INTERNATIONAL STANDARD

ISO 17469-1

First edition
2015-02-15

Document management — Strategy markup language (StratML) —

Part 1: StratML core elements

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

Partie 1: Éléments principaux du StratML

Reference number
ISO 17469-1:2015(E)

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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*

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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.

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