The Institute of Management Services is the primary body in the UK concerned with the promotion, practice and development of the range of methodologies and techniques for the improvement of productivity and quality, known collectively as ‘Management Services’. This embraces the disciplines of industrial engineering, work study, organisation and methods, systems analysis, and a wide range of management information and control techniques as illustrated in our Body of Knowledge.

The Institute acts as the qualifying body for the Management Services profession in the UK, focusing developments in practice and knowledge and acting as a forum for information exchange. This in turn enables our members who work under a variety of job titles across the whole of the UK economy, to make a more effective contribution to the well-being of their own organisation and to the nation’s economy as a whole.

In addition to creating and upholding professional standards for the practice of management services through the adoption of a code of ethics and the provision of a system of qualifying examinations, the Institute of Management Services collaborates with national and international professional bodies in similar fields.

The Institute is a member of, or represented on, a number of other bodies including the World Confederation of Productivity Science, the European Federation of Productivity Services, and the European Institute of Industrial Engineers.

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Cover Story

The 16th World Productivity Congress and European Productivity Conference was held 2-5 November 2010 at the Maritim Pine Beach Resort-Convention Centre, Belek-Antalya, Turkey. Dr Andrew Muir IMS Deputy Chairman and WAPS Fellow reports on day one of the Congress.

Institute and Regional News
Including the Chairman’s report, and student graduation news.

16th World Productivity Congress
A report on the speakers and proceedings from day one from Andrew Muir

People Driven Productivity
Lean for small businesses by Professor Hendrik Van Landeghem and Joris April of Ghent University, Belgium

Office Skills
Lean and continuous improvement in the office by Mike Keen and Carl Evans

Change Mastery
The persuasion paradigm by Philip Atkinson, who highlights the need for professionals to complement their technical skills with soft skills

Time for Change
Part II of Dr John Chamberlin’s paper which analyses business process re-engineering

Graduate News
Graduates celebrate the award of their IMS certificates

IMS Elections 2011
Nomination forms

Is Quality still Relevant?
Colin Coulson-Thomas reports on the 21st annual World Congress on Total Quality and asks is quality still relevant

Opportunity of a Lifetime
Winston Churchill Travelling Fellowships, a unique opportunity to travel and work abroad on a personal project
Chairman’s Column

As I have already indicated we as an Institute see our website (www. ims-productivity.com) as playing a prime role in communicating what our Institute is all about. I would invite members to view our website and evaluate its content and layout and email me at blanch2203@gmail.com with your views on the current website, together with any suggestions you may have for enhancements or improvements.

In July 2010, the Government White Paper: Equity and excellence: Liberating the NHS set out the Coalition Government’s vision for the future of the NHS. Included in these plans was a commitment to a programme aimed at improving ‘Quality, Innovation, Prevention and Productivity’ (QIPP). The initiative aims to place quality at the heart of the health service. However, in view of the current economic crisis, there is now a heightened sense of urgency to implement the fundamental principles of QIPP. The NHS has been tasked with identifying £15 to £20 billion in efficiency savings by the end of 2013/14, which must be reinvested into the service, if year-on-year quality improvements are to continue to be delivered.

The Government has declared that the NHS will be protected from the cuts experienced by other public services – this is a great gift, but it comes at a price. There will be no excuses for failing to deliver; there will be tough times ahead and expectations will be raised. The challenge to make savings via productivity improvements so that these savings can be reinvested to bring about improvements in quality is commendable, as often the focus on quality improvement can result in a lack of productivity improvement as quality becomes the Holy Grail. Clearly the Coalition Government has recognised that quality and productivity are linked and that improved productivity can release existing funding to bring about quality improvements, without the need for the investment of new money. It is pleasing to see that the Government is recognising the role that productivity can play within the National Health Service in helping the country overcome the present financial crisis. Of much less merit is the financial saving being made in local government via shedding labour without any apparent plan or strategy for improving the quality of service being provided to the public.

One of the pleasures of being Chairman of the Institute is attending functions and meeting Institute members. Recently I attended the headquarters of Scott Grant, one of the Institute’s main education providers to present the organisation’s Student of the Year Award. It was doubly nice for me as the student was Steven Moody, a fellow Liverpudlian who is an employee of Asda (see page 34 for the full story on the awards). It brought back to me memories of my own time as a student sitting the Institute’s examinations in 1969 and all the friendships I have made in my 42 years as a member of the Institute. I would never have dreamed 42 years ago when I joined the Institute as a student member that I would one day have the honour of serving as its National Chairman.

As always I welcome your comments and observations on our Institute and can assure you that myself and all the members of the Institute’s Council of Management strive to ensure the IMS is recognised as the premier authoritative body in the UK able to speak on productivity matters.

David Blanchflower, Chairman

Communication is perhaps one of the most important things in our lives, how we communicate can project a negative or positive image of what we are seeking to say depending on how we communicate our message. Our Institute is fortunate to have a quarterly journal and more recently a regular email newsletter by which we can communicate to the membership. Over the past year, we have upgraded our website which is the Institute’s face to the world. Via the website, we seek to communicate to the world at large the need for productivity improvement and how increased productivity can result in higher standards of living. Increased productivity in the third world would almost certainly improve the lives of so many people now living in poverty. Even as I write we are seeing great unrest in the Middle East, with the population of many countries very forcibly indicating they want better standards of living and changes to the country’s leaderships.
A personal note to members from Andrew Muir

I was privileged to represent the IMS at the World Productivity Congress held in Turkey in November 2010. This is the third world congress that I’ve been fortunate enough to attend and I’m currently in the process of writing several articles on the event for publication in the Institute journal.

In going through my notes, there are two items of particular importance which I feel would be remiss of me not to bring to your attention.

The first of these relates to the Presidency of the World Confederation of Productivity Science. I’m sure you will be aware that this is currently held by John Heap, a past Chairman of the IMS and a member of the Institute’s Council of Management. However, what you will not be aware of, is just how much John is respected throughout the world for his knowledge, experience and expertise in the field of productivity. A global player, he travels extensively in his role as President, promoting the WCPS’s message of ‘Peace and Prosperity through Productivity’. He also never misses an opportunity to promote the IMS for which I, for one, am extremely grateful. If I may therefore, on your behalf, congratulate John on his election to the Presidency, and ask him to keep up the good work.

The second item, relates to David Blanchflower IMS Chairman, and the Fellowship he received from the World Academy of Productivity Science. One of only two Fellowships to be awarded to individuals from Europe. The citation reads, “David Blanchflower has been elected to the World Academy of Productivity Science by virtue of significant and long-lasting contributions to the improvement of quality of work, quality of work life, quality of life and productivity” The honour is well deserved and a recognition for almost four decades of contribution to the productivity profession at the highest level. I am also personally pleased because, as an existing Fellow of the Academy, I fully supported David’s nomination. If I may therefore, on your behalf, congratulate David on receiving his Fellowship and, as with John Heap, ask him to continue to keep up the good work.

Dr Andrew Muir
Deputy Chairman

Regional News

North West

An invitation
The North West Region Board arranges lectures and visits to manufacturing enterprises and other institutions, and generally promotes the interests of the Institute. The Board has vacancies for additional officers and IMS members living in the region are invited to apply for these positions.

The Board has about eight events per year, including visits and formal meetings. Board meetings are held in the Bolton area, on Saturday mornings.

These positions are voluntary, but members are rewarded with interesting contacts in industry and convivial discourse with like-minded colleagues.

Aspiring applicants should contact Kevan Kelly on 01257 271066 or Harry Hogg on 01942 863776.
Scotland

API games night
The API (Association of Professional Institutes) held its annual games night on 26 November 2010 at the New Club, Kirkcaldy. The event, which was once again organised by Bob Smith, IMS Scottish Region Chairman, was well attended and a great success. The eventual winners were Jim and Mary Dunsmore representing the Chartered Management Institute. In presenting the trophy, Bob Smith indicated that Terry and Lynn Watt had provided the food for the evening at no charge which would enable him to donate a record amount of monies to Children in Need.

API Annual Deliberation to be postponed
Members are asked to note that the API (Association of Professional Institutes) Annual Deliberation to be presented by Dr David Munro has had to be postponed for a second time due to unforeseen circumstances. For further information contact Bob Smith, Scottish Region Chairman on 01592 758252.

Apology

Apologies for not attributing an article published in the winter journal, ‘An Evaluation of Systems Thinking in the Care & Support of Older People’ was written by Joe Marshall, Faculty of Business, Computing and Law, University of Derby. The references to this piece were also missing.


IMS certificate students who were awarded the IMS certificate in 2010
Mrs Nicola Axford
Mr Ged Bagnall AMS
Mr Iain C Bennie
Miss Senzukuthi Bhembe
Mr Colin Byers
Mr Jonathan Cartthew
Mrs Lomakhosi G Dlamini-Vilakati
Ms Dudu K Dlamini
Mr Goodman S Dlamini
Ms Hlobisile Dlamini
Mrs Nompumelelo P Dlamini
Mr Samkeliso Dlamini
Mr Michael Driscoll
Mr Julian Mark Dyson
Mr Sudath S Ediriarchchi
Miss Beverley Gilkeson
Mr John Grierson
Mr Richard Hanlon
Miss Patience N Hlophe
Mr Malcolm Holmes MMS
Miss Khangezile H Jele
Miss Laura King
Mr John B Knight
Mr Jonathan S Kyle AMS
Ms Leanna Lane
Miss Nompumelelo M Mabuza
Mr Goodwill B Masetbula
Mr Steven Moody
Miss Heather Moore AMS
Mr Themba J Motsha
Ms Gcina S Ndlalangamanola
Miss Lisa Nicholson
Miss Tsetutu L Nxumalo
Mr Terry O’Neill
Mr Gavin Osborn
Mr Glenn Pallan
Mr Brian Patterson
Mrs Elaine Pattison
Mr Anthony Peet AMS
Mr Martin Perkins
Mr Martin J Rae
Mr Piyal S Sandara
Marakalagie
Mr John Sayers
Mrs Lungile P Shongwe
Miss Wendy K Shongwe
Mr Sabelo Sifundza
Mrs Hannah Slack AMS
Mrs Judith I Stoker
Mrs Matsidiso Thwala
Mr Peter G Waller AMS

IMS Diploma – students who were awarded the IMS Diploma in 2010
Mr David E Parkes MMS
Hewlett-Packard ‘Black Belts’ from around Europe, hand-picked to study for the tailored Masters degree in Strategic quality management at the Portsmouth Business School, have heralded the course a success.

