

M A R L B O R O U G H

CHAM **b** ER OF COMMERCE

B u s i n e s s V i t a l i t y

Marlborough Chamber of Commerce

Business Excellence Programme

2009

Mini Self Assessment



Introduction

Welcome to the initial level of the Marlborough Business Excellence Programme for 2009 - a programme of excellence for all of the business community to engage in. The Marlborough Business Excellence Programme is a programme of achievement and development in business excellence and is in alignment with an internationally recognised business excellence framework.

By requesting this Mini Self Assessment you have become a participant of the programme and you have the choice to progress through the levels within the entire programme at a pace that best suits you and your business in alignment with the criteria eligibility set for each level.

Becoming a participant gives you access to:

- This Mini Self Assessment
- The Full Self Assessment
- Attendance at all four workshops dedicated to implementing Business Excellence within your business and supporting the completion of the Entry Form
- The entry Form to move through the evaluation process
- First options to purchase tickets for the Business Excellence Awards Gala Dinner to be held in November

This programme is for you and your business - regardless of whether you are a sole operator in your first year of business, a managing director of a highly experienced and successful business, or an owner of a business that fits somewhere in between.

It is a programme for all businesses that:

- have an interest in doing business better
- want to finding out where they are within a specified and proven benchmark system
- want more profits
- want less stress
- want to working smarter and not harder
- want to take advantage of the opportunities that exist in today's and tomorrow's economy

Knowing where you are today, helps greatly to position yourself to where you want to be tomorrow. Completing this Mini Self Assessment is effectively taking a snapshot of where your business is currently at, and helping you to develop a better awareness of where and what to focus on from a business excellence perspective for the future.

Suggestions for Completing this Mini Self Assessment

- Set aside up to 2 hours to complete. Preferably when you won't be disturbed and no other matters are immediately pressing. Make sure you are comfortable as well - this is an exercise in working on your business not in it!
- Don't hurry through the assessment to fit within a 2 hour timeframe. If it takes longer for you to complete that's okay, this is not a speed test and if this is the first time you have completed an assessment of this nature on your business it may take a little longer, especially when you start to rationalise your responses.
- Be honest with yourself about your business. No one will see this assessment unless you want to share it with others. This is not about judging yourself or your business, nor about being more upbeat about what is happening in your business than what is actually happening right now. Either way neither is beneficial when completing this assessment and you moving ahead and bettering your business.
- Have a dedicated notebook or folder to record any ideas and options that come up while completing this assessment – some may be the perfect place for you start with any actions you decide to follow through with after completing this assessment.

There are three sections to complete that focus on the 7 key areas that are aligned to the business Excellence criteria. Each section has its own instructions and each section follows on from the previous one so start at Section 1 and work your way through.

The final part of the assessment guides you through what to do when you have completed this assessment.

Section 1

Your Initial Self Assessment

Leadership

The leaders are the people in your business responsible for guiding and managing the business.

Consider each sentence in the following statement and then determine which overall response is the most accurate and honest assessment of how your business currently performs in this area. (Circle the letter of your response)

'Our leaders set clear direction and communicate this effectively. Our leadership is visible, demonstrates our stated values, and models the behaviour expected of employees. Our leadership encourages two way communication, inspires and motivates. Our leadership balances the interests of customers, employees and shareholders alike, and we are actively developing future leaders. Compliance, public and social responsibility is evident throughout all aspects of our leadership activities.'

A	Yes – this definitely sounds like us. We are aware of all the above and demonstrate this most of the time.	B	Yes – this sounds a lot like us. Some of these things are demonstrated and we are aware of the ones that are not.
C	Yes – this sounds a bit like us. We demonstrate some of these things but only from time to time.	D	No – this does not sound like us. Right now we don't really demonstrate any of this.

Now delve a bit deeper and in the space below write 2-3 sentences in support of your chosen response. This can be a rationalisation of your response and/or outline evidence or some examples of what you are doing currently. From this, if you sense your initial response needs changing – adjust it accordingly. If your reflection is reinforcing your initial response – that's fine too.

Strategic Planning

Strategy the process by which the future direction of the business is determined. Planning involves determining the actions, responsibilities and resources that will ensure the business achieves short and long term strategies.

Consider each sentence in the following statement and then determine which overall response is the most accurate and honest assessment of how your business currently performs in this area. (Circle the letter of your response)

'We have a process for setting strategy and planning the future of our business. Our process involves input from all staff at some level and our plan sets clear goals, actions and responsibilities. We document our decisions and our results are tracked and reviewed on a regular basis. We ensure our plan encompasses both short and long term objectives.'

