



beta™



business excellence through action
taster workbook



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THE TASTER WORKBOOK

beta™ – business excellence through action

This workbook has been produced by the UK Excellence Federation to provide an introduction to the beta™ service.

It incorporates extracts from the beta™ workbook and provides examples of how the workbooks are completed and used.

The beta™ service comprises of two phases.

The first, the diagnostic phase, takes one day, with a team of between 6 and 10 people from the organisation carrying out a perception based diagnosis of their organisation, completing the sections of the workbook. They then work together to identify and agree those issues that need to be addressed as the start of their continuous improvement activities.

The second phase, comprising a half day action planning workshop, takes place about one week later. At this workshop the same team review the outputs from the diagnostic phase and then work together to produce action plans to enable them to take forward the agreed improvement activities.

Full information on the beta™ service and other services available, please contact your local UK Excellence Federation member organisation.



OUTLINE OF THE SERVICE

Aim of the programme

To help businesses to develop realistic plans for improvement.

Objectives

By the end of this programme, participants will have:

- identified the business's strengths
- generated ideas for improvement
- prioritised and agreed the key areas for action
- created relevant and realistic action plans
- agreed who needs to do what and by when
- identified measurable outcomes
- agreed how progress will be monitored

The programme

The programme is designed to be delivered through one and a half days of workshops spread over a one to two week period. It has two phases which are outlined below:

Diagnosis

through which the participants will agree:

- what their business does well
- ideas for improvement in their business
- grading (if required)
- key areas for action
- next steps

Action planning

through which the participants will agree:

- relevant and realistic action plans
- who needs to do what and when
- measurable outcomes
- how progress will be achieved and reviewed

The diagnostic phase

Introduction and completion of this workbook, and discussion with your team to agree what your business does well and what it should improve



The action planning phase

To plan how you will address the important issues that have emerged



THE DIAGNOSTIC PHASE

Aim

To agree a common view of the business.

Objectives

By the end of this phase, the participants will agree:

- what their business does well
- ideas for improvement in their business
- grading (if required)
- key areas for action
- next steps

Outline programme

The diagnostic phase will generally follow one of two paths. It may be completed in a single day, or may involve an introductory session followed by individual completion of the workbooks in preparation for a diagnostic workshop a few days later. The paths are outlined below. The detailed arrangements will be designed to suit each client's needs. However, whichever path is followed, the total time spent in the diagnostic phase should be approximately one day.

The one stage path

Introductions

Using the workbook:
a brief introduction

Exploring the business
– reaching agreement (with
workbooks completed section
by section during the day)

