
**Document management — Strategy
markup language (StratML) —**

**Part 1:
StratML core elements**

*Gestion de documents — Langage de marquage de stratégie
(StratML) —*

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Partie 1: Éléments principaux du StratML
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Published in Switzerland

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the WTO principles in the Technical Barriers to Trade (TBT), see the following URL: [Foreword — Supplementary information](#).

The committee responsible for this document is ISO/TC 171, *Document Management Applications*, Subcommittee SC 2, *Application Issues*.

ISO 17469 consists of the following parts, under the general title *Document management — Strategy markup language (StratML)*:

— *Part 1: StratML core elements*

Introduction

This International Standard formalizes the practice that is commonly accepted but often implemented inconsistently. It will enable efficient discovery, sharing, and analysis of the information commonly contained in the strategic plans of organizations worldwide. While other initiatives have been mounted to compile abstract and theoretical models of the strategic planning process, this is the first to enable the concept of “strategic alignment” to be realized on the Web, through literal hypertext linkages to goal and objective statements.

NOTE For example, see the Business Motivation Model compiled by the Business Rules Group.

This is the first of a planned multipart International Standard. It specifies the elements that are common and deemed to be essential for inclusion in strategic plans. ISO 17469-2 will specify the extensions to the core that are deemed essential for inclusion in performance plans and reports. ISO 17469-3 and perhaps additional parts will include further extensions encompassing elements that, while not essential, can add value to the core elements and can be required for more specialized purposes, e.g. identifying the methodology and assessing the quality of the processes used to identify strategic goals and objectives as well as stakeholders.

NOTE 1 U.S. federal agencies are required by the Government Performance and Results Act (GPRA) to compile and maintain strategic plans. OMB Circular A-119 directs agencies to use international voluntary consensus standards as applicable.

NOTE 2 As documented on Wikipedia, two [situational/environmental analysis](#) methodologies for identifying goals and objectives include [SWOT](#) and [PESTLE](#).

The purposes of StratML include the following:

- Facilitate the sharing, referencing, indexing, discovering, linking, reusing, and analysing of the elements of strategic plans, including goal and objective statements as well as the names and descriptions of stakeholder groups and any other content commonly included in strategic plans.
- Enable the concept of “strategic alignment” to be realized in literal linkages among goal and objective statements and all other records created by organizations in the routine course of their business processes.
- Facilitate the discovery of potential performance partners who share common goals and objectives and/or either produce inputs needed or require outputs produced by the organization compiling the strategic plan.
- Facilitate stakeholder feedback on strategic goals and objectives.
- Facilitate updating and maintenance of discrete elements of strategic plans without requiring review and approval of the entire plan through bureaucratic channels, thereby helping to make the strategic planning process more agile and responsive to stakeholder feedback and changing circumstances, thus, helping to overcome the tendency of strategic plans to become outdated “shelfware”.
- Reduce the time, effort, inconsistencies, and delays associated with maintaining goal and objective statements redundantly in myriad “stovepipe” systems rather than referencing the authoritative sources.
- Build upon content management and emerging social networking technologies to enable creation of the *Strategic Semantic Web* comprising a worldwide network of intents (goals and objectives) as well as organizational values and stakeholders.

Value-added intermediaries will be free to apply style sheets to display the information in any manner desired by their stakeholders on computer screens and other devices as well as in print media. The primary way in which this International Standard will impact the quality of plans will be by facilitating feedback from stakeholders. However, by specifying kinds of information to include the International Standard will enable planners and intermediary service providers to focus more directly and intensively on the quality of the information itself.

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Document management — Strategy markup language (StratML) —

Part 1: StratML core elements

1 Scope

This International Standard specifies an Extensible Markup Language (XML) vocabulary and schema (XSD) for the elements that are common and considered to be part of the essential core of the strategic plans of all organizations worldwide.

This International Standard will not address

- how the information contained in strategic and performance plans and reports should be presented,
- specify font sizes or colours, page margins or numbering, or how graphics should be displayed, and
- provide guidance on how to compile high-quality plans, beyond specifying the basic elements that they should contain.

2 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

2.1

performance plan

document identifying inputs and processes required to accomplish objectives and establishing metrics by which progress will be assessed within a single budgetary planning and resource allocation cycle

2.2

strategic plan

document identifying goals and objectives to be pursued by an organization over a multi-year period, typically three to five years, in support of its mission and being consistent with its values

2.3

XSD

XML schema definition

specifies how to formally describe the elements in an XML document that define a shared vocabulary

[SOURCE: World Wide Web Consortium (W3C)]

3 Strategy markup language

3.1 General

This International Standard specifies two kinds of elements: 1) the StratML core itself, and 2) administrative metadata providing a minimal amount of useful information about the core. The essence of the International Standard is contained in the core. An <OtherInformation> element is also specified as a catch-all for information that is not more expressly addressed in other elements of the schema.

3.2 StratML core

3.2.1 General

The following seven elements, together with their child elements, comprise the StratML Core.

- <Organization>
- <Mission>
- <Vision>
- <Value>
- <Goal>
- <Objective>
- <Stakeholder>

Each of those elements and their children are defined in the following tables. Appropriately, examples are provided and alternate element names are listed, together with terms that have broader and narrower meanings or are otherwise related. Usage notes provide additional guidance. At a minimum, to be considered valid, a StratML document shall contain the name of the plan and at least one goal statement.

NOTE In hierarchical data structures like StratML, the relationship between upper level elements and lower level elements is commonly called a parent-child relationship or, more technically speaking, a subtype-supertype relationship.

