

Day Trippers or Explorers? Starting the Business Excellence (BE) Journey in New Zealand Service Organisations

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ABSTRACT

Service organisations within New Zealand are adopting Business Excellence (BE) principles and practices to develop organisational capability and to improve organisational performance. Many of these organisations report that a key challenge is starting the improvement journey. In response to this challenge there are two purposes to this paper. The first is to describe the development of the Service Excellence Framework, a conceptual framework designed to represent how service organisations start the BE journey. Embedded within the framework are five guiding principles that reflect the theory underlying the Framework and five key elements, each of which is perceived to influence the start of the BE journey to some extent. It is proposed that when considered together, the principles and the key elements have the potential to guide practitioners as they facilitate the start of their BE journey. The second purpose of the paper is to describe how a large service organisation applied the Service Excellence Framework to guide the start of its BE journey.

INTRODUCTION

Service organisations are important to the New Zealand economy in that they currently contribute 68% to the gross domestic product (GDP) and have consistently contributed the most to economic growth since 2002 (Statistics New Zealand, 2005). In New Zealand, services are described by Statistics New Zealand (2000) as being all organisations that are not primary (e.g. agriculture, forestry, fishing and mining) or goods-producing organisations (e.g. manufacturing, electricity, gas or water). Two recent national business research projects, *Firm Foundations* (Knuckey, Johnston, Campbell-Hunt, Carlaw, Corbett & Massey, 2002) and *The Workplace Productivity Challenge* (Workplace Productivity Group, 2004) recommend that New Zealand organisations develop business capability (business practices), in order to improve organisational performance. Although both reports address the importance of service organisations to the New Zealand economy, gaps in our knowledge base remain. For example, the Firm Foundations report excludes some service organisations that contribute to GDP such as government administration, defence organisations and personal services;

the Workplace Productivity Challenge report does not differentiate service organisations from other types of organisation.

Business excellence (BE) is a business improvement practice that evolved from quality management. It has been shown to contribute to improved organisational performance in a range of service organisations internationally (Przasnyski & Tai, 1999; Singhal & Hendricks, 1999; Sirca, 2003) and in New Zealand (Corbett & Angell, 2004; NZBEF, 2004). Much of the current BE theory and practice relies not on BE research but rather on quality management research. This quality management research is often based on manufacturing and service samples, rather than differentiating for service organisations. In addition, current studies typically focus on mature organisations, such as BE award winners, rather than those organisations starting the improvement journey. The few studies that focus on the start of the journey in service organisations are typically single case study design (Jackson, 1999; McFarlane, 2001) and limit their analysis to describing the journey rather than examining the influences on the BE journey. These international trends are also evident in the New Zealand BE research which has focused on the use of BEFs (McCaul, 1997), progress of BE award winners (Corbett & Angell, 2004), self-assessment (Saunders & Mann, 2005) and benchmarking (Mann & Grigg, 2004; Mann & Welsh, 2001).

The focus of this paper is on *starting the journey* which is defined as “the transition period between decision to start and sustaining the journey” (adapted from Dawson & Palmer, 1995). Anecdotal evidence from New Zealand service organisations indicates that they find starting the improvement journey particularly challenging. A review of the BE literature identified limited attention is given to this phase of the journey. While the quality management literature offers frameworks to guide the start of the quality management journey (Boaden & Dale, 1993; Kanji & Wallace, 2000; Sureshchandar, Rajendran & Anantharaman, 2001) the research community is yet to develop a framework to guide the start of the BE journey in service organisations. A BE journey is defined by Innes (2005) as a business improvement journey that is guided by a BE framework. The Baldrige Criteria for Performance Excellence or the CPE (NZBEF, 2005) is a BEF, well known internationally and in New Zealand. The CPE is validated as a measurement tool for mature organisations (Evans & Ford, 1997; Pannirselvam & Ferguson, 2001) but its use as a guide for starting the journey is questioned and yet to be demonstrated (Dale, Zairi, van der Wiele & Williams, 2000; Oakland, 2005). Likewise there are frameworks influenced by the CPE and designed to measure performance in services (Robson & Prabhu, 2001; Voss, et al, 1997) but not designed to provide a guide for the start of the journey.

The above literature review highlights four key research needs: (1) the need to develop our understanding of how service organisations improve, (2) the need to develop the knowledge base for BE in services, (3) the need to develop our understanding of how service organisations in New Zealand start the BE journey, and finally (4) the need to develop a BEF to guide the start of the BE journey in service organisations.

The present paper goes some way towards addressing the above needs. There are two parts to the paper, in Part One we describe the development of the Service Excellence Framework, a conceptual

framework designed to represent how service organisations start the BE journey (Innes, 2005). Embedded within the framework are six guiding principles that reflect the theory underlying the Framework and five key elements, all of which are perceived to influence the start of the BE journey to some extent. It is proposed that when considered together, the principles and the key elements have the potential to guide practitioners as they facilitate the start of their BE journey. In Part Two, we describe how a large service organisation applied the Service Excellence Framework to guide the start of their BE journey.

PART ONE: THE SERVICE EXCELLENCE FRAMEWORK

In Part One of this paper, we describe the development of the Service Excellence Framework (Innes, 2005). The development process involved three distinct phases: Firstly, the researcher reviewed the literature to develop an initial conceptual framework. The second phase involved empirical research with New Zealand service organisations to further develop the framework. And finally, the key findings from this work were integrated to develop the current version of the Service Excellence Framework. Key findings for each phase are presented next.