Next steps

The two stage path

Introductions

Using the workbook: detailed
preparation, optionally including
case studies

Clarification of terms

Questions and answers

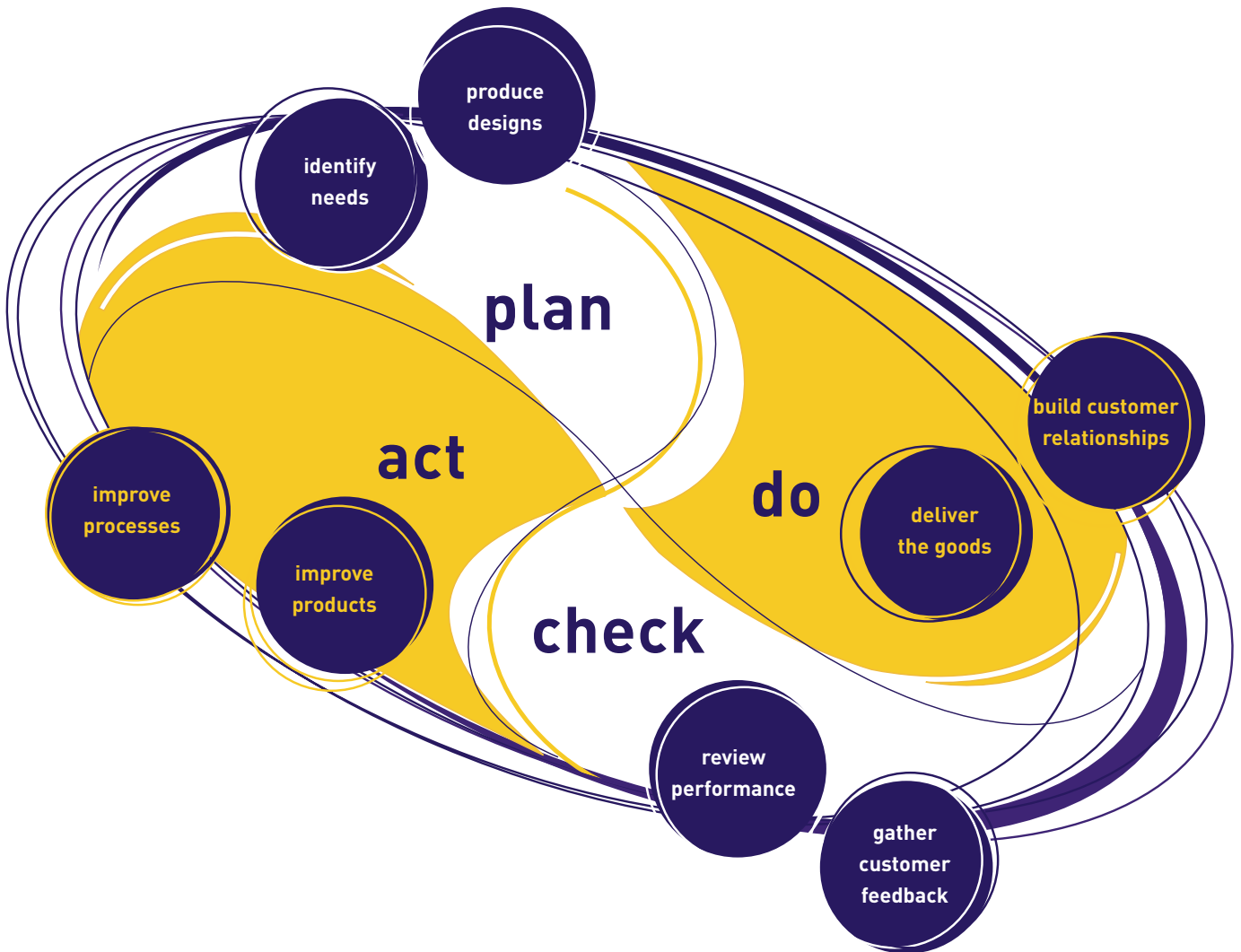
*Individual completion
of the workbook*

Introductions

Issues arising from the
preparatory work

Exploring the business
– reaching agreement

Next steps



In this section we consider how we design and deliver our products and services, developing and supporting our customer relationships through consistent, well managed processes.

Our customers are the people who use the products and/or services we produce.

A process is a sequence of activities which adds value by producing the outputs we need from a variety of inputs.



CASE STUDY

Widgets Ltd

Introduction

This short case study outlines some of the current issues facing Widgets Ltd. You are using beta™ to help explore the issues and identify and prioritise improvement actions.

Please read this through and use the workbook to note down ideas about what Widgets Ltd do well and ideas for improvement using the Processes section of the workbook provided. You may like to grade the statements.

What ideas for improvement does this review spark for you?

Share some of your ideas with your colleagues around your table.

The company

Widgets Ltd manufacture and service widgets. Widgets developed from an innovative idea in the early 1990's and the early years were characterised by strong growth in the market. ISO9000 registration was achieved in 1995 and has been maintained since that date. Working procedures are well defined and non-conformities are often used to improve the processes.

The Widgets have historically held a strong market position. You measure your performance in a number of ways, including:

- Turnover (£m's)
- Net Profit
- Market Share
- Number of sales
- Numbers of customers repurchasing (identified through warranty registration cards)



CASE STUDY

Widgets Ltd

- Number of complaints
- Number of warranty claims
- Number of return warranty calls - not fixed first time
- Satisfaction with warranty calls - through reply paid cards left at the time of service

Over the past few years the Company has been really busy. The number of sales and customers repurchasing have both increased in real terms over the past 3 years. However, sales have been below target over the past year and, when viewed as a percentage, the numbers repurchasing have declined. You are not sure whether this is as a result of competitor activity or a lack of loyalty to Widgets Ltd.

Warranty callouts have always created a significant workload leaving little time for proactively exploring customers' needs and expectations and it is recognized that the only source of information at the present time is from the reply paid cards left at the time of a warranty call when the customer has already experienced problems with the Widget.

One of the actions you have taken during the past six months is to analyse your complaints and warranty claims and identify the key causes for complaint. One example is where you identified a problem with paint and have changed the paint process; complaints relating to paint defects have been nearly eliminated. As a result of this approach your complaints and warranty claims have begun to drop, having remained fairly steady over the past 3 years. You will keep a close eye on this to see whether this trend continues and whether this affects repurchasing.

A second common theme appears to be with regard to the appointments system for warranty calls. Customers are asking for greater flexibility with respect to appointments, wanting appointments in the evening and at weekends. You are currently involving your staff in discussions regarding a revised appointments booking procedure and shift system.

You are aware of a number of things that you would like to follow through – for instance you know that you should really explore what the competition are offering but have little time to devote to this as you are always so busy.

However, you would now like to drive some proactive improvements through and like to get a few of your people together to explore the full picture and agree priorities before launching into the first ideas that come to hand. To this end, you have decided to use beta™ and you are about to complete the Processes section of the workbook.



