

# Organizational Excellence Specialists



## First Global Assessment on the Current State of Organizational Excellence

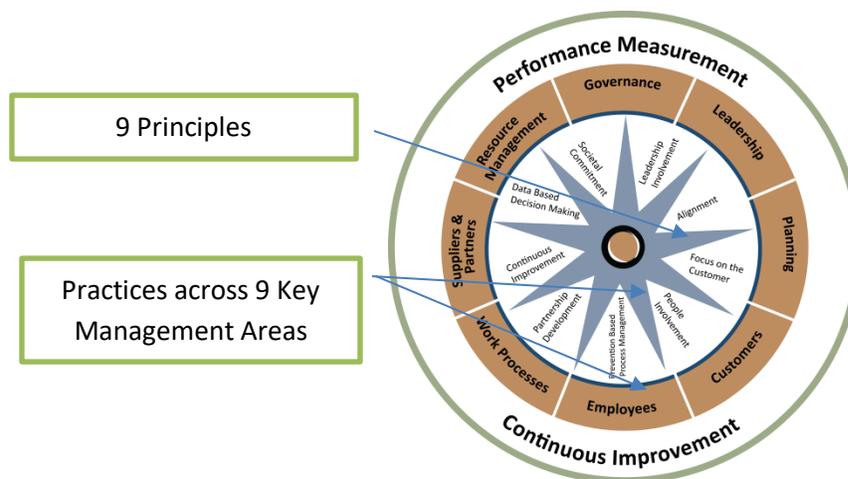
### A Snapshot of Brazil



The 'First Global Assessment on the Current State of Organizational Excellence' was launched in May 2015 by the Organizational Excellence Technical Committee (OETC) QMD ASQ and conducted voluntarily by Organizational Excellence Specialists in Canada. Please click on the following link to read background on the study and to download the full report that was completed on April 4, 2019 <https://organizacionalexcellencespecialists.ca/workshops-events/global-oe-index/>

The assessment tool was based on the Organizational Excellence Framework (OEF) that was developed in Canada. This model integrates leading excellence models, that define the principles of a culture committed to excellence and the best management practices used by high performing organizations. The model is unique in that it provides implementation guidelines for the user.

Figure 1 - Organizational Excellence Framework (©2010 Dawn Ringrose)



The study had a total of 1,029 respondents from organizations that provided feedback on the extent to which their organization was characterized by the Principles and had deployed the Practices. 791 of

respondents (77%) completed the Teaser Assessment on the Principles and 238 (23%) completed the Full Assessment that included both the principles and practices.

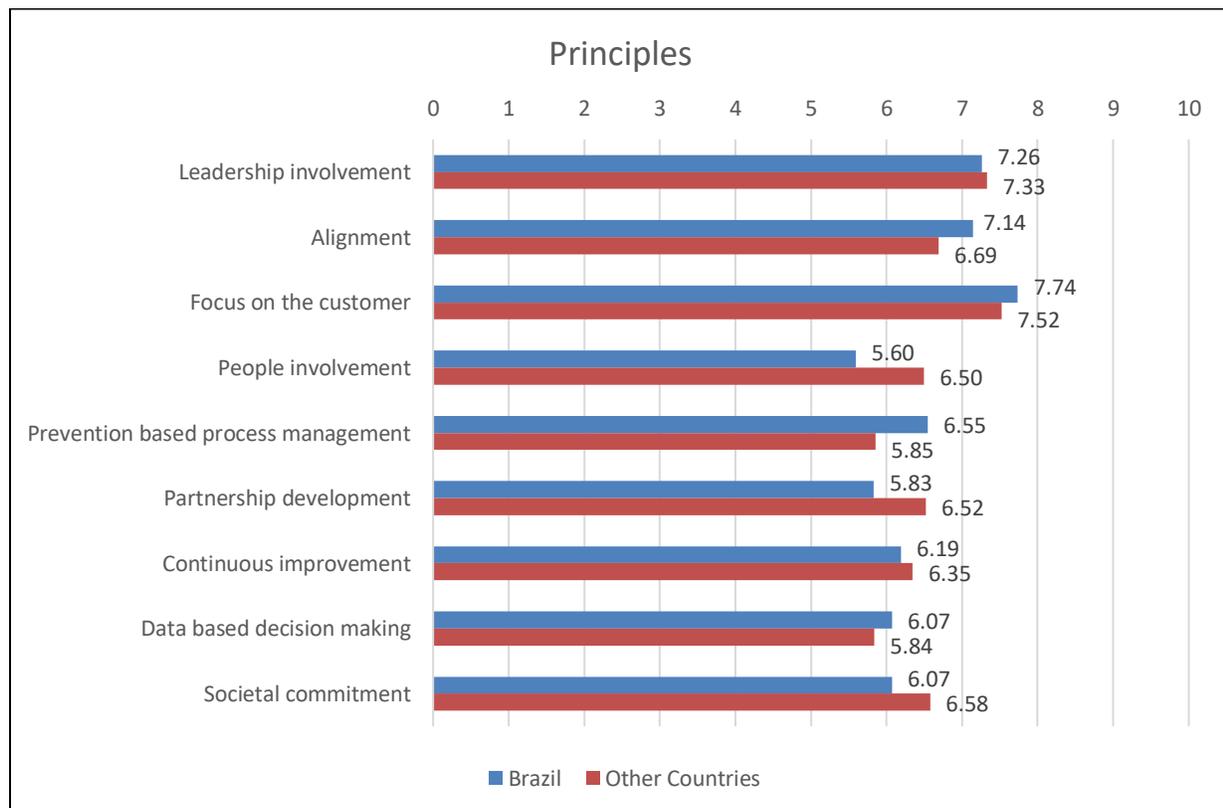
Of these respondents, the participation of Brazilian organizations figured prominently at 21 (2.7%) respondents for the Teaser Assessment and 2 (0.84%) respondents for the Full Assessment. This blog provides a closer look at the results for Brazil versus Other Countries.

