided guiding text on creating a policy mapping role
  - Updated policy metamodel view in figure 2.9.3 to show objectives decomposing into objectives, aligning the model with section 2.1.
  - Added clarity behind this update in accompanying text.

- Section 3.3: Business Architecture & Business Models
  - Overall, edited the section end-to-end to make it more readable.
  - In the introduction:
    - Replaced the reference to design thinking, which was not referenced hence, with strategy execution, a business architecture focal point
    - Clarified which scenarios are covered in section 3.3
  - Reworked the descriptions in figure 3.3.2.
  - Clarified policy mapping principles, including adding terms like course of action.
  - Updated figure 3.3.4:
    - Replaced the term “concepts” with “domains” to align to Guild framework
    - Added Business Unit to Key Partnerships domain match
  - Updated capability references to align them to BIZBOK® Guide principles and best practices, replacing misaligned terms with business object-based capabilities.
  - Reworked figures 3.3.6 and 3.3.7, replacing:
    - Environmental Safety Management with Operation Risk Management
    - Financial Resources Management with Finance Management
    - Human Resources Management with Human Resource Management and Training Management
    - Knowledge Management with Content Management and Information Management
    - Marketing Management with Campaign Management and Market Management
    - Product and Services Management with Product Management
    - Property Management with Asset Management*
    *Property Management could extend to Facility and Geographic Space but was simplified for purposes of the scenario discussion.
  - Updated figure 3.3.11 to point to updated business architecture domain map figures.

- Section 3.7: Business Architecture and Business Performance Management
- Added a new benefit for “Prioritizing initiative investment targets”.
- Updated “action item” to “course of action” as now adopted in strategy mapping.
- Added new principle #9 to highlight investment prioritization rationale.
- Reordered metric discussions, placing effectiveness and impact rating first based on these metrics being most relevant to an assessment.
- Changed breadth of coverage from value streams, capabilities, people, and organization to value stream stages, business units, and products.
  - Coverage is determined by the number of capability references in context of other domains; therefore, capability was removed from the list
  - People category, being an operating model concept, was eliminated
  - Impact points that remain include those domains that have a direct relationship to capability, specifically value stream stage, business unit, and product
- Updated metric related text for clarity and to keep it up to date with other sections.
- Updated Content Management capability definition from CRM v6.0.1.
- Updated language related to the assessment example.
- Section 3.8: Business Architecture and Requirements Analysis
  - Corrected a typo on bottom of the first page, “object” to “objective”.
  - Updated metamodel figure 3.8.6 to show objective decomposition and initiative decomposition, aligning them to related domain models.
  - Updated the text following figure 3.8.6 to explain the new relationships.
- Section 5.1: Business Architecture Knowledgebase
  - Removed “Stakeholder defines Information Concept” relationship from model in figure 5.1.2, aligning it to updates in sections 2.5 and 2.8.
  - Added a reference to recently approved metamodel standard, the Business Architecture Core Metamodel (BACM) from the Object Management Group.
- Section 6.5: Business Architecture and Service-Oriented Architecture Alignment
  - Added a new alignment benefit to list indicating that business object-based capabilities deliver more reusable, scalable, and interoperable software deployments.
  - Added language on the importance of leveraging object-based capabilities as a domain source in domain-driven design, given that the current practice does not always pursue this approach.
- Part 8.0 Reference Models
  - Updated section 8.4 name and reference to International Development Organization.
- Section 8.1 Financial Services Reference Model
  - Capability mapping section
    - Updated figure 8.1.1: Financial Services Industry Level 1 Capability Map
- Clarified in the last paragraph prior to figure 8.1.2 that the level 2 capabilities apply only to the Finance Management capabilities pertinent to the financial services industry
- Value stream mapping section
  - Updated figure 8.1.3: Financial Services Industry Value Streams
  - Updated narrative regarding examples using Establish Financial Agreement value stream and clarification on the stages for broader users
  - Applied minor language updates to figure 8.1.6: Execute Financial Transaction Value Stream Cross Mapping
  - Updated value stream stage name for figure 8.1.7: Settle Payment Obligation Value Stream
  - Added language to encourage use of the downloadable reference model after figure 8.1.8 for the Trade Financial Instrument Value Stream
- Information mapping section
  - Revised figure 8.1.9: Financial Services Industry Information Map as follows:
    - Updated Business Entity’s definition, types and states
    - Updated Plan’s definition, and types
    - Updated Strategy’s definition, types and states
    - Changed Action Item to Course of Action and the definition, types and states
    - Updated Agreement’s types
    - Updated the Order’s definition and related concepts
    - Updated Human Resources’ definition and type
    - Updated Incident’s state
    - Updated Inquiry’s states
    - Updated Event’s types and states
- Section 8.2 Manufacturing Reference Model
  - Revised capability content as follows
    - Updated Business Entity Management definition
    - Updated Plan Management definition
    - Updated Strategy Management definition
    - Updated Order Management definition
    - Updated Human Resource Management definition
    - Updated Inquiry Management definition
  - Replaced capability figure 8.2.2.
  - Revised value stream content as follows:
Updated figure 8.2.4
Updated Acquire Material value stream entrance and exit criteria columns
Updated Acquire Product value stream stakeholder column
Updated Optimize Asset and Material Inventory stage 1 exit criteria
Replaced value stream diagrams in figure 8.2.4.
Updated value stream figures 8.2.6, 8.2.7, 8.2.10, 8.2.11, 8.2.12, and 8.2.14.
Revised information concept content as follows:
Updated Facility definition
Updated Incident definition
Updated Order definition
Updated Product definition
Revised information map in figure 8.2.15.
Revised stakeholder content as follows:
Updated Asset Manager description
Updated Facility Manager description
Updated Operations Manager description
Updated Supplier description
Revised stakeholder map in figure 8.2.16.
Section 8.3 Healthcare Reference Model
Revised capability content as follows:
Updated Business Entity Management definition
Updated Plan Management definition
Updated Strategy Management definition
Updated Accreditation Management
Updated Health Condition Management definition
Updated Order Management definition
Updated Inquiry Management definition
Revised value stream content as follows:
Updated figure 8.3.5
Updated figure 8.3.7
Section 8.4: International Development Organization Reference Model
All content in this section was updated to replace the member organization reference model content with the new international development organization (IDO) reference model content.
New section focuses on mission-based versus profit-driven organizations, where a key stakeholder category is the beneficiary versus the concept of customer.
Section includes IDO capability map, values streams, and an information map.
Section 8.5 Insurance Reference Model
Revised capability content as follows:
- Updated Business Entity Management definition
- Updated Plan Management definition
- Updated Research Management definition
- Updated Strategy Management definition
- Updated Accreditation Management definition
- Updated Order Management definition
- Updated Human Resource Management definition
- Updated Inquiry Management definition

