

**Dr Robin Mann**

Founder & Head, COER, Massey University  
Chairman, Global Benchmarking Network



**TRADE**

**Certification Workshop on  
Benchmarking for Excellence Methodology**

← for best practices ←



**BestPrax Club**

The benchmarking centre for best practices



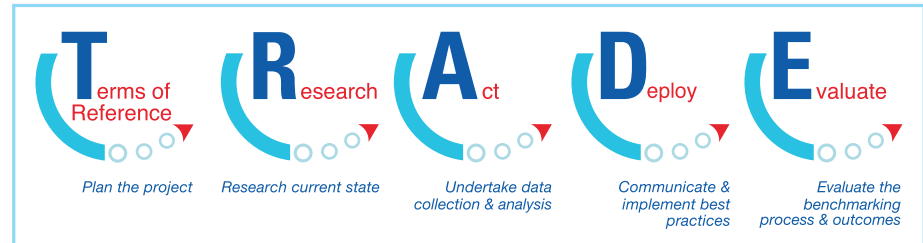
“A 2008 global survey of 500 organisations of all sizes and sectors conducted by the Global Benchmarking Network, revealed that Informal Benchmarking was one of the most popular quality techniques used by 69% of organizations. Best Practice Benchmarking, used by 39%, delivered the most benefit with projects achieving returns of over \$250,000.”

Given today's environment, there's simply less margin for error. Questions proliferate from organisations:

- Why do we still get many customer complaints?
- How do we deliver better service without vastly increasing operational cost?
- How do we further improve product or service quality?
- How do we retain talent?
- How do we build a corporate learning culture?

Benchmarking focuses on how to improve any given business process by exploiting “best practices” rather than merely measuring the best performance. Being reflected in various Business Excellence award criteria more extensively than any other management concepts, Benchmarking also promotes the emergence and evolution of a “learning culture” throughout the organisation, a key to continuous improvement, total quality and competitiveness over the long term.

## Certified Benchmarking Training - Level 1



COER's proprietary TRADE Benchmarking methodology was developed by Dr. Mann, and adopted by organisations in a number of countries including New Zealand, Taiwan, UAE and the UK.

The two-day intensive platform is for individuals or teams that want to accelerate their benchmarking learning and kick-start projects that will deliver innovative solutions and best practices. This platform is also the only route to certification in benchmarking and training by Dr Mann - to provide assurance that your benchmarking projects are being conducted in a professional and effective manner.

**Successful participants will be awarded the TRADE Benchmarking Trained Certificate (Bronze) by COER upon completion of the program which leads ultimately to the Trade Benchmarking Mastery Certificate (Gold).**



## Why TRADE?

The TRADE methodology offers these advantages:

- ♦ It offers a proven approach. It is endorsed by the Global Benchmarking Network and has been used by private and public sector organisations of all sizes (for example, it is the approved methodology for Singapore's Public Service and is actively promoted and used in countries such as NZ, Taiwan, the UAE, and the UK).
- ♦ It is flexible and can be used for exploratory (1-12 week) or in-depth (13-36 week) projects.
- ♦ It is easy to explain and communicate, as it only consists of 5 stages and has a memorable name!
- ♦ It provides a step-by-step approach. Within the 5 stages, there are simple steps to be followed.
- ♦ It provides a rigorous approach to planning, which ensures that the project will only proceed after a cost/benefit analysis has been undertaken.
- ♦ There is a strong likelihood of success, as projects are supported through a TRADE project management spreadsheet, a TRADE training manual (consisting of a comprehensive set of benchmarking resources and template forms), and a benchmarking certification scheme.
- ♦ It saves time and money. Fifteen years' of benchmarking experience, working with hundreds of organisations, has been invested into the development and refinement of TRADE materials and template forms. TRADE licence holders will have full access to these (and future updates), and so will not need to develop their own materials at considerable expense.
- ♦ It delivers results. After each stage of TRADE, the project is reviewed to ensure it is on-track. If it is not on-track, the project can be stopped or the direction of the project changed. Therefore, all projects should deliver the expected results and major benefits (potentially saving or generating millions of dollars for large projects).