A	Yes – this definitely sounds like us. We are aware of all the above and demonstrate this most of the time.	B	Yes – this sounds a lot like us. Some of these things are demonstrated and we are aware of the ones that are not.
C	Yes – this sounds a bit like us. We demonstrate some of these things but only from time to time.	D	No – this does not sound like us. Right now we don't really demonstrate any of this.

Now delve a bit deeper and in the space below write 2-3 sentences in support of your chosen response. This can be a rationalisation of your response and/or outline evidence or some examples of what you are doing currently. From this, if you sense your initial response needs changing – adjust it accordingly. If your reflection is reinforcing your initial response – that's fine too.

Customer & Market Focus

Customer and market focus considers how you determine your customer and market requirements, expectations and preferences. It also identifies how you build your relationships, monitor satisfaction/results and develop future opportunities.

Consider each sentence in the following statement and then determine which overall response is the most accurate and honest assessment of how your business currently performs in this area. (Circle the letter of your response)

'We actively and continually collect information to determine our customer and market requirements. We use our information to action improvements, monitor customer perception and develop new opportunities. We have processes in place to communicate with our customers effectively, build customer loyalty and enhance customer satisfaction.'

A	Yes – this definitely sounds like us. We are aware of all the above and demonstrate this most of the time.	B	Yes – this sounds a lot like us. Some of these things are demonstrated and we are aware of the ones that are not.
C	Yes – this sounds a bit like us. We demonstrate some of these things but only from time to time.	D	No – this does not sound like us. Right now we don't really demonstrate any of this.

Now delve a bit deeper and in the space below write 2-3 sentences in support of your chosen response. This can be a rationalisation of your response and/or outline evidence or some examples of what you are doing currently. From this, if you sense your initial response needs changing – adjust it accordingly. If your reflection is reinforcing your initial response – that's fine too.

Information and Analysis

This is the foundation of a performance oriented organisation. It involves having a fact based measuring system using data and information (knowledge) to support key business activities, make decisions based on fact, as well as analyse the performance of the organisation.

Consider each sentence in the following statement and then determine which overall response is the most accurate and honest assessment of how your business currently performs in this area. (Circle the letter of your response)

'We actively collect and analyse the right information to determine our overall performance. We have a process in place to ensure the accuracy, reliability and security of our information. Our information can be benchmarked against comparative data and is actively used by our leaders in our strategic planning process. We have methods in place to distribute our information as required within our organisation.'

A	Yes – this definitely sounds like us. We are aware of all the above and demonstrate this most of the time.	B	Yes – this sounds a lot like us. Some of these things are demonstrated and we are aware of the ones that are not.
C	Yes – this sounds a bit like us. We demonstrate some of these things but only from time to time.	D	No – this does not sound like us. Right now we don't really demonstrate any of this.

Now delve a bit deeper and in the space below write 2-3 sentences in support of your chosen response. This can be a rationalisation of your response and/or outline evidence or some examples of what you are doing currently. From this, if you sense your initial response needs changing – adjust it accordingly. If your reflection is reinforcing your initial response – that's fine too.

Workforce

Excellent businesses encourage their people to develop and use their full potential while contributing to the achievement of the business' short and long term goals. This includes building a work environment that encourages performance excellence and full participation, as well as personal and organisational growth.

Consider each sentence in the following statement and then determine which overall response is the most accurate and honest assessment of how your business currently performs in this area. (Circle the letter of your response)

'Our work and job descriptions encourage employee cooperation, empowerment and innovation. Our employees are motivated and we encourage skill development and ongoing education. We have reward and recognition practices in place which reinforce high performance and achievement. Our succession planning monitors our employees progress to identify future managers and leaders.'

A	Yes – this definitely sounds like us. We are aware of all the above and demonstrate this most of the time.	B	Yes – this sounds a lot like us. Some of these things are demonstrated and we are aware of the ones that are not.
C	Yes – this sounds a bit like us. We demonstrate some of these things but only from time to time.	D	No – this does not sound like us. Right now we don't really demonstrate any of this.

Now delve a bit deeper and in the space below write 2-3 sentences in support of your chosen response. This can be a rationalisation of your response and/or outline evidence or some examples of what you are doing currently. From this, if you sense your initial response needs changing – adjust it accordingly. If your reflection is reinforcing your initial response – that's fine too.

Processes

Processes are the way things are done to carry out the business. This includes both product and/or service processes, as well as their accompanying Support processes. All processes are designed with the customer in mind, are aligned with strategy, and are monitored and continuously improved.

