

PROFIT BY SELF-ASSESSMENT

Benchmark and improve your organisation's performance

This is your organisation's opportunity to participate in a comprehensive self-assessment programme that is the first step towards improving your performance. The Benchmarking and Performance Excellence Self-assessment (BPES) will enable your organisation to assess its management systems and performance against world-class performance criteria, and benchmark your organisation's performance against other participating organisations worldwide. Information from this assessment will help you to identify your organisation's strengths and opportunities, and formulate an action plan that can bring significant improvements to your organisation's performance and financial results.

The **BPES** was designed by the Centre for Organisational Excellence Research (COER) after an in-depth review of over 30 Baldrige Model and European Business Excellence Model self-assessments. Consequently, it provides one of the most resource effective types of business assessment there is. The BPES process requires an investment of only 25 to 80 man hours of your organisation's time (dependent on your approach) and at a cost that is affordable.

The **BPES** offers you the option of having your assessment against either the Baldrige Criteria for Performance Excellence (used in the States and many other countries such as New Zealand) or the EFQM Business Excellence Model (used throughout Europe and other countries such as the UAE). Both of these models are similar and reflect the successful management practices of high performing companies. The BPES has also been translated into Chinese and Arabic by COER's partners – for information on the translated options contact COER.

So how do you get started on self-assessment?

All you need is a self-assessment pack – this contains instructions, a facilitator's guide, team member's guide, questionnaire, scorecards and consensus spreadsheet. Essentially, the self-assessment requires you to form a team and then reach a consensus of opinion on your organisation's performance for approximately 100 questions. Questions are asked on either the seven areas of the Baldrige Criteria for Performance Excellence: leadership; strategic planning; customer and market focus; measurement, analysis and knowledge management; human resources; process management; and business results or the nine criteria of the EFQM Model: leadership; policy and strategy; people; partnerships and resources; processes; customer results; people results; society results and key performance results.

The results of your self-assessment are then processed by COER, who analyse and provide you with a confidential feedback report, identifying your organisation's rating:

- ❖ against each of the EFQM or Baldrige categories and sub categories of the Criteria
- ❖ in comparison with the average and highest performers that have also undertaken the assessment (over 300 assessments have been completed against BPES)

One example of one of the many feedback graphs is shown below:

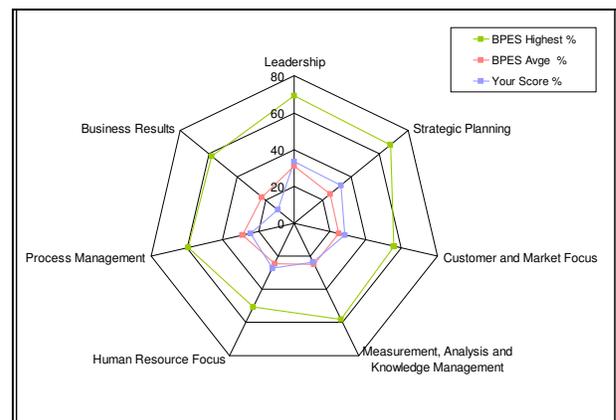


Fig – Your organisation's performance compared to BPES average and highest scores.

The feedback report also provides a best practice action planning process that helps to ensure that your organisation prioritises those actions that will have the greatest impact on improving overall organisational performance.

As your organisation's name will be coded, you can be sure that no other organisation will know of your results. COER assures **total confidentiality** of your information.

Frequently asked questions

Which versions of the Business Excellence Criteria are used? – The latest version. BPES is regularly adjusted to ensure compatibility with the latest Criteria.

Is this type of assessment applicable to organisations of any size? – Yes. However, you will probably gain more from the assessment if your organisation has more than 5 employees – there is no upper limit on size.

If we have a number of operational units, should they undertake separate self-assessments? – Units that are financially autonomous and have full operational responsibility should undertake separate self-assessments.

Are there any hidden costs? Do we need to use external consultants to facilitate the self-assessment process? No, there are no hidden costs. The self-assessment has been designed as a stand-alone service and does not require the input of consultants. However, some organisations prefer to use consultants to familiarise their people with the self-assessment process and facilitate the Consensus meeting and/or the Action Planning Meeting. If this is your preference, COER can help you here.

Is the self-assessment as good as the one used for assessing organisations for National Awards? – Assessments for National Awards use the same Criteria but base their assessment on a 50 or 75 page written application that is written by the applicant and assessed by a team of external evaluators. The **BPES** is less rigorous but will give your organisation an accurate appreciation of its main strengths and areas for improvement and provide feedback on your organisation's performance relative to that of other organisations. It will also give your employees a greater understanding of business excellence should you wish to undertake a more rigorous third-party assessment at a later date.

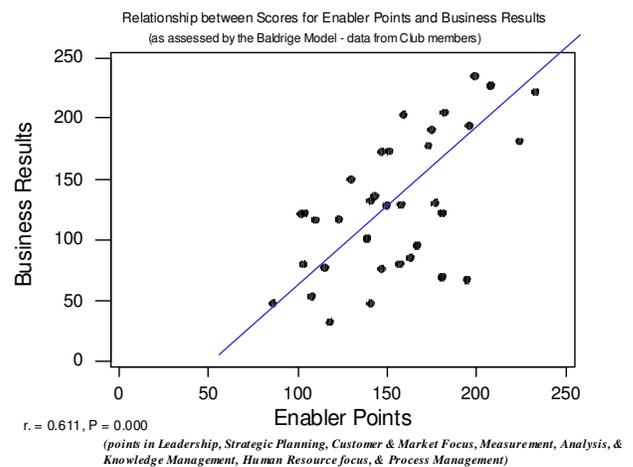
How often should we repeat the self-assessment? - Once a year. Often, organisations undertake a more rigorous awards-style assessment every two to three years and use assessments such as **BPES** in between to provide feedback in a short space of time as it requires less resource. Organisations should undertake **BPES** even in years when they undertake an award-style assessment as they can

obtain significant value from integrating the benchmarking feedback into their strategic planning process.

How do I obtain commitment within our organisation to undertake a self-assessment? – The design of the BPES aims to overcome any commitment problems as it is an inexpensive assessment to undertake in terms of time and cost. Also, as the **BPES** instructions and questionnaire are easy to understand, the process of actually undertaking the self-assessment will educate your organisation on business excellence and obtain further buy-in to the whole process.

The Figure below may help in obtaining initial commitment. This graph shows the spread of business excellence scores of organisations that assessed themselves using the **BPES** in 2007. This graph indicates that if organisations improve their management systems (as assessed by Business Excellence Criteria) their financial and market results will improve. Statistically this relationship is significant and the correlation is “strong”.

Business Excellence Pays



To order

Download an order form from www.coer.org.nz or contact Dr Robin Mann, COER at r.s.mann@massey.ac.nz.

Further information on BPES can be found at www.businessexcellencetools.com