## Who Should Attend?

COOs, Directors, Vice President, General Managers, Senior Managers, Managers and Specialists of:

- ♦ Corporate Development / Planning
- ♦ Quality
- ♦ Strategic Planning
- ♦ Business Excellence
- ♦ Organisation Planning

## Certification

Individuals trained in TRADE can advance their knowledge of benchmarking through the accompanying certification scheme - to ensure that benchmarking is applied professionally.

**This certification scheme is the first to be offered in benchmarking, and recognises the need to advance the professionalism of this field.**

Batch Size: 20

## In-House Professional Fee

\$10,000 (net of local taxes)

Out-of-Pocket Expenses, at actuals, for air travel from and to New Zealand, surface transport, hotel, meals, applicable taxes, etc.

# Agenda

## Day 1

### 1. Purpose of Training

- ◆ Expected outcomes

### 2. Introduction to Benchmarking

- ◆ What is Benchmarking?
- ◆ Types of benchmarking
- ◆ Relationship of benchmarking with business excellence
- ◆ The case for benchmarking

### 3. Benchmarking maturity – from awareness to experts

- ◆ EXERCISE: To assess current benchmarking maturity

### 4. Overview of the Benchmarking Process (TRADE)

- ◆ Terms of Reference (plan the project)
- ◆ Research (research current state)
- ◆ Act (undertake data collection & analysis)
- ◆ Deploy (communicate & implement best practices)
- ◆ Evaluate (evaluate the benchmarking process & outcomes)

### 5. Terms of Reference (plan the project)

- ◆ Introduction
- ◆ Determine area of focus for benchmarking project
- ◆ Develop project brief
- ◆ Form project team
- ◆ Train project team

## Day 2

- ◆ Understand benchmarking code of conduct
- ◆ Prepare Terms of Reference
- ◆ Develop documentation system
- ◆ Review Terms of Reference process
- ◆ Obtain approval to start the next stage of TRADE
- ◆ EXERCISE: TRADE – Develop Terms of Reference

### 6. Research (research current state)

- ◆ Introduction
- ◆ Understand area of focus to be benchmarked
- ◆ Define performance measures
- ◆ Identify current performance
- ◆ Review Research process
- ◆ Obtain approval to start the next stage of TRADE
- ◆ EXERCISE: TRADE – Research

### Presentation on BPIR.com – Benchmarking and Best Practice Website resource

### 7. Act (undertake data collection & analysis)

- ◆ Introduction
- ◆ Establish criteria for selecting benchmarking partners
- ◆ Select potential benchmarking partners
- ◆ Invite and acquire benchmarking

- ◆ partners
- ◆ Prepare for data collection
- ◆ Collect and store data
- ◆ Analyse data
- ◆ Formulate recommendations
- ◆ Review Act process
- ◆ Obtain approval to start the next stage of TRADE
- ◆ EXERCISE: TRADE – Act

### 8. Deploy (communicate & implement best practices)

- ◆ Introduction
- ◆ Communicate findings
- ◆ Develop action plan
- ◆ Obtain approval for action plan
- ◆ Implement actions
- ◆ Review deploy process
- ◆ Obtain approval to start the next stage of TRADE

### 9. Evaluate (evaluate the benchmarking process & outcomes)

- ◆ Introduction
- ◆ Perform cost /benefit analysis
- ◆ Review TRADE process
- ◆ Share experiences and project outcomes
- ◆ Close project

### Issue of Certificates

### Close

## Preparation Work Prior to the Workshop

**It is preferable that participants identify a benchmarking area of focus (a process, activity, or level of performance which needs to be improved) prior to the workshop.** At the workshop participants will develop a Terms of Reference for the benchmarking area of focus, plan the project and begin undertaking the benchmarking steps. On completion of the training participants will understand what is required to complete the project.

The area of focus should be selected for one or more of the following reasons:

- ♦ it is of major strategic importance
- ♦ there is pressure from customers or other stakeholders to improve performance in this area
- ♦ there is evidence that performance can be significantly improved
- ♦ improving performance will result in significant benefits.