Revised information concept content as follows:
- Updated Order definition

Section 8.6 Common Reference Model
- Updated capability figure 8.6.1.
- Revised capability content as follows:
  - Updated Business Entity Management definition
  - Updated Plan Management definition
  - Updated Research Management definition
  - Updated Strategy Management definition
  - Updated Order Management definition
  - Updated Human Resource Management definition
  - Updated Inquiry Management definition
  - Added Accreditation Management
  - Updated Work Management definition

Revised value stream content as follows:
- Added Resolve Incident value stream
- Added Resolve Inquiry value stream
- Updated value stream figure 8.6.3.

Revised information concept content as follows:
- Updated Agreement types
- Updated Business Entity definition, types, and states
- Updated Content definition
- Updated Human Resource definition and types
- Updated Incident states
- Updated Inquiry definition and states
- Added Accreditation
- Updated Order definition, types, related information concept and states
- Added Order Item
- Updated Plan definition and types
Updated Strategy definition, types, related information concepts, and states
Updated Vision types and states
Updated Goal types and states
Updated Action Item renamed to Course of Action; definition, types, and states
Updated Submission definition

Section 8.7 Transportation Reference Model
Replaced figure 8.7.1, Capability Map, to include new capability, Accreditation Management.
Revised Capability content as follows:
  Updated Business Entity Management description
  Updated Plan Management description
  Updated Strategy Management description
  Added new capability, Accreditation Management
  Updated Content Management description
  Updated Inquiry Management description
  Updated Order Management description

Revised Value Stream content as follows:
  Added Reference to Resolve Inquiry
  Updated Execute Route descriptions and exit criteria
  Updated Send Shipment entry and exit criteria

Revised Stakeholder content as follows:
  Updated Constituent description
  Changed Recipient to Shipment Recipient
  Changed Sender to Shipment Sender
  Removed Shipment Planner

Revised Information Map content as follows:
  Added Accreditation concept
  Updated Agreement concept type
  Added Business Entity concept
  Updated Event definition
  Added Human Resource concept
  Updated Incident definition and concept states
  Added Initiative concept
  Added Inquiry concept
  Updated Order definition, concept types, and concept states
  Added Order Item secondary concept
  Added Plan concept
  Added Route Segment secondary concept
Added Strategy concept
- Added Vision, Goal, Objective and Course of Action secondary concepts
- Added Trip Segment secondary concept