### 1.0 Teaser Assessment Only

Overall, the aggregate results for Other Countries suggested that most respondents rated the Principles quite positively (Figure 2) with an overall average of 6.58. Of the nine principles, the highest rated (>7.0) were Leadership Involvement and Focus on the Customer and the lowest rated (<6.0) were Prevention Based Process Management and Data Based Decision Making.

For Brazil, the overall average was slightly lower than Other Countries at 6.49. The highest rated Principles were the same however the lower rated were People Involvement and Partnership Development. In comparison to Other Countries, Brazil had slightly higher ratings on four Principles (Alignment, Focus on the Customer, Prevention Based Process Management, Data Based Decision Making) and lower ratings on the remaining five.

Figure 2 - Teaser Assessment on the Principles



To improve the ratings on the lowest rated Principles (People Involvement, Partnership Development) for Brazil, it is important to consider the interrelationships between these Principles and directly related Practices. This document provides an illustration of the direct relationships

[https://organizationalexcellencespecialists.ca/wp-content/uploads/2018/03/OES\\_RelationshipDocument\\_March28.pdf](https://organizationalexcellencespecialists.ca/wp-content/uploads/2018/03/OES_RelationshipDocument_March28.pdf)

People Involvement has 33 touch points for small, medium and large size organizations and 20 touch points for micro size organizations (\*) and Partnership Development has 14 and 6 touch points respectively.

The touch points for the lowest rated Principle, People Involvement, follow:

- Governance:
  - 1.4 Establish governance processes at all appropriate levels in organization
- Leadership:
  - 2.1 Develop corporate statements\*
  - 2.2 Communicate corporate statements to all levels \*
  - 2.3 Identify factors that will contribute to organizational success
  - 2.10 Promote teamwork amongst employees\*
  - 2.12 Share responsibility, accountability, & leadership throughout the organization
  - 2.13 Link senior management rewards & recognition to organizational performance
- Planning:
  - 3.2 Create business plan with objectives, measures & initiatives that support strategic direction\*
  - 3.5 Allocate resources to ensure effective implementation of the business plan
- Customers:
  - 4.4 Align employees on the importance of the customer\*
  - 4.5 Train & empower employees to be advocates for the customer\*
- Employees:
  - 5.1 Undertake human resource planning that supports organization goals & objectives\*
  - 5.2 Recruit & select people for mutual success\*
  - 5.3 Promote equal opportunity & diversity
  - 5.4 Ensure people understand & commit to the strategic direction & improvement goals
  - 5.5 Get people involved with improvement initiatives
  - 5.6 Encourage employees to share ideas & suggestions\*
  - 5.7 Encourage employees to be innovative & take risks
  - 5.8 Determine training needs of employees & provide the necessary training\*
  - 5.9 Ensure employees have adequate compensation & benefits\*
  - 5.10 Reward & recognize strong performance of both individuals & teams\*
  - 5.11 Ensure healthy workplace environment & involve people in addressing issues\*
  - 5.12 Remove barriers to employee effectiveness
- Work Processes:
  - 6.1 Design & document key processes\*
  - 6.7 Analyze processes on regular basis & make changes aimed at improvement\*