Please think of areas of your organisation to improve before the workshop

### Examples of areas of focus:

- ♦ Leadership and governance e.g. Best practices in leadership
- ♦ Customer complaint management e.g. To improve our customer complaint management process to a world-class standard.
- ♦ Balanced Scorecard e.g. To identify and implement best practices in the application of the Balanced Scorecard
- ♦ Supplier relationship process e.g. To become an industry leader for our supplier relationship process.
- ♦ Team culture e.g. To develop a winning team culture
- ♦ Recruitment time e.g. To reduce the time to recruit new staff

## Dr Robin Mann

Dr Robin Mann is:

- ♦ Founder and Head of the Centre for Organisational Excellence Research Massey University. COER undertakes research projects into business excellence and benchmarking. It administers a number of doctorate programmes. [www.coer.org.nz](http://www.coer.org.nz)
- ♦ CEO of the Centre for Organisational Excellence Research Limited. COER Ltd undertakes consultancy projects in business excellence and benchmarking, and provides benchmarking training. [www.coer.org.nz](http://www.coer.org.nz)
- ♦ Commercial Director and Founder of BPIR.com Ltd. BPIR.com is a leading Internet resource for sharing best practice and benchmarking information. It has more than 6,000 members worldwide. [www.bpir.com](http://www.bpir.com).
- ♦ Chairman of the Global Benchmarking Network. The Global Benchmarking Network is a membership-based organisation for those organisations that promote and support benchmarking within their country. Currently more than 20 countries are represented. [www.globalbenchmarking.org](http://www.globalbenchmarking.org).
- ♦ Advisory Board member at the Hamden Bin Mohammed e-University, Dubai [www.hbmeu.ae](http://www.hbmeu.ae). The e-University aims to become the leading e-educator in the Arab world through innovative, affordable and accessible means that is focussed on e-technology.



Prior to founding COER, Robin was the founder and manager of the Food and Drinks Industry Benchmarking and Self-assessment Initiative in the UK involving over 500 organisations, and previous to this he worked as the Process Improvement Manager at Burton's Biscuits in Edinburgh. Robin obtained his PhD at Liverpool University in 1992. It was one of the first PhD's worldwide on Total Quality Management.

In total Robin has helped over 300 organisations undertake self-assessments using a variety of business excellence self-assessment tools. Dr Robin Mann is a trained assessor of both the EFQM Excellence Model and the Baldrige Criteria. Robin has written over 20 refereed journal papers for leading journals, written over 100 non-refereed papers and reports, written 6 short books, given 100's of professional presentations and is frequently a keynote presenter (invited to present at 11 countries in 2006).

## About BestPrax Club



**BestPrax Club**

The benchmarking centre for best practices

BestPrax Club is the Indian member of Global Benchmarking Network (GBN), founded by Dr Robert Camp, author of the seminal works on Benchmarking.

The GBN is an alliance of leading benchmarking centres worldwide who share a common vision and mission. Current Membership comprises 25 benchmarking centres which represent more than 30,000 businesses and government agencies.

Our mission is to facilitate sharing, learning, and growing of best practices in India and overseas, through active networking, education, research, and consulting.

## Services

### BestPrax Membership

Join the BestPrax Club to learn and share best practices; and to evolve innovative next practices. Exclusive services available.

### BestPrax Benchmark

Compete with the best for three Benchmark awards:

1. Leadership Governance
2. Management Governance
3. Operations Governance

Get invited to participate in the GBN Global Benchmarking Award competition.

### BestPrax Publications

BestPrax publications aim to showcase Indian best practices within the Global Benchmarking Network.

- BestPrax Insights
- BestPrax Epsilon
- GBN Report

### BestPrax Rating

Rate your 12 management categories with our BestPrax Barometer. Earn a BestPrax Rating Certificate for each management categories.

### Training & Research

In partnership with GBN Members, BestPrax Club offers a range of services including benchmarking workshops, benchmarking studies, and best practices mining. Services also extend to developing innovative next practices.

### Special Services

- BestPrax Conclave
- BestPrax Prize
- Benchmarking Club - BFSI sector

## Partners



**BCS MANAGEMENT SERVICES**

## Contact

Anand Mehta, Senior Consultant  
BestPrax Club Pvt. Ltd.  
4B Sindhu House, Nanabhai Lane,  
Fort, Mumbai 400001, India  
Phone: (91-22) 6634 8701  
Email : info@bestpraxclub.com