The HP employees, known as ‘Lean Sigma Black Belts’, are an elite group of individuals trained to use Lean methodology, which is based on identifying waste within an organisation and focusing on customer needs. Half way through the programme, they are reporting a significant change in how they work within the company.

Employee and student Ray Dodd said: “The course challenges my inherent beliefs, attitudes, behaviours and takes me well outside my comfort zone. I’m learning all the time and the tutors really provoke thought, self reliance and self belief.”

Hewlett-Packard, which has approximately 304,000 employees worldwide, identified Ray and 20 key contributors from their Lean Sigma community for the work-based learning programme. Each individual has taken on a specific business project, fundamental to the organisation, to form the basis of their studies.

The new, tailored delivery of the existing Masters qualification in Strategic quality management has been designed by the university in collaboration with HP, one of the globe’s most recognisable IT brands, to assist in meeting its strategic objectives of enhanced customer responsiveness and efficiency.

HP employee and student Mihaela Stancu said: “The course is providing me with a strong foundation for developing competent business knowledge and better understanding of how HP as a company operates. It has also enabled me to apply the knowledge I have gained within my working area straightaway.”

The MSc programme is designed to last around 18 months at which point the students’ strategic goal should be achieved. The individuals receive their Masters qualification in recognition of researching global good practice relevant to HP.

Course leader, Barbara Savage, said: “The course team have worked closely with HP to develop a new way of delivering the existing MSc in strategic quality management so that it complements HP’s Black Belt training programme and integrates effectively with the students’ day to day quality improvement activities. This approach adds value to the technical content of the course, while retaining the rigour and academic standards appropriate to a Master’s qualification.

“In addition, this special delivery mode provides an efficient way to enhance the students’ knowledge and capabilities in a relatively short timescale. Just two months after the conclusion of the first university-based study week, students were reporting measurable benefits to the company that could be directly ascribed to their studies at Portsmouth, and which went well beyond that which had been anticipated.”

Students spend two week-long sessions at the university and the remaining study is done via distance learning with access to e-learning facilities and direct contact with their university mentor.
The 16th World Productivity Congress and European Productivity Conference was held 2-5 November 2010 at the Maritim Pine Beach Resort-Convention Centre, Belek-Antalya, Turkey. The theme for the Congress was ‘Productivity at the Crossroads: Creating a Socially, Economically and Environmentally Responsible World’.

The Congress was, for the first time, held in partnership with the European Productivity Conference, and was thus jointly organised by the World Confederation of Productivity Science and the European Association of National Productivity Centres. The host organising body was MPM, the National Productivity Centre of Turkey.

In order to give some indication of the scope of the Congress, there were no fewer than 150 papers presented in five separate streams running in parallel over three days. In addition, there were seven keynote speakers and John Heap, a past Chairman of the IMS and current President of the WCPS, delivered the James L Riggs memorial lecture. Supplementary to this, was a poster programme with some 23 posters on display, illustrating projects currently being undertaken on such diverse subjects as ‘Shanghai’s Economic Growth and the Influences of Its Industrial Labour Productivity Since the Reform and Opening-up’ and, ‘Business to Business Online – The New Paradigm of Productivity Growth in the Romanian Trade Area’. All in
all, a very intense three days for the 400 plus delegates from 25 different countries, that were in attendance.

Opening of the Congress – day one
The President of the Republic of Turkey, His Excellency Abdullah Gul’s message to the congress was: “Today, the need for re-evaluating the world’s economic circumstances in line with productivity principles is a must. Keeping the balance between the unlimited needs and the limited resources will be succeeded only with collaboration of the world’s capacities at the international level in all fields”. His message went on, “I would like to emphasise my conviction that instead of wasting the world’s resources by neglecting to use rational and productive methods; increasing global wealth, providing wealth with fairer distribution at the national and international levels, sparing resources for combating hunger and poverty will contribute to world peace. The republic of Turkey has always been a supporter of such activities”. His message concluded, “At the congress, the effects and the results of the global crises will be discussed and the experiences of the countries about overcoming the crises will be shared, the solution suggestions of different countries will be discussed and the crises the world is going through will be examined extensively in the framework of productivity. Consequently, I would like to state my contentment and support for the 16th World Productivity Congress and the European Productivity Conference 2010 taking place in my country.”

MTM Visual Inspection
The association has successfully completed its first 3 day course for 8 delegates in MTM VISUAL INSPECTION for a large vehicle manufacturer.

The comments made by some of the delegates where:
“For me, the course gives us a tangible predetermined timing system that we can apply to all our visual inspection processes.”
“Worthwhile and well run course that fully meets the need of our quality department”
“Ideal for quality inspection - fills the gaps that the standard UAS course leaves”
“The course was valuable for the Quality Kaizan team, much of what we do is based on Visual inspection so we will use it. For us it gives us a better understanding of, e.g. when we are performing paint checks on a panel.”

The Association still provides training in each of the following techniques; MTM UAS, MTM 1 and MTM 2, both on-site at client premises, or as distance learning for individuals wishing to further their manufacturing knowledge, an email to the address shown will generate an immediate response. Any person previously trained in any of these techniques who is not currently a member of the Association is invited to join us in delivering the best work measurement solutions ever devised. Persons trained in MTM1 are especially welcome to further develop their skills to become Instructors in any, or all, of the current IMD standards.

For more information please contact us. ukmtma@googlemail.com ukmtm.co.uk

High unemployment, unsolved problems in financial systems, ongoing uncertainties regarding exit strategies from accommodative fiscal and monetary policies and households unwilling to borrow more in economies that suffer asset price busts, suggest that it will take a long time for the global economy to completely recover.
thus minimising the adverse impact of the global crisis. As a result, Turkey, like many other emerging economies, which were once associated with significant risk, showed more resilience than expected during the crisis and this had changed risk perceptions. Turkey is now the 16th largest economy in the world.

Mr Yilmaz said that sustainability of productivity growth will be a key factor for all countries in the future, as will be ‘green’ technologies. Turkey is dependent on others for energy, therefore the development of wind, water and solar generated power will be essential.

In concluding his presentation, he said that currency has a significant impact on all economic factors and a strong banking sector was essential in a world market where financial systems were so interdependent. Finally, he wished everyone an enjoyable and productive congress.

Keynote speaker – Prof Frank D Pot – Professor of Radbout University, the Netherlands.

Frank D Pot is Professor of Social Innovation. Social innovation is complementary to technological innovation. It covers dynamic management/absorptive capacity, working smarter, flexible work organisation, developing talents, new employment relationship. Its objectives are a better quality of work and a better performance of the organisation.

Professor Pot’s presentation concentrated on workplace innovation which he said was critical for productivity gains. We need to produce 50% more with 50% less people/resources and the way to achieve this is through innovation. It is essential that we utilise the skills of the workforce and other stakeholders he said, and cited several examples, one of which was IKEA where short meetings are held in the workplace where all stakeholders get together to discuss issues and the resultant changes are implemented within a few days. Quick and effective.

In comparing technical innovation with non-technical he said studies had shown that technical innovation represented 25% of all innovation compared to non-technical innovation representing 75%.

In concluding his presentation Professor Pot re-emphasised the importance of utilising the skills of the workforce which he said was critical for workplace innovation.

In the afternoon of day one, I chose to attend a series of presentations on Productivity in Sports. Principally, because I was intrigued and interested to find out just how the subject had been approached.

Session 1 – The effect of sponsorship relations of sports federations and the level of institutional sufficiency on productivity.

The basis of this presentation was the result of research into the effects of sponsorship on the efficient running of sports federations. The research took the form of a 38 question questionnaire/survey and was directed at the president, secretary general and ace presidents of the federations.

The results of the research have shown that the efficiency of sports services will increase if the institutional levels of the sports federation increase. All streams of income are being researched including: merchandising, product licensing, franchising, fan cards, stadium marketing, etc in order to improve the product/experience for
the spectator. Interestingly enough, we were advised that the most successful sports club in Turkey, in commercial terms, is Fenerbahce – the range of sports covered by the club include: football, basketball, volleyball, boxing, swimming, table tennis, rowing, athletics etc.

**Session 2 – the relationship of the controlled activity and institutional productivity at sports services**

The basis of this presentation was research that had been carried out on the relationship between controlled activity (inspections) and institutional productivity (efficiency). Some 373 sports managers took part in a 45 question questionnaire/survey.

The results of the research has shown that the efficiency of the sports services will increase as the inspection activities increase. Further research is being done to establish the ideal inspection regime required to achieve optimum productivity.

**Session 3 – financial productivity of sports clubs**

The basis of this presentation was the outcomes of research aimed at evaluating solutions for the financial problems of clubs and how to increase each club’s productivity. Of particular concern, was the continuing failure by the Football Federation to fulfil the financial criteria set by UEFA and the potential consequences of this. The research consisted of ‘in-depth’ interviews and a 26 question questionnaire.

Results showed that there was general agreement that the state could not provide enough money to sustain clubs, therefore sponsorship was essential. There is a need for marketing expertise at every club in order to exploit royalty potential, promote licenced products, increase the value in copyright auctions, improve the utilisation of stadiums, etc. The research has also shown that there is a need for each club to be able to ‘grow their own people’ through better youth development systems. Clubs can no longer afford high transfer fees for star players.

As I stated earlier, I was intrigued by the heading ‘Productivity in Sport’ and was interested to hear about the outcome of the research. My general conclusion, is that sport is no different from any other business; it’s about increasing revenues, reducing costs and improving resource utilisation.

Day one of the congress concluded with a cocktail party, an ideal opportunity for networking and meeting old friends, an integral part of the whole event.

**Dr Andrew Muir**

A report on day two of the congress will be published in the next edition of *Management Services*. 
Lean as structured method to improve productivity has earned its undisputed place during the last 10 years. The combination of a people-oriented philosophy, combined with simple but effective methods, has led to considerable improvements in almost all industry sectors. However it becomes increasingly clear that introducing Lean requires knowledge and efforts that are outside the possibilities of small businesses. The paper reports on the preliminary results of a concerted research effort towards an effective method to introduce Lean in small production enterprises (SMEs).