GRADES FOR HOW WE WORK

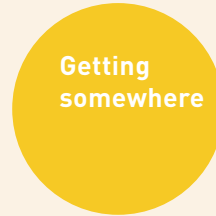
Grades for how we work



Nothing happening
We really haven't even thought about this, or we may have considered it but taken no action as yet



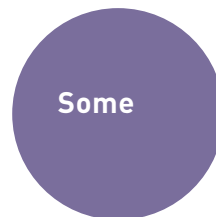
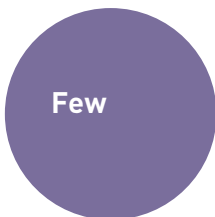
Making a start
We've been thinking and working on this. We've got a few things going, but it's early days. We have some measurements that show we're doing OK.



Getting somewhere
We've got quite a few things going, and we're beginning to see some signs that we're doing things right. According to our measurements, we're improving.

Grades for what we achieve

The what grades are very straightforward. They simply assess the proportion of your results in each section for which the statements are true.



It's working for us

Now we can see things really working. Our activities are working together. We're seeing the results from them – we're steadily improving and meeting a lot of our targets. We're comparing ourselves with other organisations.

It's our normal practice

What we're doing is effective and consistent. We're learning from our experience and we can clearly see the benefits. Our key measurements show consistent improvements over several years. We're meeting our targets and doing well compared with other organisations.

We're seriously sophisticated

We're working at a much more sophisticated level than the statements here would give us credit for. We're consistently doing the right things and we have comprehensive evidence that it's working. We use a wide range of measurements, showing strong improvements over many years. We exceed our targets and can demonstrate that we are best in class in many areas.

Quite a few

Many

Most



MODEL ANSWERS

Widgets Ltd

NOTHING HAPPENING

WE'RE MAKING A START

WE'RE GETTING SOMEWHERE

IT'S WORKING FOR US

IT'S OUR NORMAL PRACTICE

WE'RE SERIOUSLY SOPHISTICATED



What we do

5.1 We produce and deliver products and services that our customers want

0 1 2 3 4 5

In other words:

- We produce or acquire products and services that meet our designs and our customers' needs
- We sell and deliver products and services that we're proud of
- We know what it is about our products and services that gives us competitive advantage, and we make sure that we continue to excel in those areas
- We deliver customer value after the sale by providing the service and support our customers want

WHAT WE DO WELL

- Achieved strong growth and a strong market position
- Provide warranty service support

IDEAS FOR IMPROVEMENT

- We don't find out what else customers might want - only how they find our repair service
- We don't explore what the competition is doing; we don't know what gives us competitive edge

5.2 We build and manage effective relationships with our customers

0 1 2 3 4 5

In other words:

- We build our relationships with our customers by making sure that all their contacts with us are effective and appropriate to their needs
- We use every opportunity to increase our understanding of our customers, to anticipate their needs and expectations
- Our customers' requirements are shared throughout the company so that everyone can play their part in creating customer value and increasing customer satisfaction
- We make ourselves accessible to our customers, and easy to do business with
- We don't make promises to our customers that we can't deliver
- We value feedback from our customers and respond to it rapidly and positively
- We feedback to our customers to let them know what we're doing with their ideas

WHAT WE DO WELL

- We collect feedback from warranty service calls through reply paid cards

IDEAS FOR IMPROVEMENT

- We don't proactively seek feedback except where something has already gone wrong - we need to try harder to understand what influences customer satisfaction

5.3 We manage our processes to increase customer and business value

0 1 2 3 4 5

In other words:

- Our process owners are responsible for the performance of our processes
- All our processes are managed to make sure that we achieve our objectives
- Our processes consistently meet the standards of systems we have chosen to apply, for example ISO 9000 or ISO 14000
- We all know what we need to do and have what we need to make sure our processes work consistently

WHAT WE DO WELL

- We have maintained ISO9000 registration since 1995

IDEAS FOR IMPROVEMENT

- We don't systematically ensure that our processes and procedures link directly to our objectives or help us to add value to the business or our customers



CASE STUDY

Widgets Ltd

NOTHING HAPPENING

WE'RE MAKING A START

WE'RE GETTING SOMEWHERE

IT'S WORKING FOR US

IT'S OUR NORMAL PRACTICE

WE'RE SERIOUSLY SOPHISTICATED



How we plan it

5.4 We design our products and services to meet our customers' needs

- 0
- 1 ✓
- 2
- 3
- 4
- 5

In other words:

- We identify our customers' current and future needs and expectations through market research, customer surveys and other forms of information gathering
- We design our products and services to meet, exceed and anticipate our customers' requirements
- We design our products and services for ease of production and to exploit our advantages in production technology
- We design our products and services to minimise their environmental impact
- We decide how we will check that our products and services continue to meet our customers' needs

WHAT WE DO WELL

- We can demonstrate improvements that are helping us to meet customers' needs eg the appointments system

IDEAS FOR IMPROVEMENT

- We don't proactively seek feedback from all customers – we rely on the reply paid cards when something has already gone wrong.
- We need to better understand why the numbers of people repurchasing widgets has declined
- We have not considered our environmental impact

5.5 We design our processes to achieve our objectives and meet our customers' needs

- 0
- 1 ✓
- 2
- 3
- 4
- 5

In other words:

- We encourage creative ideas from our employees, customers and partners about how we work
- We decide how we are going to manage our processes
- We evaluate systems standards such as ISO9000 and decide whether we will use them to help us manage our processes
- We decide how we will measure the effectiveness of our processes
- We set targets for our process performance

WHAT WE DO WELL

- We can demonstrate improvements e.g. the paint process

IDEAS FOR IMPROVEMENT

- We do not systematically seek ideas from our staff – except on specific projects
- We need to find the time for process improvement and reward and recognise people's good ideas
- We have no process measures



CASE STUDIES

People

NOTHING HAPPENING

WE'RE MAKING A START

WE'RE GETTING SOMEWHERE

IT'S WORKING FOR US

IT'S OUR NORMAL PRACTICE

WE'RE SERIOUSLY SOPHISTICATED



How we check if it's working

5.6 We regularly review our products, services and processes to check that they are working effectively

0 1 2 3 4 5

In other words:

- We follow up on our sales, servicing and other contacts to check what our customers think about our products and services
- We use feedback from our customers to check how satisfied they are with us, for example through surveys
- We measure the performance of our processes, and check that we are meeting our targets
- We check if changes in our processes have had the expected results

WHAT WE DO WELL

- We use reply paid cards to seek feedback
- We use non-conformities to improve our processes
- We know that some of the changes we have made have been successful e.g. paint defects have nearly been eliminated

IDEAS FOR IMPROVEMENT

- We don't proactively review things except where something has already gone wrong
- We could use customer feedback to check where we stand in relation to our competitors



How we apply what we've learned to do things better

5.7 We improve our products, services, customer relationships and processes

0 1 2 3 4 5

In other words:

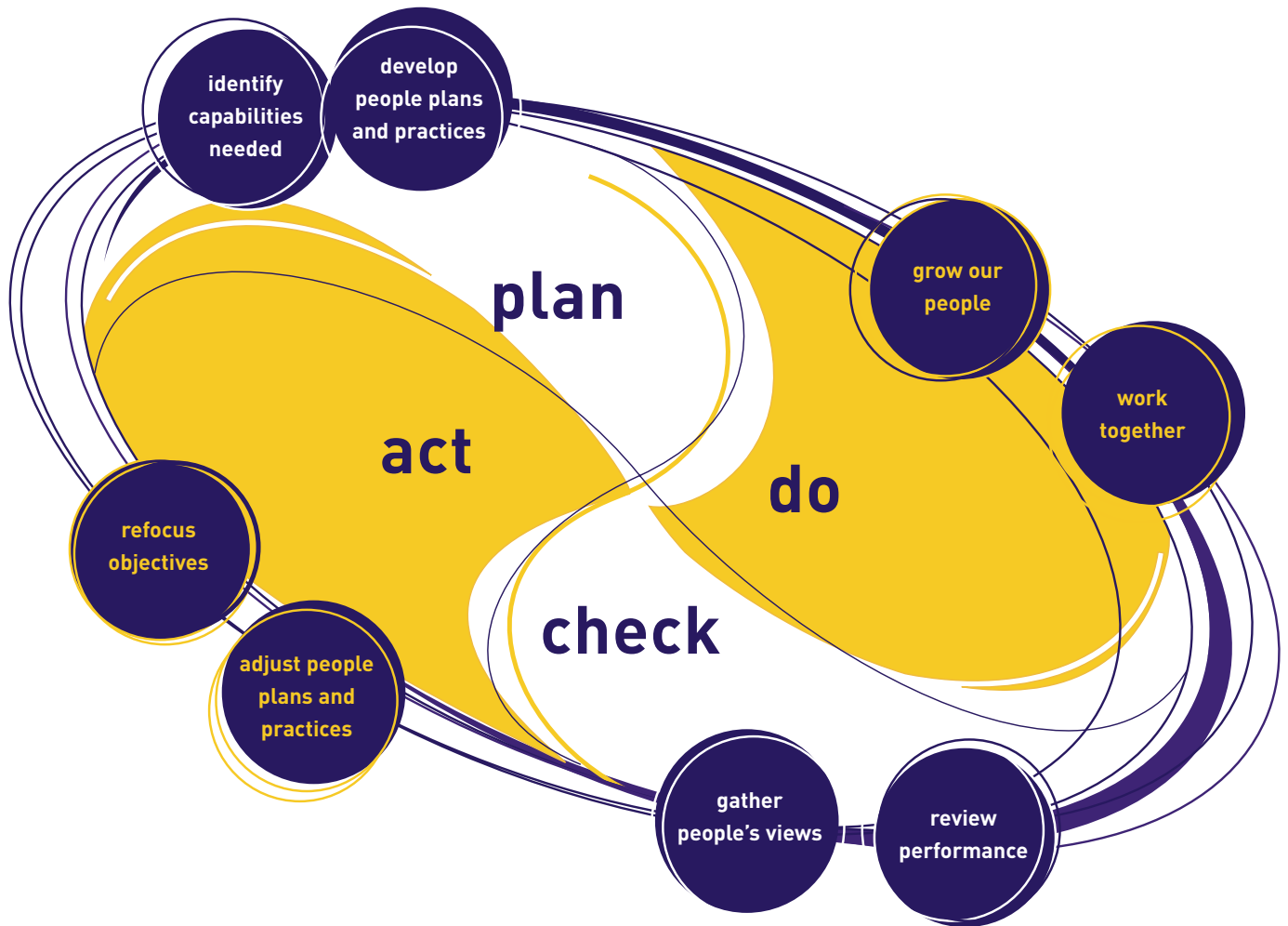
- We use creative and innovative ways to identify improvements
- We use our performance information to help us identify the root cause of problems
- We make improvements to our products, services and ways of working
- We tell everyone who needs to know about changes to our products and services
- We manage process changes, making sure that everyone has the training and support they need