Section 8.8 Government Reference Model
- Revised capability content as follows:
  - Updated Accreditation Management definition
  - Updated Bio-Organism Management renamed Biological Organism Management
  - Updated Content Management definition
  - Updated Event Management definition
  - Updated Evidence Management definition
  - Updated Health Condition Management definition
  - Updated Human Resource Management definition
  - Updated Incident Management definition
  - Updated Initiative Management definition
  - Updated Interaction Management definition
  - Updated Inquiry Management definition
  - Updated Order Management definition
  - Renamed Natural Resources Management to Natural Resource Management
  - Updated Policy Management definition
  - Updated Research Management definition
  - Updated Schedule Management definition
  - Updated Strategy Management definition
  - Updated Work Management definition
- Removed Cadaster Management capability, it being non-object based
- Updated multiple business object overviews including:
  - Constituent and Customer
  - Geographic Space, Location, and Geographic Border
  - Government Service
  - Initiative
- Revised information map in figure 8.8.13 as follows:
  - Updated Accreditation: Information Concept Definition
  - Updated Agreement: Information Concept Types, Related Information Concepts
  - Replaced Biological Organism with Bio Organism
  - Updated Biological Organism: Related Information Concepts
  - Removed Cadaster, it being non-object based
  - Updated Case: Related Information Concepts
  - Updated Claim: Related Information Concepts
  - Updated Constituent: Related Information Concepts
Updated Decision: Related Information Concepts
Updated Energy: Related Information Concepts
Updated Evidence: Information Concept Definition and Related Information Concepts
Updated Financial Transaction: Related Information Concepts
Updated Geographic Space: Related Information Concepts
Updated Government Service: Related Information Concepts
Updated Health Condition: Information Concept Definition, Information Concept Types, Related Information Concepts, Information Concept States
Updated Initiative: Information Concept Definition, Information Concept Types, Related Information Concepts, Information Concept States
Updated Infrastructure: Related Information Concepts
Updated Investment Portfolio: Related Information Concepts
Updated Language: Related Information Concepts
Updated Legislation: Related Information Concepts
Updated License: Related Information Concepts
Updated Market: Related Information Concepts
Updated Material: Related Information Concepts
Updated Natural Resources: Related Information Concepts
Updated Operation: Related Information Concepts
Updated Policy: Information Concept Definition, Related Information Concepts
Updated Public Sector Entity: Related Information Concepts
Updated Research: Related Information Concepts and Information Concept States
Updated Strategy: Information Concept Definition, Related Information Concepts, Information Concept States
Updated Training Course: Related Information Concepts, Information Concept States
Updated Vote: Related Information Concepts

Section 8.9 Telecommunications Reference Model
Replaced Level 1 capability map figure 8.9.1.
Revised capability content as follows:
Updated Business Entity Management definition
Updated Investment Portfolio Management definition
Updated Plan Management definition
Updated Policy Management definition
Updated Research Management definition
Updated Strategy Management definition
- Updated Conveyor Management definition
- Updated Customer Management definition
- Updated Geographic Space Management definition
- Updated Order Management definition
- Added Accreditation Management
- Updated Event Management definition
- Updated Human Resource Management definition
- Updated Incident Management definition
- Updated Inquiry Management definition
- Replaced Level 1 capability list figure 8.9.2.
- Revised value stream content as follows:
  - Updated figure 8.9.3
  - Replaced figure 8.9.4
  - Updated figure 8.9.5
  - Added Utilize Telecom Service value stream section
  - Added figure 8.9.14
- Replaced value stream diagrams in figure 8.9.4.
- Revised information concept content as follows:
  - Updated Business Entity definition
  - Added Geographic Space definition
  - Added Initiative definition
  - Added Inquiry definition
  - Added License definition
  - Added Operation definition
  - Updated Order definition
  - Added Strategy definition
- Revised information map in figure 8.9.15
- Revised stakeholder content as follows:
  - Updated Asset Manager description
  - Updated Facility Manager description
  - Updated Operations Manager description
  - Updated Supplier description
- Appendix A: Glossary
  - Added a definition of “change”, as defined in section 2.1.
  - Added a definition of “requirement”, derived from the definition in section 3.8.
  - Added a definition of “stakeholder category”, which was added to section 2.8.
  - Updated the source of the “value stream” definition to cite the original source from The Great Transition, published 1995.
o Added a definition of “vision”.
o Removed all citations referencing BusinessDictionary.com, given that this source is no longer available.
o Appendix B.4
  o Updated Business Architecture Metamodel Guide to align to the update applied in section v2.1.
o Appendix D: Version History
  o Updated to reflect changes in BIZBOK® Guide v13.0.
o Appendix E: Editorial Board and Contributors
  o Added new primary and secondary contributors.
o Updated Editorial Board and Board of Directors lists.