As low-wage economies are growing rapidly, EU manufacturers are under increasing pressure to be more innovative and flexible. Lean manufacturing is a proven method of increasing productivity. While large companies seem to have embraced manufacturing philosophies such as Lean and Six Sigma, empirical evidence suggests this is not the case for SMEs as reported by Shah & Ward, (2003): ‘despite organisational inertia effects, large firms are more likely to implement lean practices than their smaller counterparts’. (Von Axelson, 2009) adds that Lean knowledge is mainly tied up in large manufacturers and has not widely spread among SMEs. SMEs, ie companies with less than 250 employees, are however very important within the EU economic structure. In a recent annual SME report commissioned by the European Commission, (Audretsch et al, 2009) the importance of SMEs is evidenced: 99% of Europe’s non-financial companies are SMEs, accounting for 67% of employment. As (Antony et al, 2005) rightfully state, SMEs also act as suppliers to larger organisations and thus achieve a ‘footprint’ that is even larger than these numbers suggest. While SMEs are shown to have a lower labour productivity and lower profitability than their large counterparts (Van Volsem & Van Landeghem, 2009), they are acknowledged as essential for economic growth, innovation and knowledge transfer.

Trying to understand
The main goal of the method is to instil a sustained improvement drive among the workforce. The difficulties SMEs have in implementing Lean, we could start by studying what diversifies them from their large counterparts (Von Axelson, 2007): Resources, Management and Organisation. SMEs have clearly less resources, both in time and money. Their management style tends to be short-term oriented (Antony et al, 2005) without much strategic alignment and performance follow-up (Smart et al, 2004). However, the management team is usually small and centralised, multi disciplinary ‘hands-on’, informal and people oriented (Ghobadian et al, 1996). Each of these last elements seems to be rather beneficial for a Lean programme to be implemented. Good top-management leadership has higher leverage in small companies and is the major critical success factor for Lean in an SME (Achanga et al, 2006).

From the above reasoning one could conclude that SMEs offer a more suitable environment for successful Lean implementation. However, limited resources (skills, labour time and financial resources) cause major implementation difficulties (Antony et al, 2005). In practice this is the limiting factor for an SME’s Lean implementation efforts, while (Achanga et al, 2006) finds Finance and Skills/Expertise to be two of the critical success factors. So the challenge is to find a method that exploits the strengths of SMEs, while avoiding their limitations.

**Project ERIP: European Regions for Innovative Productivity**

The strategic importance of SMEs and their limited ability to attract knowledge to boost labour productivity and competitiveness have incited the EC to support the European Regions for Innovative Productivity (ERIP) project through the ‘Interreg North Sea Region’ programme. The project is a partnership between local government (regional development agencies), knowledge institutions and private companies, from six regions within England, Belgium, The Netherlands, Germany, Sweden and Norway.

The project wants to facilitate Lean implementations in SMEs by testing a ‘Lean change methodology’ adapted to small companies, and by setting up a knowledge network – the so called ‘Innovative Productivity Centres’ – that actively provides support, training and knowledge exchange in each partner region. 24 SMEs are actively testing the method. Knowledge networks are an adequate way to introduce Lean principles in SMEs, as backed by Swedish empirical research in (Von Axelson, 2009). The challenge however is that both the network itself as the transferred knowledge and improvements in the individual companies need to be sustainable. A performance pattern that typically emerges in SMEs implementing Lean techniques is initially encouraging results, but a later fall back (typically within two years after implementation start – scenario Band C in Figure 1). Sustainability in improvement for an SME means continuing the improvement effort (Bateman & David, 2002) be it with or without external support (A in Figure 1).

**The framework of the lean change methodology**

The Lean change methodology as tested in the ERIP project has been based on the experience in the different participating regions, most notably the MAS-NEPA method in England (Herron & Braiden, 2006), which has already helped more than 150 companies achieve sustainable productivity improvement. However, none of the experiences was within small companies. The ERIP method therefore can be considered as a stripped down version, maximising effect from minimal theoretical effort. This is backed by (Mulhaney et al, 2004): companies struggle to appreciate how to implement solutions, not which to implement. The methodology consists of a stepwise approach in four phases: initiation, improvement cycles, KPI introduction and management consolidation.
Initiation

It is of crucial importance to start off on the right foot: typically SMEs have already been through several attempts at structural improvement and expectations are normally very limited towards the new method. First management is required to sign a formal agreement, stating the requirements and engagements expected from them. By signing such an agreement, top management clearly demonstrates their commitment. Initial visits are very essential to build mutual trust; (Von Axelson, 2009) shows this is essential in an efficient knowledge network. Because SMEs generally have a limited management structure, the change agent(s) that will drive the continuous improvement efforts are identified beforehand. A general diagnostic is undertaken to describe the operations and to document the chosen focus area.

An introductory training to Lean is mandatory for the management team, in which they are clearly informed about the work force led continuous improvement cycles that will be started, which they will have to support and foster.

Then a showcase event is scheduled in which one specific area is analysed, problems identified, and improvement actions formulated and planned. This event is run by an expert, who guides a team from the SME through the different steps of the method in a limited time frame (typically one week). In the ERIP project the event was held in one of the SMEs, while employees from the others were present. The showcase makes the method very tangible, and proves that results can be obtained on short notice and by the team members themselves.

Local area improvement cycles

The main goal of the method is to instil a sustained improvement drive among the workforce. This is initiated by a brainstorming session among the workers, in which they can identify any problem they face in their daily jobs. Each problem is noted down on a yellow post-it and categorised on a board. Such a session lasts typically for 1.5 hours, yielding on average three problems per participant. This session has proven to be a very effective kick-off event, beating any theoretical explanations. Experience has shown that it eliminates issues which would otherwise hinder progress in the improvement cycle.

It creates a sense of trust, ownership and involvement in operators which see some of their (sometimes already timely) daily irritations and problems solved. With these problems, the workers can start engaging in improvement actions, following the well-known PDCA (Plan-Do-Check-Act) method proposed by (Deming, 1982). Progress is tracked.

Due to their size most SMEs have a flat organisation, simplifying the introduction of these review cycles. The review exposes SME management to the improvement cycles and their beneficial effect, which will engender support among management for those actions that need investments or encouragement.

Figure 2. Problem solving Fishbone diagram of SME 1
visually on wall-mounted checklists, listing problems, corrective actions and target dates. As needed for the improvement actions, short information sessions are held introducing specific Lean Tools. As the project progresses, some companies might move on from strictly local initiatives (5S, standard work, visual management) to value stream-wide workshops to improve flow, planning and production control, for example. A fixed minimal set of ‘before, during, and after’ measurements are decided upon for research purposes, but also for sustaining momentum in each company.

**Introducing KPI’s**

Once one or two areas are engaged (typically after a three to six month period), the first local measurements are gathered. These indicators are then linked to some general Key Performance Indicators. The KPI’s are purposely limited to ‘QCDI’: quality, cost, delivery and inventory. Every month the results are reviewed, and regular comparisons are made with peer companies participating in the project across regions. This peer comparison serves as a reinforcement to keep the momentum. If an SME is doing extremely well, it will motivate them. If an SME is lagging, then seeing that other SMEs achieve better results will reinvigorate them by showing that improvement goals are attainable.

**Management consolidation**

Obtaining sustainability is clearly the most difficult part of the method, as argued in the introduction. It is pursued along two action lines: the local exemplar and the management review. The exemplar is a (large) company that has reached excellence in Lean. Each region has enlisted the support of one or more of these companies, that receive regular visits from the SME’s operator teams and also explain some of their training methods. Not only does this show good practice, it gives the SMEs one more opportunity to meet, discuss and exchange experience with both peers and the exemplar company. It has been very clear in our recent empirical experience that the ‘peer group’ effect within the national and transnational SME clusters is very important; at informal discussion opportunities after common trainings, very vivid discussions and experience exchange take place.

The management review installs a regular cycle of short, action-oriented meetings around the visual tools, linking the work force to their line supervision, and the line supervision to management. Due to their size most SMEs have a flat organisation, simplifying the introduction of

While SMEs are shown to have a lower labour productivity and lower profitability than their large counterparts (Van Volsem & Van Landeghem, 2009), they are acknowledged as essential for economic growth, innovation and knowledge transfer.
these review cycles. The review exposes SME management to the improvement cycles and their beneficial effect, which will engender support among management for those actions that need investments or encouragement.

Results
The ERIP project has been running for a year now, and the first results are encouraging. Five of the seven ERIP SMEs have successfully executed improvement cycles in at least two areas of activity, engaging their workforces in a manner that they never have experienced before. Some of them already have solid bottom line results: productivity improvements up to 32% (figure 4), quality improvements of 50% saving considerable costs in testing (figure 3), aso. The SMEs that lag behind will be remedied by hosting a showcase event in their location. It seems to be an important trigger for both employee involvement and management commitment. Most SMEs are now entering phase III.

The manner in which the workforce has responded to the appeal for improvement initiative has been overwhelmingly positive. It proves that ‘people are not

SMEs offer a more suitable environment for successful Lean implementation. However, limited resources (skills, labour time and financial resources) cause major implementation difficulties.
against change, they are against being changed’. It has also shown that the carefully chosen steps of the method do work, and that productivity improvements can be initiated with limited time and resources and almost no cost. The results of this research will be published in an easy to read book, that will serve as a manual for SME’s.

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Engineers Without Borders

Engineers Without Borders-UK is an international development organisation that removes barriers to development through engineering. Our programmes provide opportunities for young people to learn about technology’s role in tackling poverty.

We are always on the look out for new volunteers, so to get involved or make a donation please visit out donations page at http://www.ewb-uk.org
In recent years, manufacturing units have sought to embrace principles of continuous improvement (Kaizen) and reduce waste in production processes. Moreover, the concept of ‘Lean’ has tended to concentrate on supply chain and logistics to form a more cohesive customer-supplier relationship that centres on end-to-end improvements (Hill, 2008).

However, if the organisation is viewed holistically, then those same principles should be applied to the office environment, potentially cutting waste by up to 80% (The Manufacturing Institute, 2008). Here, significant improvements in the performance of the office can be made by removing bottlenecks, reducing costs, eliminating errors and thereby offering a more efficient service to customers (Chaneski, 2005a). More importantly, as Lareau (2003) notes, the office can provide an organisation with a source of competitive advantage by improving administrative processes.

The need for lean in the office
Despite extensive use of technology in most offices, and typically, standardisation of forms and reports, some organisations struggle to accurately communicate key ideas, administrative teams continue to make the same order processing mistakes and service to customers remains unsatisfactory. Many problems in administrative functions stem from an inability to fix failing elementary processes. This can be exasperated by administrative managers ignoring the more mundane operations in order to be involved in larger, higher profile projects. However, the introduction of a new computer system for example, will not move the organisation to an administrative nirvana if the underlying administrative processes are not universally understood, sporadically followed, or not aligned with the needs of other stakeholders.