WHAT WE DO WELL

- We can demonstrate a number of improvements

IDEAS FOR IMPROVEMENT

- We could be more innovative in identifying improvements – seek ideas from staff and customers; explore what competitors are offering etc



In this section we consider how we manage our people at an individual, team and business-wide level so that they can achieve what we ask of them, now and in the future.

‘People’ means all people employed by the business including full time, part time, temporary and contract employees and, where appropriate, volunteers.



CASE STUDIES

People

Introduction

This short case study outlines how ABC Ltd approaches some aspects of the management of its people.

Please read this through and use the 'People' section of the workbook to note down ideas about what we (ABC Ltd) do well and ideas for improvement. Please grade the statements.

The company

As a member of the senior management team in ABC Ltd, you are reviewing how you, as a team, manage your business. One aspect you are looking at is how you manage your people.

An employee survey was recently carried out. The following points are based on your own impressions, and on the conclusions you have seen from that survey.

Personal appraisal process

The organisation runs an annual personal appraisal process. The formal annual appraisal is supported by informal one-to-one sessions.

- Most people have had an appraisal in the past year. However, some people have slipped through the net and have not had an appraisal for more than 18 months
- Many people find the appraisals to be useful and some believe that the appraisals have helped them to raise their performance significantly by setting clearer objectives. This is generally reflected in the results their departments achieve. However, some people still believe that their manager views it as being a form filling exercise
- The use of informal one-to-one sessions is patchy

CASE STUDIES

People

Personal development opportunities

People are generally positive about the development and training opportunities offered by the company. Opportunities include formal, external training but also include informal coaching, internal training sessions, secondment opportunities and so on. Secondment opportunities are particularly valued as they help to develop cross-departmental understanding. One area of concern is induction training. The induction package has not been reviewed for some time and it is not always used when people join the organisation.

Communications

The company has a number of communications mechanisms. These include monthly team briefings, e-mail and notice boards, amongst others. Feedback on the effectiveness of these mechanisms is very mixed. There has been no review of the effectiveness of team briefings since they were introduced two years ago and their usefulness is questioned by many. E-mail is a recent innovation and has been well received by many people. It has particularly helped in getting information to field staff quickly through lap tops which they can use to access e-mail from remote sites.

You are using **beta™** to help you develop action plans to improve your performance. You have been asked to complete the workbook before next week's diagnostic workshop.



PEOPLE

NOTHING HAPPENING

WE'RE MAKING A START

WE'RE GETTING SOMEWHERE

IT'S WORKING FOR US

IT'S OUR NORMAL PRACTICE

WE'RE SERIOUSLY SOPHISTICATED



What we do

3.1 We manage and look after our people

0 1 2 3 4 5

In other words:

- We manage recruitment and induction, and redeployment, leaving and retirement
- People don't just perform tasks – they have assigned responsibilities with clear objectives
- We review people's performance with them regularly, give them the support they need to improve their performance and the recognition they earn through their efforts and achievements
- We expect and call for fair treatment of all our employees, we pay them fairly and give them fair terms of employment
- We promote good practice in health and safety, and responsibility towards the community and the environment
- We provide benefits and services that are valued by our people, such as pension plans, company discounts, social activities and travel arrangements
- We know the factors that affect our people's morale, and work to build everyone's job satisfaction

WHAT WE DO WELL

IDEAS FOR IMPROVEMENT

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3.2 We develop our people and empower them to increase their contribution to the business

0 1 2 3 4 5

In other words:

- Everyone has a development plan to grow the skills and abilities we need in the business
- We use the best methods for each development need, for example work experience, coaching in the workplace, networking and external events
- We encourage everyone to make full use of their opportunities to learn and to achieve their potential, supporting the standards we have chosen to apply, such as Investors in People
- People know that their contribution to the business depends on their breadth and depth of knowledge
- We give people, and they accept, decision making authority for their assigned areas of responsibility within the day to day operation of the business
- We give people the information and resources they need and the authority to act