Consider each sentence in the following statement and then determine which overall response is the most accurate and honest assessment of how your business currently performs in this area. (Circle the letter of your response)

'Our key processes are known and understood across the organisation. Our key product/service processes are tailored to meet our customer requirements. Our key support processes are reviewed and monitored with improvements implemented when identified. We have clear performance expectations with our partners and suppliers. We monitor our business and financial risk and have a robust business continuity plan for any emergency.'

A	Yes – this definitely sounds like us. We are aware of all the above and demonstrate this most of the time.	B	Yes – this sounds a lot like us. Some of these things are demonstrated and we are aware of the ones that are not.
C	Yes – this sounds a bit like us. We demonstrate some of these things but only from time to time.	D	No – this does not sound like us. Right now we don't really demonstrate any of this.

Now delve a bit deeper and in the space below write 2-3 sentences in support of your chosen response. This can be a rationalisation of your response and/or outline evidence or some examples of what you are doing currently. From this, if you sense your initial response needs changing – adjust it accordingly. If your reflection is reinforcing your initial response – that's fine too.

Results and Outcomes

The results and outcomes from any business activities are the outputs. What goes into a business is effectively measured by what shows up in results and outcomes. They can be measured via performance achieved and improvements made, and rate highly when it comes to the excellence in overall performance that a business has actually achieved.

Six statements follow that describe the key areas of any business or organisation in regard to Results and Outcomes. Consider each statement individually, and then determine which overall response is the most accurate and honest assessment of how your business currently performs in this area. (Refer to the responses below and write your response along side the statement)

Statement	Your Response
<ol style="list-style-type: none"> 1. Our <u>Product and Service</u> performance and improvements are measured through our results achieved against set targets, through our results relative to our competition, and against trends and other key measures. 2. Our <u>Customer Focused</u> performance and improvements are measured through our customer satisfaction feedback, through our customers loyalty and the number of positive referrals given, and against our results relative to our competition. 3. Our <u>Financial and Market</u> performance and improvements are measured through our financial and economic performance, through our financial return and economic value, our market share and strategic position, and through our business growth and new market expansion. 4. Our <u>Workforce</u> performance and improvements are measured through the level of our employee satisfaction, through key measures of our employee learning and development, and through key measures of our overall workforce effectiveness. 5. Our <u>Organisational Effectiveness</u> performance and improvements are measured through our overall productivity and financial return to stakeholders, through our development of supplier and partner relationships, and against trends and other key measures. 6. Our <u>Governance and Social Responsibility</u> performance and improvements are measured through our strategic plan and through our performance relative to industry regulatory and legal compliance, and through our environmental, ethical and fiscal accountability. 	

A	Yes – we definitely measure performance and improvements in this area and do so at significant depth and in detail.	B	Yes – we do measure performance and improvements in most of these areas and in most cases with some depth and detail.
C	Yes – we do measure performance and improvements in some of these areas and with a little but of depth and detail in some cases.	D	No – we are not really measuring much here at all. In fact in some parts this is pretty much non-existent.

Section 2

Self Assessment Outcome

You have now completed Section 1 of the Mini Self Assessment and affirmed your understanding of where you honestly see your business today, and your current level of performance. To progress through Section 2, now complete the following 2 steps.

Step 1

Review your comments and overall responses to the first six statements, and then grade your rationale using the reference table below. (Tick the most appropriate box)

Business Inputs

Leadership

Strategic Planning

Customer and Market Focus

Information and Analysis

Workforce

Processes

	0	2	4	6
Leadership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer and Market Focus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information and Analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workforce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Grading and descriptions

6	We can show strong evidence of this being our practice. There is also ongoing evaluation and improvements activity in this area.
4	Practice of this is well underway and there is also some clear evidence of its implementation.
2	We can show we have made a start. Yes- we do it, but it is nothing to shout about. It works, but could be a lot better.
0	We can't show any evidence of this happening. Instead we rely on anecdotal information and we would not want an external consultant to review this.

Step 2

Review your responses for each of the statements under the Results and Outcomes heading in Section 1 by completing the following sentences.

1. Product and Service

Our Performance here is....

Our Improvements here are....

2. Customer Focus

Our Performance here is....

Our Improvements here are....

3. Financial and Market

Our Performance here is....

Our Improvements here are....

4. Workforce

Our Performance here is....

Our Improvements here are....

5. Organisational Effectiveness

Our Performance here is....

Our Improvements here are....

6. Governance and Social Responsibility

Our Performance here is....

Our Improvements here are....