Consequently, launching a programme of ‘Lean in the office’ can bring opportunity for resolving these types
of problems. Chaneski (2005b) cites numerous case examples of companies that have identified potential for streamlining office activities, especially where employees are wasting time searching for documents that had previously been taken for action, resulting in customers not being called-back in appropriate time-frames. In a busy sales oriented environment where speed of response is of the essence, a delay in contacting the customer can rapidly lead to loss of business.

**What is Lean**

While Lean is a concept that is embodied in other management initiatives such as TQM and JIT, Slack et al (2010) recognises that Lean demands a strategic approach in seeking to eliminate waste in all operations. Lean is therefore more than a move toward seeking to reduce costs, but a strategic approach to create an operation that is fast, reliable and capable of producing goods and services that are of high quality and thus yield a source of competitive advantage. Similarly, Paluch (2008) warns that Lean is not a process of cutting resources, but actually a means of increasing capacity through seeking incremental improvements in operations. It is this incremental approach that differentiates lean from six sigma, which according to Gregory (2008), focuses on larger scale initiatives.

**Developing a lean approach for the office**

Launching a Lean in the office programme can be quickly initiated by conducting a waste audit. Here, the key is to get everyone to challenge whether the tasks they do actually add-value to the customer (internal or external). In particular, staff are looking for:

- Documents that have been misplaced
- Unclear, ambiguous or missing information
- Unnecessary walking (movement) or searching for information and equipment
- Processes that compete with each other or are ‘misaligned’ with other functions
- Staff adopting ‘off-line’ or ‘bespoke’ processes and systems, instead of

Lean is therefore more than a move toward seeking to reduce costs, but a strategic approach to create an operation that is fast, reliable and capable of producing goods and services that are of high quality, and thus yield a source of competitive advantage.
following established procedures.
- Staff double checking work

The waste audit gives a useful starting ‘kick-start’ for the programme. However, this needs to be supported by a more robust structure, especially to ensure that everyone is ‘on-board’ with the lean programme (Tiplady, 2010):

Set up the Lean team – which will be a steering group, comprising the administrative manager and administrative staff, with the remit to lead, and initiate the implementation efforts, and subsequently coach and mentor further improvement teams.

Mobilise continuous improvement groups. These will be charged with the responsibility to deliver the improvements. Here, specific targets, activities and deliverables, all linked in with the broad business objectives should be established. These groups keep the steering group informed about progress, noting in particular, wins and successes.

Develop Lean ‘champions’. Provide appropriate training and support for individuals to enable the momentum of the initiative to be carried forward and provide new impetus.

There are numerous tools and techniques that support the initiative, identifying in particular, improvement opportunities. These typically include: SS methodology, value stream mapping, and visual charts. Moreover, Dixon (2008) advocates the use of Lean Maturity Models, which provide a more comprehensive assessment of progress of improvement.

However, the ‘glue’ that holds the various components together is ‘short-interval coaching’, where words of encouragement, congratulations on successes and guidance/support where improvement initiatives are stalling are all important. Industry Week (2008) recognises that leadership and a clear demonstration of commitment to the lean office are vital.

The implementation of Lean in the office means that day-to-day process drift is no longer tolerated as the norm by staff. In addition, waste is removed and replaced by structure, discipline and ownership to ensure sustainable improvements over the long term, and as McKellen (2005) notes, lean in the office offers significant benefits to the business as a whole.

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Change Mastery
The Persuasion Paradigm

Success as a change agent of any description is based on your ability to influence others. Using authority and rank is a poor tool for persuading others and based purely on sanction. Here, Phil Atkinson highlights the need for professionals such as accountants, IT professionals, project managers, consultants, quality and manufacturing engineers, auditors, governance and risk consultants to commit to practice to complement their technical skills with behavioural and political mastery which includes using motivation, persuasion, influence and negotiation to win their case.

Change skills start with working with people, understanding their motivations and engaging and influencing them to look at things differently. I think we can all see the importance of this in the context of moving big macro corporate change programmes forward, as well as on the micro level with personal development.

Most of us enable change to take place, not through the use of authority and being assertive, but relying on the ‘meta’ skills of influence and persuasion. If we have to rely on our job titles or being of senior rank then that is a shame. As is too likely the case, often only a small percentage of any workforce have received training in this ‘soft skills’ arena, and yet it’s an area where rapid learning is experienced which does have a major impact on personal effectiveness.

I find it amazing that we get the balance between technical and soft skills training all wrong. Staff are trained to develop their technical skills in their core competence but the execution of their role and their effectiveness is achieved not by just demonstrating this facility, but the behaviours and skills that support them. Let me provide some examples.

**Telecoms and technical wizards**
We have all met the technical geek who is great at doing their job in isolation, but when required to interact with team members, customers and others, their degree of interpersonal competence erodes their confidence. Have you ever met engineers, accountants, lawyers, professional service advisors, IT specialists, actuaries, risk managers and others who would benefit from such training?

You know the impact that this can have on performance is enormous – especially if the account manager starts losing customers, the insurance agent loses the contract, the engineer alienates the single source preferred supplier or the technician notices that his
Staff are trained to develop their technical skills in their core competence, but the execution of their role and their effectiveness is achieved not by just demonstrating this facility, but the behaviours and skills that support them.

It’s not about manipulation, but getting a win-win for all parties.

If the average employer committed to developing superior development in behavioural mastery they could hugely impact their results for the better. The average advisory organisation has below par sales staff interacting with the customer. Developing techniques to move a client towards a win-win is ecological for both parties. Using guile or pushiness is for short term gain only, with buyer remorse the winner, you with depleted clients and a lousy reputation. As soon as you start to push the other person into a position you are moving towards win-lose – with you the loser.

It’s not soft skills – it’s hard skills
Although people refer to such development as ‘soft skills’ – the term is really a non starter because many people find these skills are difficult to establish and most fail to understand what they need to do to rehearse these skills until they have acquired mastery.

In honesty, we are pretty much programmed by paternal authority figures around us and this includes parents, grandparents, teachers, ministers and other care givers. At that age you

Confidence is an emotional state not a journey
Confidence and self esteem are not journeys which you embark upon and then arrive at some time in the future. They are emotional states that can be accessed anytime by anyone – you just have to know how and it can be learned easily. Early on in our workshops we deal with the issue of confidence and self esteem. You see, it is all geared around identifying issues and the presence of self limiting beliefs. I am told we are born into this life with two fears – the fear of falling and the fear of loud noises – yet we go through life picking fears up all the time.

Be vigilant: question your self limits constantly
Most of our beliefs have been created by others and what they say to us at an early age. We know, for instance, that most empowering and limiting beliefs are firmly in place by the time we are 6, 7 or 8. Please pay attention to the following. In terms of our brain evolution we do not have the cognitive ability to judge whether these beliefs are right, just and accurate about us at this age. Only at a later age would we have this ability. We have not developed the critical faculty at 6, 7 or 8. We develop our critical cognitive functions at 8, 9, 10 and 11. So tell me, how can we judge whether a negative belief about ‘self’ is accurate if we don’t possess the critical processing power to evaluate whether it is fair or not?

In honesty, we are pretty much programmed by paternal authority figures around us and this includes parents, grandparents, teachers, ministers and other care givers. At that age you
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don’t have to ability to judge whether a statement about your behaviour is accurate, fair or justified.

In our workshop sessions we say belief is a matter of choice – that is once you can be consciously aware of it and question its validity. Someone may say something to you “You are not good enough” or “You are like me, I was never good at school”. These are statements directed to you, fairly or unfairly, which you cannot challenge because this critical rational ability was probably not in place.

Our commitment is we think it’s a good idea to challenge these negative beliefs at the beginning of the workshop sessions rather than tackling them on at the end. It is central to development and self esteem.

Confidence is a big issue in business performance: case examples

We designed workshops on interpersonal influence and presentation skills for groups of internal auditors within a UK telecom giant. The reasoning behind this was a realisation that, although the auditors were highly skilled in their technical areas of budgetary control, risk assessment, process improvement, finance and computer audit, they did not have the capacity to create a great enough change in their clients within the business.

Sabotaging improvement

Instances of line managers deliberately confusing and deflecting the enquiries of their internal audit function led to a very poor acceptance rate of findings and reports, and even poorer installation of the required controls. We designed and installed an interpersonal skills programme to address these issues and within three years all 240 staff and others had attended and used the strategies and methodologies daily in their audit work.

The results achieved were significant and the confidence and assertive nature of the internal audit division was significantly enhanced. This was later extended to other parts of the Telecom’s business including inventory control and, later, purchasing.

We have designed and run similar programmes in America, Canada and Europe for engineering companies. We worked with many hundreds of manufacturing engineers over a seven year period to improve their change management skills to ensure they had complementary skills to deal with challenging operations and plant managers all over the world. Working with financial services companies it is relatively easy to take their accounts, IT, audit and risk and governance, internal consultants and project managers up the same learning curve and complement their skill base.

Content and process of soft skills

Interaction, practice and rehearsal are fundamental to any process for interpersonal improvement. We combine this with especially designed role plays and exercise which are focused entirely on real business in the organisation. No synthetic role plays or hypothetical scenarios. Every activity must reflect the challenges and issues that they face everyday and which will challenge their role in the future. Those designing the materials and process must be a blend of operational managers from the business and a listening behavioural consultant with the credibility to deliver. This is to be treated as a premier league process. After all, this is about leading change!
Leadership & Interpersonal Influence

Without leadership there is no change. The best in persuasive techniques, negotiation, influence strategies and psychometrics are central to this process. It is a cycle of learn, rehearse, practice, reflect. It will come as no surprise that those who drive change probably project much more of a ‘transformational’ style than their less visible ‘transactional’ types who prefer to focus on short-term managerial and administrative style. We believe that those who are transformational in nature probably are quite independent and will challenge the status quo and look for new ways of working.

Personal traits are definitely instrumental in shaping change projects. A slow moving mechanical style that focuses on analysing and measuring everything never achieves a great deal and even if they do, they do so in spite of failing to provide a lead to their team.

We utilise personality profiles to examine the variety of styles that can be successful in bringing about change. Our particular model is based on the active transformational style of manager who spends a great deal of her or his time challenging the way things are done. There is always a better way or a cheaper way or simply another way to reduce cycle times and unnecessary inspection and micro-management. Transformers have something about their personality that inspires and enthuse people to greater achievements.