WHAT WE DO WELL

IDEAS FOR IMPROVEMENT

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PEOPLE

NOTHING HAPPENING

WE'RE MAKING A START

WE'RE GETTING SOMEWHERE

IT'S WORKING FOR US

IT'S OUR NORMAL PRACTICE

WE'RE SERIOUSLY SOPHISTICATED

3.3 We work together to find and use smarter ways to work

0 1 2 3 4 5

In other words:

- We encourage people to work together and to be creative
- People get involved in helping the business to improve, by introducing and managing improvements
- We investigate and make use of new management structures and new ways to organise teams
- People enjoy the challenge of being involved in a wide range of areas, with a variety of people and business contexts

WHAT WE DO WELL

IDEAS FOR IMPROVEMENT

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3.4 We talk to each other freely

0 1 2 3 4 5

In other words:

- We communicate top down, bottom up and across the business
- We communicate in the most effective ways, such as discussions, briefings, newsletters, bulletin boards and e-mail
- People are open and honest with each other, and demonstrate high standards of integrity
- We share our information, knowledge and experience freely with each other

WHAT WE DO WELL

IDEAS FOR IMPROVEMENT

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How we plan it

3.5 We develop our people plans and practices

0 1 2 3 4 5

In other words:

- We identify the skills, abilities and people resources we need to achieve the business's overall plans and processes
- We match people's skills and abilities to our present and future business need
- We develop recruitment and training plans to bridge our skills gaps
- We set people's objectives to support the business's objectives
- We identify our communications needs and plan how we will address them
- We involve people in the development of our people plans and practices
- We identify how we'll measure the success of our people plans and practices

WHAT WE DO WELL

IDEAS FOR IMPROVEMENT

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PEOPLE

NOTHING HAPPENING

WE'RE MAKING A START

WE'RE GETTING SOMEWHERE

IT'S WORKING FOR US

IT'S OUR NORMAL PRACTICE

WE'RE SERIOUSLY SOPHISTICATED



How we check if it's working

3.6 We regularly review our people plans and practices to see that they're working effectively

0 1 2 3 4 5

In other words:

- We check our progress against the measurements we identified in our people plans to see how we are performing
- We use feedback from our people to assess how our people plans are working, for example through surveys
- We review everyone's individual objectives regularly and check that they still support our business objectives
- We check how our people plans and practices compare with other organisations
- We check that our communications channels are working
- We check that our plans and practices are working consistently across the business

WHAT WE DO WELL

IDEAS FOR IMPROVEMENT

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How we apply what we've learned to do things better

0 1 2 3 4 5

3.7 We act to improve our performance in managing our people

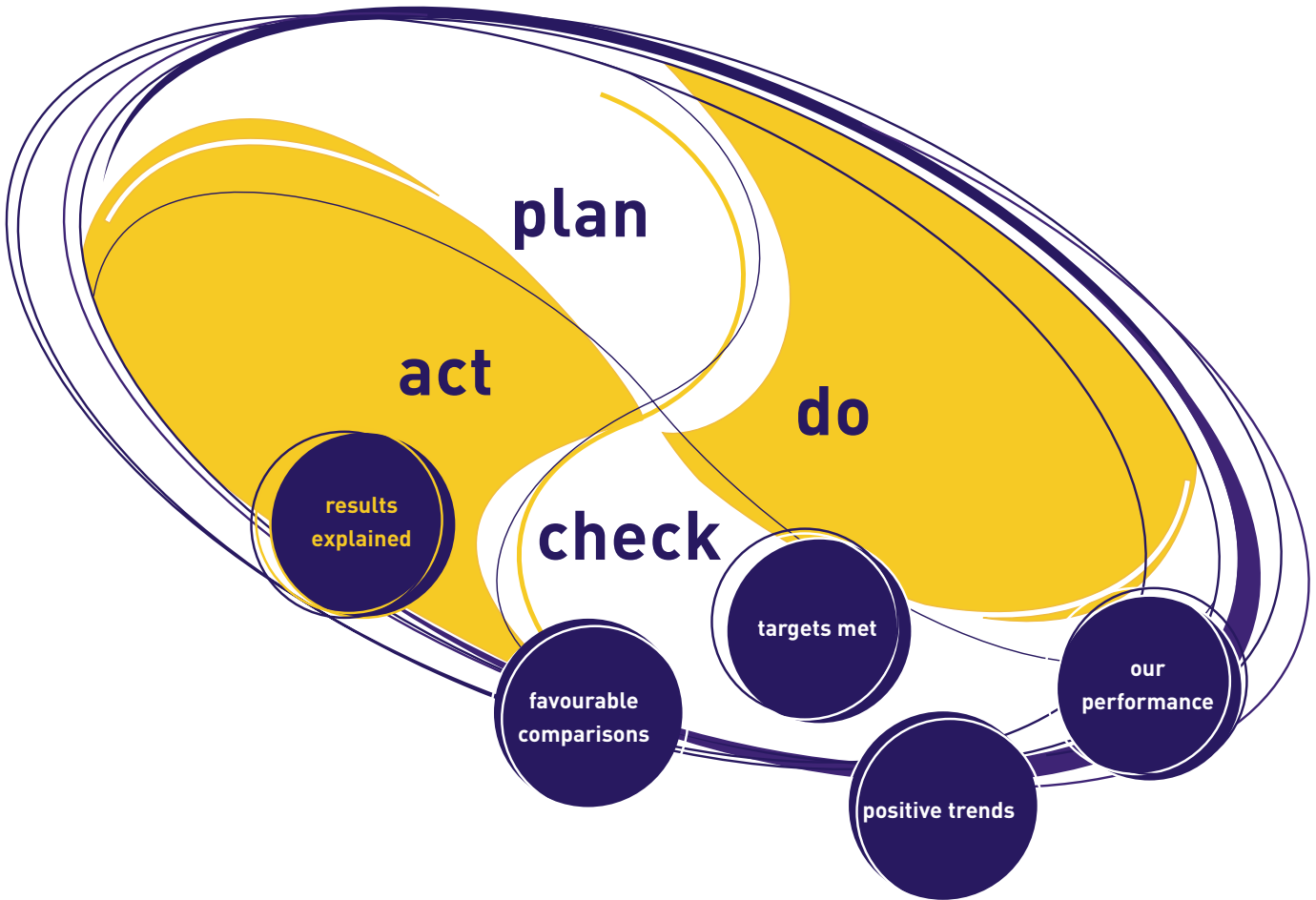
In other words:

- We adapt our plans and practices to take account of changed circumstances
- We update people's objectives so that they continue to support our business objectives
- We discuss with people what we're doing with their feedback
- We encourage everyone to keep supporting the business with energy and enthusiasm

WHAT WE DO WELL

IDEAS FOR IMPROVEMENT

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In this section we consider what we are achieving as a business and in relation to our key stakeholders: our customers; our people; the community in which we operate and our financial backers.

We consider what we are measuring, the trends we are achieving, our performance against our targets and compared with other organisations. We also consider what drives our successes and failures.



CASE STUDIES

Customer Results

Introduction

This short case study outlines how a member of the senior management team of ABC Ltd perceives their customer results.

Please read this through and use the 'Customer Results' section of the workbook to note down ideas about what we (ABC Ltd) do well and ideas for improvement. Please grade the statements.

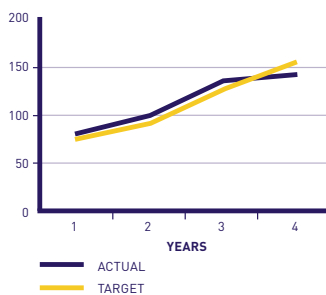
The company

As a member of the senior management team in ABC Ltd, you are reviewing how you, as a team, manage your business. One aspect you are looking at is how the company performs, as measured from your customers' perspective.

ABC Ltd sell and service widgets. You measure your performance in a number of ways:

- number of sales
- numbers of customers repurchasing (identified through warranty registration cards in both real and percentage terms)
- number of complaints
- number of warranty claims
- number of return service calls – not fixed first time
- satisfaction with service calls – through reply paid cards left at the time of service

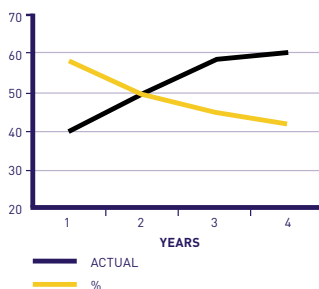
Sales of widgets



The number of sales and customers repurchasing have both increased in real terms over the past 3 years. However, sales have been below target over the past year and, when viewed as a percentage, the numbers repurchasing have declined. You are not sure whether this is as a result of competitor activity or a lack of loyalty to ABC's widgets.

One of the actions you have taken during the past six months to try and explore this is to analyse your complaints and warranty claims and identify the key causes for complaint. One example is where you identified a problem with paint and have changed the preparation of the widget; complaints relating to paint defects have been nearly eliminated. As a result of this approach your complaints and warranty claims have begun to drop, having remained fairly steady over the past 3 years. You will keep a close eye on this to see whether this trend continues and whether this affects repurchasing.

Re-purchases



You are also keeping an eye on the number of return service calls. Over the past year this had begun to rise, having been falling in percentage terms over the past 3 years. You are exploring how to incorporate these measures into the personal appraisal process. You are also concerned that appraisals and one-to-one sessions are not being carried out effectively by some managers and feel that this is having an impact on the performance of some individuals. This would seem to be reflected in the levels of satisfaction recorded in the reply paid satisfaction cards.

You are using **beta™**. You have been asked to complete the workbook before next week's diagnostic workshop.



CUSTOMER RESULTS

WHAT WE ARE ACHIEVING WITH AND FOR OUR CUSTOMERS

NONE FEW SOME QUITE A FEW MANY MOST



What we measure?