Now grade your rationale using the reference table below. (Tick the most appropriate box)

Results and Outcomes

- 1. Product and Service
- 2. Customer Focus
- 3. Financial and Market
- 4. Workforce
- 5. Organisational Effectiveness
- 6. Governance and Social Responsibility

	0	2	4	6
1. Product and Service				
2. Customer Focus				
3. Financial and Market				
4. Workforce				
5. Organisational Effectiveness				
6. Governance and Social Responsibility				

Grading and descriptions

6	Improvements and good performance levels feature in most if not all areas with trends showing areas of strengths and good relative performance levels (ie through benchmarking). There are good (or better than good) business results occurring.
4	Improvements and good performance levels feature in some areas of importance. Some results are being reported in some areas but not all areas.
2	Some performance levels and improvements are being measured in a few areas. Results are generally still not reported in most areas.
0	No results or poor results are being reported and improvements really don't feature.

Your Grading

There is a difference between a business that is good or doing great, and a business that is performing to the standards set by the New Zealand Business Excellence Foundation. The Marlborough Chamber of Commerce Business Excellence Programme is aligned to the New Zealand Business Excellence Foundation, standards, benchmarks and framework.

The following is a very general and simplified outline of your grade against this framework. By completing this mini self assessment, you now have a general grade and you also have information to work with should you wish to do so.



Scores mostly in the White and/or Lighter Grey Zones

Your assessment reveals a business that is at the beginnings of a journey of business excellence or a business that is very new. There is lots of opportunity here for you to take on board the business excellence framework to support and expand your business' performance.



Scores mostly in the Lighter Grey Zones

Your assessment reveals that in some areas your journey of business excellence has definitely started. There are areas where your business is living a culture of business excellence to some degree and lots of opportunity to build a stronger presence of business excellence into other areas of your business.



Scores mostly in the Darker Grey Zones

Your assessment reveals that in some areas, if not all, your journey of business excellence has well and truly started. You now have a real opportunity for further development and to realise your full potential in line with the Business Excellence framework.

So what now with this assessment?

Now that you have completed the Mini Self Assessment please propose the following question to yourself.

'Do I want to delve deeper, find out in more detail and have a fuller understanding of where my business is in relation to a set business excellence benchmark?'

If you answer - Yes

Request the Full Self Assessment from the Marlborough Chamber of Commerce. This assessment breaks down the 7 keys areas further so you can identify exactly where within each area you are aligned to the business excellence benchmark and where any gaps are.

If you answer - No

Advise the Marlborough Chamber of Commerce of your decision not to proceed further with the Full Self Assessment.

What happens now?

You have some choices to make regardless of whether you proceed with completing the Full Self Assessment or not. But first - congratulations on committing to and completing this first level in the Business Excellence Programme.

Take a moment now to congratulate yourself and acknowledge what you have just completed and achieved. By committing this time to reflecting on your business from these 7 key aspects, you now have an up to the minute, honest brief self assessment of where your business currently is in alignment with a designated nationally and internationally recognised business excellence framework.

Depending on how you graded your business in these 7 areas you now have a couple of options to choose from.

A. Take no further action.

OR

B. Make the commitment to take some appropriate action for your business to progress on its own journey of business excellence through:

- Going to the next level of the 2009 Business Excellence Programme and completing the Full Self Assessment, and/or
- Undertaking some other form of business excellence activity outside of the 2009 Business Excellence Programme.

To help in your commitment to take action, please consider the following as part of your immediate action plan.

A. Contact the Marlborough Chamber of Commerce:

- To get a copy of the Business Excellence Programme Full Self Assessment.
- To register for the Business Excellence workshops in June & July.
- To find out what other options are available to you for building a better business through information and training events and other options.

B. Schedule time in your diary now:

- To complete the Full Self Assessment. It will take up to one full day (approximately 8 hrs) to complete and depends on how detailed your action plans are, resulting from this assessment.
- To attend the Business Excellence workshops. These are an integral part of the process and available to you free of charge, even if you do not complete the Full Self Assessment.
- To take action on any notes you made throughout this Mini Self Assessment. Some possible questions to include in your reflection of completing this Mini Self Assessment are:
 - What I do want to do about the information I now have about my business?
 - What do I want to do about filling any gaps in these 7 areas of my business to progress from where it is currently at, to where I'd like it to be in the future – say in 6 months?
 - How much time do I want to invest in this process?

The Marlborough Chamber of Commerce acknowledges and thanks the following confirmed sponsors for their support of the 2009 Business Excellence Awards Programme.



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