Boss watching

Remember, everyone is a boss watcher. If you are in a position of authority, people will be looking for your verbal and non verbal cues and triggers – so it might be a good idea to understand what sort of behaviours you send out to the world. We all have good days and bad days, but its better to deliberately invest in new behaviours and that means ‘enabling your team to act’. Through extensive L&D you can harvest big and long lasting results.

In our workshops we use a variety of models for reflecting on our styles and how we impact others. I prefer a Jungian profile not dissimilar to Myers Briggs – we use them interchangeably and from the various types we distil these down to four ‘pure types’ regulator, visionary, facilitator and analyst. By understanding how to deal with them, one is much more confident and can practise new behaviours. Managers have a much better grasp of things if they can focus on broad ‘types’ rather than trying to follow every nuance of specific types. Our development is focused on how people move through different ‘personality stances’ depending on the prevailing challenges and pressures during their day. We argue strongly that no one type is perfect or ideal, but being able to be flexible and adapt

With practice one can swiftly identify the objections that others have to your proposals in advance of them raising them
Being able to be flexible and adapt to the circumstances is the key to influencing others. With practice one can swiftly identify the objections that others have to your proposals in advance of their raising them.

**Typical content of workshops**
- Your personal authenticity and developing a win-win attitude at all times
- Understanding the process of influence and setting a ‘yes’ frame
- Building rapport with your sponsors and those who don’t like the change
- Understanding resistance to change and turning it to acceptance
- Utilising benefits and features to a win-win advantage
- Utilising seven assertive techniques to make your point
- Practising listening skills
- Focusing on the gentle use of power and influence
- Becoming a confident negotiator and using higher authority
- Dealing with giving bad news
- De-escalation of conflict – bringing things back from the edge
- Quickly respond using solution-based questioning
- Using conversational psychometrics and Jungian analysis of personality
- Handling personality objections
- Identifying motivational drivers in others
- Using the four quadrant personality tool
- Analysing conscious and unconscious behaviour
- Developing your self confidence and self esteem
- Learning how to use six influencing strategies

**Summary: Until behaviour changes, nothing changes**
Organisations can devote resource to methodologies to bring about change but the real changes start to take place when organisations develop their internal capability to drive improvement. This comes about by seriously tackling the soft skill shortage experienced, and the unwillingness to lead and challenge the way things are done.

Organisations require more of their technical experts to consolidate their technical and functional mastery, and build an arsenal of tools and techniques around them to lead to significant behavioural change and organisational improvement for the new business models we must grasp in all sectors. Focus needs to be on designing the process around the current and future challenges, and be tailored specifically to the organisation. Progress should be mapped, and the change coached through an intensive post workshop process that ensures their behaviours are installed and hard wired for use in leading and mastering the process of change. The time is ripe for any organisation to develop their line managers and technical experts into a formidable force.
Time for change

Business process re-engineering – some enabling diagnostics, part II by Dr John Chamberlin.

Readiness and radicalness

*Combinable things hitherto un-combined* (Poe, 1845).

The important point here is that considerable research has already been completed over the decade and a half since BPR first emerged. Yet, for example, there is little (possibly no) evidence of these two devices being used in real organisational situations – both of which offer considerable potential for improving the success rates of organisational re-engineering (or constraining ambition).

Personal development plans (PDP) are commonplace, so is not the concept of an organisational readiness plan (ORP) equally valid? It is suggested that this is what the Hammer and Stanton, and Kettinger et al diagnostic exercises offer. On the one hand, the fact that since their publication in 1995 and 1997, there appears to be no evidence of their widespread use is unfortunate. On the other hand, they offer now a clear opportunity to research their application within UK LGOs and other public sector organisations, as their largely traditional cultures wrestle with the increasing need to deliver radical change and reduce costs. As Sir Peter Gershon said, just cutting services is not acceptable, they need to be re-engineered!

A combined self-diagnostic instrument

A range of combined developmental options were considered, based on Hayes’ (2007) three dimensional models to aid choice(s) of interventions, until a more useful representation emerged. The three-dimensional, or stepped model (see next page), combines the three components of Hammer and Stanton’s diagnostic on organisational readiness, with Kettinger et al’s Project Radicalness Planning Worksheet (PRPW). Suggested new descriptors for each readiness level are also offered...
at each step of that combined self-diagnostic instrument (see Figure 2).

The immediate visual implication in this representation is that there are steps upwards, showing an organisation’s potential to progress through the three levels of overall organisational readiness – and independently within each separate component of that – towards being better prepared to attempt change projects of increasing degrees of radicalness, through to full-scale, organisation-wide, radical re-engineering.

From a LGO policy-maker’s perspective, the willingness to consider the Hammer and Stanton self-diagnosis exercise would suggest at least some realistic intention to reflect upon the appropriateness of its current leadership, the readiness of the organisation as a whole, and its expertise in the area of re-engineering implementation, prior to making any sort of commitment to change of a more radical nature.

Equally, but perhaps from a practitioner’s (local manager’s) perspective, when potentially radical change projects are being initiated – ie, at project identification stage – use of Kettinger et al’s worksheet (PRPW) to assess a proposed project’s level of ambition would enable operations managers (process owners) to engage in more rational and structured discussions with their local policy-makers, in order to consider any possible mismatch that might have been exposed. It is important to note that external facilitation could be required at this stage.

**Policy and practice**

**National level**

It is accepted that a study of just two LGOs – however in-depth – will not provide robustly generalisable conclusions. However, if the new Coalition Government had continued with its predecessors’ top-down imposition of policy, supported (enforced?) by a robust inspection regime, then it would have needed to acknowledge the effect that this has at local government (LGO) level. In such an environment of organisational retrenchment, Keen and Scase (1998) suggested that:

‘The manager’s degree of freedom to manage within the framework of performance outcome targets and criteria can become constrained by increased levels of action planning and control over work processes as well as over outputs.’

In discussing the new managerialist model of the 1980s and 1990s, they stated that: ‘Differences between local government and the private sector are disappearing in the sense that managing, for example, a social services department is basically the same as running a company’ (ibid).

The evidence of this research is that those
differences still abound, the managers’ (chief executives down…) freedom to manage is still highly restricted and constrained, and the targets regime is still dominant, yet the recent announcement that the Audit Commission is to be scrapped on the bonfire of the quangos has to be good news.

On the basis of this study at least, if Gershon’s recommendations to bring more private sector practices into the public sector is to stand a greater chance of success – at least within LGOs – then seeing the Coalition Government acknowledging the restricting effect that these regimes have had can only be encouraging. Evidence-based policy has been a mantra, yet policy-based evidence has, in many cases, been the norm, with spurious examples of evidence being sought and used to support the imposition of idealistic (but not systems-based) policies in attempts to prove their so-called initiatives are working.

The achievement of Excellent/4-Star status was supposed to result in a reduced regime of inspection for the council so awarded, yet in ‘City C’ (8000 FTE), they say this has certainly not been the case. Keen and Scase again: ‘…many local authorities are reluctant to reduce their reliance on detailed and centralised control systems for reasons associated with senior managers’ fears of losing power as well as because of public accountability requirements’ (ibid).

These are serious cultural and managerial issues if radical change and the commensurate freedom to innovate are to progress and thrive at LGO level. Such fears need to be removed and recruitment and reward systems reviewed if senior LGO...
Differences between local government and the private sector are disappearing in the sense that managing, for example, a social services department, is basically the same as running a company. Leaders are to be encouraged to adopt, and be comfortable with, more radical approaches to change; otherwise: ‘the scope of local authority middle managers’ innovative activities is likely to be restricted to incremental, as opposed to radical, innovations within a framework of clear corporate policies and rigorous control systems’ (ibid).

Local level
Arguments over approaches to corporate strategy – planning vs emergent – have raged for at least two decades (Ansoff, 1991; Mintzberg, 1991), but LGOs have little choice; they are required to ‘plan’. City C, for example, were criticised in their 2001 comprehensive performance assessment (CPA) for their lack of strategic planning. Recent training on how to create business plans, and ‘Prince 2’ project management methodology, provide two examples of where they have tried to correct this. Both of the two LGOs studied already – and therefore, one might assume, possibly others too – have a surfeit of un- or under-used tools and techniques at their disposal. All they need to do is use them. Pringle, rather than Prince, might help this: ‘Projects in genuinely liberated environments!’

The point here is redolent of Papert and Harel’s (1991) constructionism, or learning by making – in this case, ultimately, piloting new processes. The very nature of BPR’s high-risk and high-uncertainty means that the depth of planning should be limited to the minimum necessary to get started, and thereafter enter into an iterative process of learning by doing; what Papert (1980) likened to being ‘as natural as learning French while living in France.’ Hammer and Champy’s original (1993; or updated 2001) text already provides sufficient guidance to any CEO/chief executive wishing to do this, and so do many others.

To unready or risk-averse organisations (LGOs, in this case), whilst Hammer and Champy (1993) state that business re-engineering means starting over and the alternative view (Stoddart & Jarvenpaa; 1995) was that a ‘Hammer-like ‘clean slate’ BPR was not typically practised,’ there is no Tayloristic one best way. What LGOs across the UK are therefore advised to do is begin to utilise more meaningfully what already exists; and in this case, the diagnostic exercises to do with their own organisational readiness and assessing the advisability of their ambition, or project radicalness.

Implications
This research is limited by its focus on just two LGOs, but whilst therefore not generalisable, there are clearly implications for other LGOs in a similar situation, in terms of their readiness for more radical change initiatives. Further research to test both of these questions sets within the two collaborating LGOs has been discussed, but doing this elsewhere would also add to the knowledge gained thus far. Both LGOs expressed an interest in utilising the outputs of this research as they progress their change management strategies. However, further research across a broader spectrum of UK or other countries’ public sector organisations could provide greater validation (or otherwise) of the Hammer and Stanton (1995) and Kettinger et al (1997) self-assessment diagnostic exercises, where none currently exists. If the outcomes of such an exercise were positive, in terms of the concepts’ potential for use, the implications for strategic leadership within these organisations would be very important and have far-reaching consequences. That alone should justify the exercise.

Combining these hitherto un-combined things with the combined self-diagnostic instrument shown earlier, would enable these LGOs to step up to the BPR plate and deliver dramatic results.

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About the author
Dr John Chamberlin (65) is a senior lecturer and pracademic at the Derbyshire Business School (DBS), within the Faculty of Business, Computing & Law (BC&L) at the University of Derby (UoD). After 34 years in the telecommunications industry (BT), the last decade of which saw him as a senior manager with a large external workforce and commensurate budget covering the East Midlands, John took early retirement in 1996, but within a year of this he had signed on for a full-time MBA at UoD. Coming out with one of only two Distinctions, and the only ‘Masters’ Level prize for outstanding performance’ that year, John then became a part-time lecturer within DBS.