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3.2.2 Organization

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Concept: Organization https://standards.iteh.ai/catalog/standards/sist/13807a9a-e3ed-4c51-b60a-0322491fd2c6/iso-17469-1-2015	
Preferred term	Organization
Alternate terms	Agency, Company, Institution, Charity, Person
Definition	The legal or logical entity to which the plan or report applies.
Usage note	While the plan itself must be named and can have only one name, use of this element is optional and repeatable to enable identification of as many organizations as may be involved in pursuit of the goals and objectives it contains. In addition to organizations, individuals can also use StratML to document their goals, objectives, and stakeholders.
Examples	AIIM Government Printing Office United Nations
Narrower terms	Department, Division, Regional Office, Program Office, Project Office, Sub-organization
Broader terms	Consortium, Partnership, Alliance, Public, or Private

3.2.3 Name

Concept: Name	
Preferred term	Name
Alternate term	Moniker

Definition	A word or short phrase intended to identify a concept within the context in which it is being applied.
Usage note	This element is a child of Organization, Value, Goal, Objective, and Stakeholder as well as the root element of the plan. It is commonly paired with the Description element.
Example	See the examples for Organization, Value, and Stakeholder. (The examples provided for Goal and Objective are descriptions rather than names.)
Narrower terms	None
Broader terms	Description

3.2.4 Description

Concept: Description	
Preferred term	Description
Alternate terms	Explanation, Definition
Definition	A sentence or short paragraph defining and explaining a concept.
Usage note	This element is a child of Organization, Value, Goal, Objective and Stakeholder as well as the root element of the plan. It is commonly paired with the Name element.
Example	N/A
Narrower terms	Name (standards.iteh.ai)
Broader terms	None

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3.2.5 Acronym <https://standards.iteh.ai/catalog/standards/sist/13807a9a-e3ed-4c51-b60a-0322491fd2c6/iso-17469-1-2015>

Concept: Acronym	
Preferred term	Acronym
Alternate terms	None
Definition	An abbreviation of a proper name, usually composed of the first letters of each word in the name.
Usage note	This element is a child of Organization.
Example	GPO AIIM (formerly known as the Association for Information and Image Management)
Narrower terms	None
Broader terms	None

3.2.6 Mission

Concept: Mission	
Preferred term	Mission
Alternate terms	Purpose
Definition	A brief description of the basic purpose of the organization.
Usage note	While use of this element is optional, good practice dictates that it should be included.

Example	Eliminate world hunger.
Narrower terms	Goal, Program, Project
Broader terms	None

3.2.7 Vision

Concept: Vision	
Preferred term	Vision
Alternate terms	None
Definition	A concise and inspirational statement implicitly relating an organization's purpose to its values, thus motivating its actions toward a future state it strives to achieve.
Usage note	While use of this element is optional, good practice dictates that it should be included.
Example	A world in which no child goes to sleep hungry.
Narrower terms	Value
Broader terms	None

3.2.8 Value

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Concept: Value	
Preferred term	Value
Alternate terms	Principle, Ideal
Definition	A principle that is important and helps to define the essential character of the organization.
Usage note	While use of this element is optional, good practice dictates that it should be included. It is repeatable to enable identification of as many values as may be appropriate.
Examples	honesty, integrity, diligence, compassion, tolerance, trust, moderation, freedom, self-expression, innovation
Narrower terms	None
Broader terms	Vision

3.2.9 Goal

Concept: Goal	
Preferred term	Goal
Alternate terms	General Goal, Aim
Definition	A relatively broad statement of intended results to be achieved over more than one resource allocation and performance measurement cycle.
Usage note	At least one occurrence of this element must be included in order for a document to be considered to be a strategic plan. It is repeatable to enable identification of as many goals as may be appropriate.
Example	Reduce hunger in the United States by 50 percent by 2012.
Narrower terms	Objective
Broader terms	Mission, Vision

Related terms	Aim
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3.2.10 Objective

Concept: Objective	
Preferred term	Objective
Alternate terms	Performance goal
Definition	A target level of results against which achievement is to be measured within a single resource allocation and performance execution cycle.
Usage note	While use of this element is optional in strategic plans, at least one measurable objective must be specified in a performance plan and most organizations will want to specify multiple objectives in their strategic plans as well.
Example	Serve healthy breakfasts to an average of 500 underprivileged children in Montgomery County, Maryland, each day during the year 2008.
Narrower terms	Task, Activity
Broader terms	Goal

3.2.11 Stakeholder

Concept: Stakeholder	
Preferred term	Stakeholder
Alternate terms	Beneficiary, Partner
Definition	An individual whose interests can be affected by or whose action can be required in order to achieve a goal or objective.
Usage note	<p>Stakeholders can be of the beneficiary or performer type. In some cases, individuals should be named, such as to identify stakeholders who are managers or leaders responsible for achieving the goal or objective. However, in most cases, groups of stakeholders will be generically named, particularly stakeholders of the beneficiary type. Use of this element will enable discovery as well as tracking of organizational performance in achieving goals and objectives based upon the stakeholder groups to which they apply.</p> <p>Stakeholders can also be typed as individuals, organizations, or generic groups.</p> <p>While use of this element is optional, good practice dictates that it should be used at the objective level. It is repeatable to enable identification of as many stakeholders as may be appropriate.</p> <p>Stakeholders can also be identified more generically at the goal and plan levels, particularly if they are the same for all objectives. However, preferred practice is to associate Stakeholders with each Objective individually.</p>
Examples	senior citizens, children, low-income citizens, students, project manager, program manager, task leader, team member, partner, Adam Schwartz, Owen Ambur, StratML committee members
Narrower terms	Individual, Organization, Generic_Group
Broader terms	None

3.2.12 Identifier

Concept: Identifier	
Preferred term	Identifier