- 6.8 Communicate changes in process to all employees that touch the process\*
- Suppliers & Partners:
  - 7.3 Share information with suppliers & partners that links to strategic & business plans\*
- Resource Management:
  - 8.1 Define resource requirements\*
  - 8.7 Provide appropriate access for stakeholders to relevant knowledge & information
- Continuous Improvement:
  - 9.1.5 Employees\*
- Performance Improvement (Key Management Areas):
  - 9.2.5 Employee measures
- Performance Improvement (Organization):
  - 9.3.10 Employee satisfaction\*
  - 9.3.11 Employee morale

It is recommended that organizations taking the Teaser Assessment, also take the Full Assessment to identify low rated Practices at the touch points. This way, they can focus on improving these Practices in order to increase the rating on the corresponding Principle.

## 2.0 Full Assessment

The Full Assessment required the respondent to self-assess against the 9 Principles (Table 1) and also the Practices across the nine Key Management Areas (Table 2). In the OEF, there are 9 Principles that each have touch points with directly related Practices. And there are a different number of Practices depending on size of organization with 51 Practices for micro size and 102 Practices for larger size (i.e. micro – 1-25 employees, small -25-100 employees, medium- 101-999 employees, large - 1000+ employees).

Table 1. Principles and Touch Points with Practices for Different Size Organizations

Principles	Touch Points - SML	Touch Points - Micro
1. Leadership Involvement	25	10
2. Alignment	16	9
3. Focus on the Customer	21	13
4. People Involvement	33	20
5. Prevention Based Process Management	29	14
6. Partnership Development	14	6
7. Continuous Improvement	50	15
8. Data Based Decision Making	54	22
9. Societal Commitment	20	6

Table 2. Key Management Areas and Practices for Different Size Organizations

Key Management Area	Practices - SML	Practices - Micro
1. Governance	6	1
2. Leadership	15	5
3. Planning	9	4
4. Customers	9	8
5. Employees	12	7
6. Work Processes	10	8
7. Suppliers & Partners	5	3
8. Resource Management	8	3
9. Continuous Improvement & Performance Measurement		
• Continuous Improvement	8	8
• Performance Measurement (Key Management Areas)	8	0
• Performance Measurement (Organization)	12	4
Total Practices	102	51

At this point in time, no conclusions from the Full Assessment may be drawn for Brazil as only two organizations participated.

To better understand the current state of excellence for the country, more respondents are required to provide a good cross-section by organization size and industry sector ( $\geq 25$ ). With more robust data, the country can build on strengths and address opportunities for improvement. For the latter, each of the low rated Principles can be studied against the touch points on corresponding low rated Practices to identify where to concentrate effort. For each of the corresponding low rated Practices, there will be an opportunity to improve either the approach being used, deployment across the organization or results being achieved.

### 3.0 Are You Ready to Take the Excellence Challenge, Brazil?

Participation on the Teaser Assessment against the Principles has indicated that organizations in Brazil have a favorable commitment to excellence. To get a more detailed snapshot of Brazil, it will be necessary to attract greater participation in the Full Assessment against the Principles and Practices.

In the meantime, it is recommended that leaders familiarize themselves with the OEF publication, self-assess against it and work towards successfully deploying the Practices throughout their organization. Both the publication and the automated assessment and reporting system provide implementation guidelines to address gaps. And licensed professionals are available to further augment these tools and assist with special expertise as required.

This undertaking will enable more organizations to realize the *Formula for Success that is available with an excellence model = Implement the practices, develop a culture committed to excellence, Achieve exceptional results across a balanced set of measurement*. In doing so, we can elevate Brazilian organizations to the desired level of performance and remain competitive with other countries.

Are you willing to take the excellence challenge, Brazil?

We certainly are! Contact us to discuss how to address your challenges and improve performance.

And stay tuned for a follow-on presentation that will share even more detail on the Brazilian results.

**About the author:**



*Dawn Ringrose MBA, FCMC is Principal of Organizational Excellence Specialists and Author of the Organizational Excellence Framework publication and related toolkit. Her qualifications include: Certified Organizational Excellence Specialist, Certified Excellence Professional, Registered ISO 9000 Specialist, Assessor of Quality Systems. She has worked in the area of organizational excellence since 1990 and currently serves as an Executive Team Member of the Organizational Excellence Technical Committee and a Member Leader with the Quality Management Division ASQ, Board Member of the Global Benchmarking Network and Advisory Board Member of ISCM Foundation. She can be reached at [dawn@organizationalexcellencespecialists.ca](mailto:dawn@organizationalexcellencespecialists.ca)*

**About the contributor:**



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