Early in 2005 he again reverted to being a full-time student, to embark upon a PhD studying the implementation of business process re-engineering (BPR) within two local authorities, completing this in December 2008. The confidential nature of, and ramifications from, this study, have meant that its outputs are being published in various stages, via conferences and journals.

John is a founder member of ‘Sytoc’, the Derbyshire Business School’s ‘Systems Thinking & Organisational Change Research Group’, organised by Gino Franco, and led by Dr David Longbottom. John’s primary academic interests are in management, leadership, change, the public sector, BPR, and systems thinking.

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Three graduates have been celebrating international success in their latest examinations, the IMS certificate course. Scott-Grant Training is pleased to announce the following results for all delegates studying with the company during 2010 for the certificate.

Student of the Year 2010 is Steven Moody who works as a wage planning analyst with Asda Limited in Leeds; his was the best overall performance in 2010. Scott-Grant’s Managing Director Richard Taylor was very impressed: “This is no mean achievement. People from many parts of the world and across many business sectors have studied with Scott-Grant during the year.”

To celebrate his success, Steven was invited back to Scott-Grant’s head office and training centre in Manchester along with his delighted manager, Craig Hamilton; “I am very proud of him. This is a fantastic achievement,” he beamed.

Steven first joined Asda in Merseyside as a 16 year old working in the store, then went to study Economics at University. After graduating he returned to Asda working in various store management roles before joining the wage planning department in 2009. “I can really relate the content of the IMS certificate course to my work. The practical knowledge I’ve gained has given me a much better understanding; it was so wide ranging and is an ideal qualification”, he said.

Tying for a very close second place were delegates from automotive manufacturer Nissan Ltd in Sunderland and Waitrose Limited in Bracknell. Glenn Pallan is a graduate engineer from Newcastle upon Tyne who is working full time at Nissan as part of his Master’s degree. Having graduated in Astrophysics, he joined Nissan’s industrial engineering department on a two year project and is delighted to have studied for this professional qualification. “It’s all about applying problem solving skills and the new knowledge I have acquired at Scott-Grant means that I can really help with the intricacies of line balancing, for example.”

Jonathan Carthew, a trainee analyst from Waitrose Limited, part of the John Lewis Partnership, graduated in industrial economics in 2008. He began as part of their store graduate scheme then joined the productivity systems department. Jon felt the IMS certificate course was particularly useful as an extension of his degree studies: “my degree course was more conceptual, whereas this course was full of practical techniques that have a real value to any business.” He appreciated why Waitrose encourage all their employees in the productivity systems department to obtain this professional qualification. Productivity systems manager, Jon Ward was there to support and celebrate with Jonathan in Manchester.

Asda and Waitrose are no strangers to celebrating IMS certificate success with Scott-Grant, sharing both first and second places on several occasions in the last few years.

Student of the Year Steven was awarded life membership of the Institute from IMS Chairman David Blanchflower and was presented with a certificate from both the Institute and Scott-Grant. Certificates and gifts were also given to runners-up Glenn and Jonathan by Mike Seaman, Scott-Grant’s training and technical director. Mike observed that ”many who come to us for training are wanting to be equipped with the practical tools and techniques for the future and that’s what we can provide. We’ve had a tremendous year again training people...
in countries such as Sweden, France, Italy, Belgium and Spain, in many parts of Africa including Morocco, Kenya, Nigeria, Liberia, Ghana and South Africa. We’ve also worked further afield in Slovakia, Hungary, Romania, the Czech Republic and Poland across to China, Korea, Thailand and Russia, Australia, Canada and the USA. We’ve helped people from a wide range of business sectors and presented courses in three languages.

“As our three top delegates here prove, we’re seeing many people from higher education wanting to study with us for the IMS certificate because the practical application of the content of what we teach has an immediate value to their business.

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Productivity experts advise for BBC programme

A production company commissioned by the BBC has been involving Scott-Grant. Real Life Media contacted the Manchester head office of productivity experts Scott-Grant when they started to look at the work of Frank and Lillian Gilbreth for the BBC’s The One Programme. Presenter John Sergeant explains the history of time and motion and its application in today’s industry and home life – with help from Mike Seaman, Scott-Grant’s technical director.

If you’d like to know more about how time and motion is perceived today, contact Scott-Grant for a free guide. Simply email productivity@scott-grant.co.uk or ring +44 (0)161 234 2121.

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To All Corporate Members

Elections to Council of Management

At the Annual General Meeting to be held on Friday 21 October 2011 the following members of the Institute’s Council of Management will retire. They are, however, all eligible for re-election:

Julian Cutler                 David Blanchflower                 Rory Graham                 Richard Bridges

Nominations for the vacancies so caused may be made by submission to me at the Institute’s Head Office, Brooke House, 24 Dam Street, Lichfield, Staffordshire WS13 6AA not later than 5pm on Saturday 9 April 2011 on the form overleaf. Will you please note that the nominee must be a corporate member of the Institute and be nominated by two other corporate members. Nominees must sign the undertaking to accept office if elected and provide details of themselves which may appear on the ballot paper.

In the event of the number of nominations exceeding the number of vacancies, ballot papers will be despatched to all corporate members on Monday 6 June 2011. The closing date for receipt of voting papers will be 4 July 2011 and the results of the election will be declared at the Annual General Meeting on Friday 21 October 2011.

The nomination form overleaf may be photocopied to avoid damaging your journal. An acknowledgement will be sent to the nominees as soon as the form is received.

The following notes outline the general duties and responsibilities of a Council member:

The Institute is a company limited by guarantee and is governed by the provisions of the Companies Acts. Its Memorandum and Articles of Association specify what it may do and how it should conduct its affairs. The business of the Institute is managed by the Council of Management who may do anything within the Memorandum and Articles of Association which is not contrary to any statute or is not required to be done by members in general meeting. This responsibility is a collective one and Council normally act through Council meetings. Council may of course delegate to committees or individuals but it has the final responsibility.

Council members are in a fiduciary relationship to the Institute and must exercise their powers for its benefit using reasonable diligence and care. They are required to take proper account of the interests of the Institute’s employees, as well as its members. They act as agents of the Institute and only become personally liable if they authorise any act or expenditure outside the Constitution. They may not receive any remuneration or benefit as Council members except out of pocket expenses; this includes benefit of any contract with the Institute by a company of which they own 100th of the share capital or more.

Apart from presenting annual reports and accounts and appointing certain officers, the Memorandum and Articles of Association lay no specific duties on the Council. Its responsibility is a general one of running the affairs of the business. Any individual responsibility springs from authority given by the Council and this will clearly vary from time to time. Council members are expected to serve a four year term of office and to attend all Council meetings (normally two or three each year). To be a member of at least one committee (meeting three or four times a year) and to represent Council at region, or specialist group meetings if called upon to do so.

John Lucey
Secretary

Note: Candidates must enclose a good quality photograph of themselves and up to 50 words indicating why they wish to be elected to Council. This, together with the photo, will be published in the Summer Journal. Candidates must also let me have a maximum of 150 words giving details of their industrial/public service/professional experience relating to Management Services and/or past service to the Institute which will appear on the ballot form. If necessary, please add an additional sheet to accommodate your details.
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**Current office(s) in the Institute**

**Why I wish to be elected to Council (50 words max.)**

_________________________________________________________________________________________________________________________
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**Industrial/Public Service/Professional experience relating to Management Services and/or service to the Institute (150 words max.)**

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**I hereby agree to serve on Council should I be elected thereto. The details given about Myself are true and correct in all respects**

Signature:  
Date:  

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The staging of the 21st annual World Congress on Total Quality in early 2011 represents an opportunity to reflect on developments since the first event was held, and to question whether quality is still relevant. Since 1990 there has been a great increase in the number of people and organisations offering solutions to management challenges and ways of improving performance. Quality exists in a crowded market.

Today many voices clamour for attention. Taking early retirement and setting oneself up as a consultant, adviser, coach, author and/or speaker in whatever topics are fashionable at the time is now almost a career option. There can be thousands, and in some cases tens of thousands of books, on a popular subject such as leadership.

When so many people claim to be able to raise our game, or help us to tackle the latest issues, leaders of organisations sometimes find it difficult to decide to whom to turn for advice. Companies struggle to distinguish one hyped offering from another. Chief executive officers (CEOs) are protected from those peddling the latest panaceas by personal assistants who jealously guard access to the executive suite.

People strive to be associated with whatever is thought to be “current”. Brochures and websites are rewritten to claim expertise in the latest ‘kid on the block’ fad or concern. Governance is an example. Experts on corporate governance now seem to outnumber FTSE 100 boards. Yet despite their guidance and codes, bank failures and bailouts have constituted arguably the most dramatic failure of corporate governance in history. Board and risk management processes have been found wanting.

**Early criticisms of quality**

At the initial world congress total quality had its critics. Aspects of it needed to be re-assessed if it was to counter its detractors and remain vital. For example, quality standards were considered bureaucratic (Small Business Research Trust, 1992), and not a good place to start (Binney, 1992). One survey suggested that quality standards had neither captured imaginations nor produced outstanding results over a 15 year period (Seddon, 1994), while another found quality programmes were running out of steam and lacked management support (Voss and Cruise O’Brien, 1992).

Quality professionals themselves were questioning the vague and unfocused use of the term quality. For example, John Nicholls (1990) suggested use of the phrase ‘value to the Customer’ or VTC in place of ‘customer driven TQM’. While governance was a little used word, the
Still Relevant?
solutions to classic dilemmas

importance of boards and excellence in the boardroom was recognised (Cadbury, 1990; Coulson-Thomas, 1993).

The quality of corporate direction was an issue in the late 1980s in the sense that many boards were finding it difficult to implement their visions and ensure compliance with their policies (Coulson-Thomas, 1992b & c). People in the front line were not always equipped with the processes and tools to do what was expected of them.

The need for a new direction

A 1990 BIM report concluded that as customers increasingly assumed quality, they might no longer distinguish between alternative suppliers, while “in markets in which all suppliers have their quality programmes, managers need to consider what lies beyond quality” (Coulson-Thomas and Brown, 1990). At stake when the first World Congress on Total Quality was held was whether quality would adapt, be complemented by other approaches, or replaced by a better alternative.