6.1 We have a range of measurements to show our customers' perceptions

0 1 2 3 4 5

In other words:

- We measure our customers' perceptions of us, for example through surveys and interviews
- Our results cover all the areas that are important to our customers and to us to check our performance

For example, feedback from our customers on:

- Satisfaction levels
- Product and service quality
- Our image
- Loyalty

WHAT WE DO WELL

- We have reply paid satisfaction cards for service calls

IDEAS FOR IMPROVEMENT

Ask our customers:

- What they think of the product, not just the service
- How they think we compare with others
- About future purchasing plans, and why

6.2 We have a range of internal and other results to show what we are achieving for our customers:

0 1 2 3 4 5

In other words:

- We use internal measurements to understand our performance and predict its impact on our customers
- Our results cover the areas that are important to our customers to check our performance

For example, performance measurements of:

- Levels of complaints
- Levels of service
- After sales response rates
- Defects and error rates
- Business gained and lost
- Customer retention
- Customer accolades

WHAT WE DO WELL

- We measure a range of things: Sales/re-sales, complaints, warranty claims, return service calls

IDEAS FOR IMPROVEMENT

- Check whether we're measuring the things that matter most to our customers



What our results look like over time

6.3 We are achieving positive trends in our performance over three years

0 1 2 3 4 5

In other words:

- Our latest results show that we are performing excellently
- We have results for our key measurements over time
- Our key measurements show positive trends over time

WHAT WE DO WELL

- We have plotted some trends over time
- Sales and purchases increased in real terms over three years
- Complaints and warranty claims beginning to drop
- Percent return service call fallen over the past three years

IDEAS FOR IMPROVEMENT

- Investigate why the percent repurchasing has declined over the past year
- Confirm/identify problem areas with service calls
- Follow through personal appraisal actions to address problems with service calls



CUSTOMER RESULTS

NONE
FEW
SOME
QUITE A FEW
MANY



What our results look like against our targets

6.4 We meet the targets we have set for our key measurements 0 1 2 3 4 5

In other words:

- We have targets for our key measurements that are challenging but achievable
- Our performance on each result compares well with our targeted results over time

WHAT WE DO WELL

- Some targets set

IDEAS FOR IMPROVEMENT

- Find out why we're not meeting sales targets
- Set targets for all our key measurements



What our results look like compared with other organisations

6.5 We check how our performance compares with other organisations 0 1 2 3 4 5

In other words:

- We make comparisons with other organisations
- We are achieving results as good as our competitors over time
- We consistently outperform the organisations which are seen as the best at looking after their customers

WHAT WE DO WELL

IDEAS FOR IMPROVEMENT

- Look at how we can compare our performance with others



Why our performance varies

6.6 We can identify and explain areas of good and poor performance 0 1 2 3 4 5

In other words:

- We have the detailed information to analyse our results and improve our business
- We segment our results, for example to compare the perceptions of different types of customers
- We analyse our results, for example analysing stages of our sales/delivery process

WHAT WE DO WELL

- We analyse some results and take some action as a result
e.g. complaints and warranty claims

IDEAS FOR IMPROVEMENT

- Develop more detailed analysis of all our key measurements so we can find out what's causing any poor results



UK Excellence Federation

Business Excellence Through Action

The action planning phase

Aim

To agree the actions needed to improve the business based on the outcomes from the diagnosis.

Objectives

By the end of this phase, participants will have:

- prioritised and agreed the key areas for action
- agreed who needs to do what and by when
- identified measurable outcomes
- agreed how progress will be monitored

Outline programme

The detailed arrangements will be designed to suit each client's needs. However, the total time spent in the action planning phase should be approximately half a day.

Introductions

Sharing participants' experience of successful and unsuccessful change

Prioritising and agreeing the key areas of action

Agreeing objectives

Developing plans

Agreeing next steps



ACTION PLANNING

Objective To ensure that our appraisals and one-to-one sessions are effective and are consistently used to set objectives and monitor progress; they should make connections between business, team and individual objectives and encourage personal development and teamwork.

Ownership Jim Smith

Key measures Employee survey used to check people's perceptions of the effectiveness of appraisals and one-to-ones. Improvements in key measures of business performance:

- 25% reduction in the number of return service calls by December
- 25% increase in customer satisfaction by December as measured by the reply paid card

Action	Next steps	Resource implications	Timescales	Measurable outcomes	Responsibility
Explore why appraisals and one-to-one sessions are not used consistently	Form task group Identify issues	Staff time	Group to meet by 5th March Strategy presented to senior management by 30th April	Issues clearly defined Strategy developed	Jim Smith
Is it to do with the format of the appraisal forms etc – or the skills and knowledge of managers?	Develop strategy to address them Present strategy to senior management team				
Extend employee survey to explore perceptions of appraisals and one-to-ones in more depth	Find out how other organisations measure this Develop recommendations for our own approach – linking in with the findings of the task group Implement revised survey	Staff time Networking costs	Survey to be carried out in September	Revised survey form Able to assess staff perceptions of appraisal's and one-to-ones more effectively	Joe Mbue