We needed to look beyond traditional quality at the quality of management. Less tangible areas such as the quality of attitudes, values, perceptions and relationships had become more significant (Coulson-Thomas and Brown, 1990; Coulson-Thomas and Coulson-Thomas, 1991). Ways had to be found of offering greater variety and tailored responses to individual customers, while at the same time preserving quality.

In the UK, people used to come of age at 21 and cross a perceived threshold to adult status and responsibility. Much has changed since 1990. Other complementary approaches have been widely adopted such as BPR/ BPM, business excellence and corporate and business transformation (Coulson-Thomas, 1994 & 1997). After 21 world congresses on total quality is the quality message still of value today? Are concerns articulated a generation ago still current, and how can they be addressed?

Continuing relevance of quality principles

Today attention spans can be short. When people are too busy to think and eager to try something new, quality may appear passé. Yet for those who reflect it continues to be relevant. For example, the quality of relationships with internal and external stakeholders is vital. Where stakeholders have choices, such as in terms of where to work, supply, consume or invest, such relationships must be mutually beneficial and rewarding if they are to develop and last.

Quality of management is of direct relevance to contemporary concerns with, for example, sustainability and climate change. The effective use of inputs can lead to less pressure upon scarce resources. Processes that are more efficient can lead to fewer and less harmful emissions. Visit an early generation plant or process,

Where customers want to behave responsibly and wish to do the right thing support tools that increase their understanding of the outcomes of different courses of action can both satisfy their concerns and confer competitive advantage
At the initial world congress total quality had its critics. Aspects of it needed to be reassessed if it was to counter its detractors and remain vital.

in locations such as Russia, Brazil or the rust belt of the US, and what one encounters is sometimes relatively simple, crude and inefficient compared with modern equivalents.

Opponents of cars stress their adverse environmental impact. Yet imagine the environmental consequences of an equivalent number of people travelling by coal fired steam vehicles or horse drawn transport. In the face of challenges such as global warming, terrorism and the threat of pandemics, quality of imagination and thinking continues to be important. Successive innovations can have a beneficial impact.

Within the public sector if anything, quality is more important today than it was when the first world congress on total quality was held. In his opening address to a recent conference Lord Butler (2010), a former head of the UK civil service, identified the establishment of expected levels of service and the provision of support tailored to the needs of individual citizens as fundamental trends during his career. Delivering high quality services against a background of rising expectations remains a challenge.

Consumer expectations and board concerns

Customers continue to become ever more demanding. They and public service users increasingly desire individually tailored products and services. Many of them want to stand out and feel that what they are acquiring is distinctive, if not special or unique.

In the aftermath of various corporate scandals, and the failures and bailouts of financial institutions, the good standing of an organisation, or quality of reputation, continues to be a priority.

When buying from an online source over the Internet customers seek to purchase from organisations they feel they can trust.

Corporate reputation and brand image can both be compromised by poor quality. Similarly, consistency and driving errors out of what people do, particularly those in direct contact with customers, clients and citizens, can enhance an image and standing, and help to justify a price premium.

When companies get it wrong they often now find there are fewer places to hide. Because the media, and other interested parties, can reach larger audiences more quickly companies are keener than ever to avoid risks. Yet quality procedures and the requirements for retaining a quality kitemark can still be a costly and bureaucratic burden. We need cost effective ways of ensuring consistency and compliance.

Transformation, governance and compliance

Transformation, governance, risk management and compliance are high on contemporary corporate agendas. Quality of processes in these areas, and the delivery of beneficial outputs, is an issue for directors, investors and other stakeholders. Traditional quality considerations such as relevance and fitness for purpose still appear to be appropriate.

In relation to governance, ethics and social responsibility are codes of practice and statements of corporate values fit for purpose? Are they just pious statements and words on paper? Do they affect behaviour? How are policies in these and other areas implemented? How can board aspirations be translated into concrete achievements?

In particular, how can front line staff doing difficult jobs be helped to get it right and to do the right thing every time when responding to individual requirements? There are cost-effective ways of doing this internationally across large organisations, while also generating compliance and assurance information (Coulson-Thomas, 2007).

Changing quality priorities

Early or traditional quality sought to reduce variation through standard offerings and prescribed processes. Statistical tools were used to increase the quality of physical products. In relation to services, feelings and values have become more important.

Retreating into a world of norms and standards can lead rapidly to low margin commodity supplier status (Coulson-Thomas, 1997). Increasingly, quality needs to be built into the daily tools that people use to craft bespoke offerings. Ways need to be found of boosting productivity, preserving quality and ensuring compliance while allowing faster, more flexible and tailored responses.

Many directors and managers feel trapped on the horns of a dilemma. People for whom they are responsible may require the discretion to respond to individual requirements if they are to create new options and choices. Yet customers retain high expectations of quality and will punish a supplier for any slipping of standards. There is a need to delegate and empower whilst still maintaining quality control.

Diversity and compliance

Given the growing need for bespoke responses,
organisations are finding it difficult to get it right first time in changing and novel situations. The time it takes to put separate quality checks in place to cope with each new requirement means that approaches adopted may lag behind an evolving need. The variety demanded by customers has to be reconciled with the requirement to also keep a grip on quality. People worry about the risk of compromising quality when bespoking responses. Quality procedures may cover standard products, and a restricted set of responses, but may not cover departure from standard procedures, ie tailored offerings. Reviewing each case can incur costs and result in delays.

In many situations the expense of applying a bureaucratic approach to quality to a growing number of variations from the norm would be prohibitive. Maintaining traditional and stand alone quality alongside a greater burden of work, diversity and pressure to perform becomes ever more problematic.

Partner quality and compliance
Product proliferation, extra channels to market, globalisation and innovation create new risks that require additional responses. The sheer quantity of quality procedures and standards makes it increasingly difficult to keep people up to date with quality documentation, especially those working in the field and up and down a supply chain.

Too often quality stops at the boundary of an organisation and does not extend to business partners. It may now need to embrace the activities of people who directly influence a reputation and the quality of what is delivered to customers, yet over whom one has little direct control. How does one ensure consistency and compliance across different organisations?

Anticipation and prevention is preferable to reaction to quality problems. Too often quality is a self-contained activity rather than an integral part of how work is done. We need to ensure quality considerations are properly addressed as and when risks arise. Quality must become an automatic and integral element of a bespoke response.

**The performance tool solution**
One solution is to use performance or job support tools to increase workgroup productivity and corporate performance, by making it easier for people to do difficult jobs. Devices such as traffic lighting can be used to prevent people from progressing along a course of action if data entered is incomplete or suggests a possible risk.

Building quality into ways of working and performance support tools ensures control is still exercised in delegated situations (Coulson-Thomas, 2007). Responses are based upon core principles such as forcing a focus on customer requirements and stopping errors happening in the first place. Friends Provident has used a support tool to enable independent financial advisers to produce bespoke and compliant sales literature and advertisements (see Figure 1).

Importantly, support tools can be used to capture and disseminate best practice. Within most workgroups there are superstars and the essence of their success can now be expressed in better ways.
Quality of doing things for others (Coulson-Thomas, 2007). At the time of the first World Congress on Total Quality while the importance of learning from high performers was recognised (Camp, 1989), there was less awareness of how the differing approaches of superstars could be cost effectively captured and shared.

The automation of more routine and repetitive tasks can significantly improve productivity and allow more time for activities such as differentiation and tailoring. Decision trees can be included to help ensure all aspects are considered. Performance support tools can be made tamperproof, which significantly reduces risks to quality.

Learning support can also be provided to improve the general level of appreciation of important issues affecting performance, quality, relevant policies and other considerations. Tools can be programmed to prevent outputs that conflict with laws, rules, regulations, guidelines or ethical and other codes. Self-assessment diagnostics can also be included which can identify development and updating requirements.

**Changing behaviour at the coal face**
Board demands should be matched with practical steps to help people in demanding front line roles make necessary changes. People quickly adopt tools and approaches that make their life easier. Putting a performance support tool onto a laptop or mobile phone can liberate people and free them from particular locations. Quality is taken out of the office and put into the hands of people in the field and in partner organisations. Higher level work can be moved offshore or outsourced.

Such tools can increase understanding and make relevant support accessible over a corporate intranet or extranet, and internationally, whenever required.

Different language versions can be produced, providing a more cost effective and quicker route to global operation than earlier approaches (Coulson-Thomas, 1992a & 2007). Guidance relevant to a particular situation and context can also be provided.

Tools can help customers make socially responsible choices, for example by making them aware of the environmental impacts of purchase decisions (Coulson-Thomas, 2009). Nomix has used a tool to explain the advantages of its approach (See Figure 2). When alternative implications are clearly presented many customers make up their minds and select the least damaging options. They buy, thus answering Albert Carr’s (1970) question of whether a corporate conscience can be afforded.

Friedman (1962) has argued that a board best discharges its social responsibility by ensuring a company satisfies its customers in voluntary exchanges in the marketplace. Where customers want to behave responsibly and wish to do the right thing support tools that increase their understanding of the outcomes of different courses of action can both satisfy their concerns and confer competitive advantage.

Support tools can provide the straight dealing and completeness Cadbury (1990) associates with integrity, the essence of quality in our

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Figure 2: A Nomix support tool explains the environmental benefits of its weed control solutions
relationships with others. They can also deliver multiple benefits in the public sector when used, for example, to transform healthcare in a context in which demand is rising, resources may be constrained, and quality and patient safety are paramount (Coulson-Thomas, 2010).

Benefits of performance support
Equipping workgroups with performance support tools offers various advantages over traditional approaches to quality and compliance. Building in quality makes it possible to give more discretion to people whilst maintaining control. Organisations benefit from lower overheads, a reduced cost of errors and faster adoption of change.

Users like Dana find multimedia facilities create the ability to show and demonstrate things without needing the presence of an experienced person (See Figure 3). This reduces the cost of delivering new programmes and launching new products. Use of a tool ensures a consistent approach across all personnel and locations. People find it much quicker to locate the information that they need.

By encouraging or forcing particular routes and preventing others, tools can have direct impact on behaviour. They can provide easy paths through material and incorporate quality and other checks. When situations and circumstances change tools can be quickly updated in ways that allow new or changed material to be identified.

Companies such as Cisco Systems have achieved large returns on investment by using performance support tools to boost productivity, speed up bespoke responses, ensure compliance, cut costs, reduce stress and improve quality (Coulson-Thomas, 2007). The approach has matured and is well tested in various sectors, including finance, manufacturing, IT, telecoms, professional services, printing and packaging, and retail.

Lessons from pioneers of performance support
If quality is to remain relevant and vital it should be built into support tools and the day-to-day work process, rather than having it as a separate stand-alone add-on. By automating tasks and building quality gates in, errors can be designed out of key corporate activities, and consequently significant savings are made. More transparent and mutually beneficial relationships rooted in shared understanding can be forged.

Performance support tools build confidence and understanding (See Figure 4) and are easy to disseminate to business partners in multiple locations. Support needs to be current, and this can be ensured by automatic updating when users are online. People can be helped to competently deal with change. Building checks into tools helps to ensure that quality and compliance are not perceived as a burden.

Those considering whether or not to provide certain workgroups with performance support tools should seek a demonstration of actual applications to make people aware of what is possible. A workshop can then be held to examine the applicability of the suggested approach to the particular organisation and context. The scoping of the format and content of the support provided can then follow this.

Conclusion
Many past concerns about a gulf between board
aspiration and corporate reality can now be addressed. Expensive and bureaucratic approaches are no longer necessary. Much more practical and cost effective ways of boosting performance, and ensuring compliance, quality relationships and quality behaviours now exist. They are ripe and ready for wider adoption. Quality has come of age, and could have a promising future.

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Further information
The performance support tools illustrated in this article were developed by Cotoco (www.cotoco.com). Further examples of support tools are given in Winning Companies; Winning People by Colin Coulson-Thomas which can be obtained from www.policypublications.com

Author
Professor Colin Coulson-Thomas FMS, an experienced consultant and board chairman, led the EU COBRA re-engineering project and undertook the surveys for the Beyond Quality and Quality: The Next Steps reports. His 40 books and reports include The Knowledge Entrepreneur, Developing Directors and Winning Companies; Winning People. Colin has been process vision holder of major transformation projects; helped over 100 organisations to improve director, board and corporate performance; and spoken at over 200 national and international events in over 40 countries. He has held professorial appointments in Europe, North and South America, the Middle East, India and China, and is a member of the business school team at the University of Greenwich. He can be contacted via www.coulson-thomas.com and his latest publications obtained from www.policypublications.com.
Each year approximately 100 British citizens are awarded a Travelling Fellowship from the Winston Churchill Memorial Trust, the aim of which is to provide a unique opportunity for British citizens to go abroad on a personal project, with the objective of enriching their own lives and those of their communities.

Opportunity of a lifetime

Would you like the opportunity to travel abroad and broaden your life experience, while studying whatever you are passionate about? Does it sound too good to be true? It’s not. Each year up to 100 people are awarded a Winston Churchill Travelling Fellowship that promises exactly that. The Fellowships are available to people of any age, gender, ethnicity or religion, with or without educational qualifications, and in any occupation or none. Past award winners include nurses, artists, scientists, engineers, farmers, managers, carers, craft workers, artisans, members of the emergency services, sportsmen and women, and young people. Since 1966, around 4450 Fellowships have been awarded.

The Trust says: “Our objective for the Travelling Fellowships is to provide opportunities for British citizens to go abroad on a worthwhile enterprise of their own choosing, with the aim of enriching their lives by their wider experience – through the knowledge, understanding, and/or skills they gain – and, on their return, enhancing the life of their community by their example and the dissemination of the benefit of their travels.”

Absolutely anyone over 18 years old can apply as long as they have a project that meets the criteria of the Trust. Suitable projects which ‘bring real benefit to you as an individual and will enable you to bring positive benefit to your community of field of interest’ will be considered. And a great number of these enterprises may be unlikely to receive funding from other sources. Each project must involve travel overseas for between four and 12 weeks. No qualifications are required and each application is judged on the individual and the merit of the enterprise.

Gap year, post graduate or academic studies, courses and activities are not suitable for the Fellowships, unless real and wider benefits to others in the UK can be demonstrated; also those that benefit the individual exclusively are not usually approved.

Fellowships are awarded in individual categories. Your project should fall into one of the following categories. There is an open category for anyone with a project which does not fit one of the other categories.

- Arts, Crafts and Music: Including all aspects of performing, visual and fine arts;
- Business, Industry and Commerce: WCMT is especially interested in small business start-up projects;
- Citizen and Civil Society: Projects could include multi-cultural, care, community, inclusion and youth engagement issues, politics, and the 2012 Olympic legacy;
- Education and Training: Applications welcome from right across this field;
- Environment, Food and Rural Affairs: Those involved in the countryside and in food production, the environment, conservation and animal welfare;
- Exploration, Adventure and Sport: Including leaders of expeditions, but not team members;
- Medical, Health and Social Services: Anyone involved in this broad field including nursing, mental health, and
support to ex-servicemen;
• Professions and the Public Services: Those involved in all our public services including the emergency services, transport and the media;
• Science, Engineering, Technology and Communications: Applications will be welcome from across this wide spectrum;
• Open: For anyone with a worthwhile project that does not fit into the above areas.

Who can apply?
• British citizens (British Nationality Act 1981) who are resident in the UK.
• Anyone aged 18 and above on 31 December 2012.
• People with a passion for their subject who cannot resist sharing their passion and thus inspiring others.
• Existing Churchill Fellows may not re-apply.

Applications
Applications should have a well thought through project that clearly demonstrates some wider benefit to the community or field of interest, not just to the individual. Applicants should also explain how they are going to disseminate the results of the Fellowship so that the benefits reach the widest audience.

Applicants short-listed for interview will need to demonstrate that they have the motivation and drive to fulfil their plans to a high standard and that they possess a strong commitment to the chosen subject.

If you are successful you will have to plan the Fellowship’s travel within the limit of the awarded grant and according to guidelines provided by the Trust.

Once you have returned from your travels, you will have to write a report within six months of your homecoming detailing your Fellowship findings and conclusions and disseminate the results of your Fellowship widely, to ensure you achieve the maximum benefit. You will also be required to join and support your local Association of Churchill Fellows.

Applications for 2012 fellowships can be submitted in May 2011. Grants cover return and internal travel, daily living and insurance. For 2010 the average grant was £5600.

The Trust
The Winston Churchill Memorial Trust was established when Sir Winston Churchill died in 1965. Thousands of people, out of respect for the man and in gratitude for his inspired leadership, gave generously so that a living memorial to the great man could benefit future generations of British people.

This fund now supports 100 Travelling Fellowships and ten Bursaries at Churchill College Cambridge, each year based on the Trust’s charitable Object of: “The advancement and propagation of education in any part of the world for the benefit of British citizens of all walks of life in such an exclusively charitable manner that such education will make its recipients more effective in their life and work, whilst benefiting themselves and their communities, and ultimately the UK as a whole”.

As well as the Travelling Fellowships, the Trust also funds 10 undergraduate bursaries at Churchill College Cambridge, as well as an Archive By-Fellowship at the Churchill Archives Centre, each year.

What is the purpose of the Fellowships?
The Trust says: “To widen an individual’s experience in such a way that he or she grows in confidence, knowledge, authority and ambition. To bring benefit to others in the UK by sharing the results of your experience. This is achieved through the inspiration provided by the individual’s example – his or her subsequent performance and achievements and the dissemination and application of new knowledge, different perspectives and innovative solutions.”

For full details and how to apply as well as register to receive an email in May visit www.wcmt.org.uk.

Current Travelling Fellows include
Kate Hathway
Effective community involvement in renewable energy partnerships
Richard Dennis
Solar powered generation linked by wireless technology
Anthony Cowan
Development of the UK Civil Air Patrol
Linsay Chalmers
Community Recycling Network for Scotland
Flemming Ulf-Hansen
Ecosystem-based management for habitat restoration
Jenny Pickerill
Affordable eco-homes
Melissa Shales
Steel safari – how railways built modern Africa
Monica Grose-Hodge
Monica Grose-Hodge is travelling in Spain to interview master craftsmen and understanding, people in all countries should be able to get to know one another and trust one another.
Case Study: John Lorriman

Background
Education and training of electronic technicians and technician engineers

The Fellowship
In 1985 John went to Japan for six weeks to study the Japanese approach to educating, training and managing engineers and technicians. Whilst there he met Professor Takashi Kenjo who went on to have a significant impact on his career.

The results
On his return to the UK, John’s report was publicised in a half page article in the careers section of the Daily Telegraph. This resulted in some 200 requests for copies and numerous presentations at a time when relatively little was known or understood about Japan.

At the time John was head of training for GEC Telecommunications and was able to implement a number of new ideas as a result of his Fellowship. In 1992 he left GEC and set up his own management consultancy business based around his Fellowship findings. His consultancy work has taken him to Hong Kong, China, the USA, Turkey and Japan, among others and provides an ongoing opportunity for him to apply the important lessons learnt during his Churchill Fellowship.

In 1994 Oxford University Press published a book Japan’s Winning Margins – Education, Training and Management which he co-authored with Professor Takashi Kenjo. This was subsequently translated into Chinese and published in Beijing by China’s Science Press in 2002.

Since then John has also co-authored Upside Down Management for McGraw-Hill and authored Continuing Professional Development – a practical approach for the Institution of Electrical Engineers (IEE).

In addition to his consultancy and writing he does a lot of work for the Institution of Engineering and Technology (IET – formerly the IEE) – the largest of the engineering institutions with over 150,000 members worldwide – around professional development accreditation, chartered engineer interviewing and mentoring. John initiated and piloted the IET’s mentoring scheme.

In 1999 he was asked to chair the first joint continuing professional development committee between the IET, the Institution of Mechanical Engineers and the Institution of Incorporated Engineers, with some 250,000 members worldwide. He was again able to use lessons from Japan to good effect in helping these institutions develop a joint CPD scheme based on Competences and focused learning.

John also believes he has been able to play a role in popularising the concept of mechatronics which was invented by his (now) old friend and colleague Professor Takashi Kenjo.

He feels that his Fellowship “…undoubtedly changed my life in a radical way.”
With the advent of life membership we are attracting new members. There are still people who are engaged in management services who are not members and we would like them to join the Institute.

We can use our ‘direct entry’ route to fast track this and information is available from Brooke House.

We very much hope that our existing members will make potential members aware of this option.

• Actively promoting the IMS in your place of work
• Encourage colleagues at work as well as professional and social contacts to join the Institute
• Refer potential new members to the Journal as an example of what the IMS is about
• Remind potential members of the benefits of IMS membership, eg, education system, regional structure, recognised professional qualification
• Up to the minute information via the IMS Journal and website professional support
• Undertaking contract/consultancy work

What Next?
Contact the IMS for an application form
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