Literature review

The purpose of the literature review was to synthesize and analyse existing knowledge relevant to the BE journey in order to distill key concepts, identify key gaps and to develop an initial framework. The researcher reviewed three bodies of knowledge (1) organisational studies, (2) BE in services and (3) organisational development and change models. The key contribution from each body of knowledge is outlined next

The review of organisational studies placed the present study in context and identified current trends in organisational research relevant to the study. Current organisational studies reflect earlier work from both scientific management and behavioural approaches. These two dominant approaches are recognised to influence quality management and business excellence theory and practice (Gallear & Ghobadian, 2004). In their paper on the evolution of excellence, Hermel and Ramis-Pujol (2003) highlight a shift in “excellence” research towards “integrated development” (p.240). For example Kanji and Wallace (2000) integrate process and results elements in their BE framework; Leonard and McAdam (2002) advocate that TQM is implemented at three integrated levels throughout the organisation - strategic (strategy formulation), tactical (strategy implementation) and operational (improvement projects). Burke and Litwin (1992) suggest organisational change is achieved by integrating transformational and transactional factors with transformation factors such as leadership, mission and strategy having a greater influence than transactional factors such as structure, systems and practices. Integration is also promoted by Thiagarajan and Zairi (1997) but they recommend organisational improvement is best achieved with a balance of hard and soft practices.

A review of the BE in services empirical research identified gaps in the knowledge base. To date researchers have tended to focus on the elements and the results of BE and appear to have

neglected examining the process of implementation Attention is given to key elements such as (1) the organisational context, (2) key practices, and (3) business results. When focusing on the organisational context, researchers have examined how size and structure of an organisation influence the implementation of BE (Bauer, Falshaw & Oakland, 2002; Corbett & Angell, 2004). A number of studies have identified key practices perceived to enable and constrain implementation (Angell, 2001; HEFCE, 2004; Kanji & Wallace, 2000). The impact of BE on business results appears to have attracted the greatest attention with many researchers examining the relationship between BE practices and business results (Corbett & Angell, 2004; Kanji & Wallace, 2000; Saunders & Mann, 2005; Przasnyski & Tai, 2002; Singhal & Hendricks, 1999; Sirca, 2003; Winn & Cameron, 1998).

The review of organisational change literature provided new insights for how organisations start the BE journey. The perspectives of organisational change proposed by Van de Ven and Poole (1995) can be applied to further understand the BE journey. These writers analyse change from three perspectives: (1) a lifecycle perspective - moving an entity towards an end goal via a prescribed sequence of progressively more mature stages, (2) a teleological perspective - moving an entity towards an end goal via repeated cycles of improvement, and lastly, (3) a dialectical perspective - where the organisation is seen as existing in a complex world of competing events and people.

The concept of applying a dialectical perspective of change has been attempted by Dawson and Palmer (1995) and by Unwin (2005). The work of these writers influenced the development of the initial conceptual framework developed by Innes (2005). Dawson and Palmer apply a contextual approach in order to describe the implementation of quality management and to develop a processual model to represent this process. Unwin challenges the focus on BEFs and encourages researchers to look beyond the “tools” and to examine how users apply these “tools” to achieve improvement. In keeping with the metaphor of the journey, he proposes that users need a change in mindset to take them beyond seeing the change journey as following a single prescribed path or “day trip” to each the end point. Instead he proposes that a more appropriate mindset is a preparedness to experiment, to respond dynamically to multiple influences and to accept that progress may be non-linear. The BE journey thus becomes a “journey of exploration” concerned with how to apply tools within a context of planned and unplanned interactions.

Based on the identified needs outlined above and the findings from the literature review the researcher developed the aim of the research, an initial conceptual framework and associated research questions. The aim of her study “to develop a conceptual framework that represents how New Zealand service organisations start the BE journey”. For this study, the purpose of the conceptual framework was to represent current understanding of how service organisations start the BE journey (Miles & Huberman, 1994) rather than to provide a full causal model as proposed by Yin (1994).

The primary research question was “how do New Zealand service organisations start the BE journey?” and the associated questions were:

Q1. How is the organisational profile perceived to influence the start of the BE journey?

Q2. How are improvement processes perceived to influence the start of the BE journey?

Q3. What are the key practices and who are the key people perceived to influence the start of the BE journey? To what extent are these practices and people perceived to influence the BE journey?

Q4. How are key practices and people perceived to influence the start of the BE journey?

Q5. How is organisational performance perceived to change from the start of the BE journey? To what extent is organisational performance perceived to change?

Empirical research

The case study method and the survey method were used sequentially to study the BE journey within New Zealand service organisations. The case study method provided the opportunity to describe how seven service organisations started the BE journey and to carry out a cross-case analysis to identify key themes. The survey method was then used to further develop the researchers understanding for the BE journey and to confirm these key themes with a larger group of service organisations (38) known to be using a BE framework. This mixed methods methodology provided the opportunity to hear diverse and divergent views, and to gain the benefits of both qualitative and quantitative methods (Tahakkori & Teddlie, 2003).

The key findings from the study are presented next. These represent an integration of case study findings and survey results. Respondents' comments are presented within quotation marks and questionnaire items are identified in *italics*.

Q1: How is the organisational profile perceived to influence the start of the BE journey?

The target population for the study included New Zealand service organisations known to be actively engaged in BE. The majority of the study respondents identified as either private or public large service organisations (employing 100 or more people, as defined by Cameron & Massey, 1992).

The survey respondents reported the key drivers for starting the BE journey as the *need for organisational growth*, *customer influence* and the *need to be more competitive*. As presented in Figure 1 the *need for organisational growth* was perceived to have the greatest influence on the decision to start. Drivers such as *government influence*, *new organisation*, *crisis or restructure* were typically perceived to have little or no influence on the decision to start the BE journey.

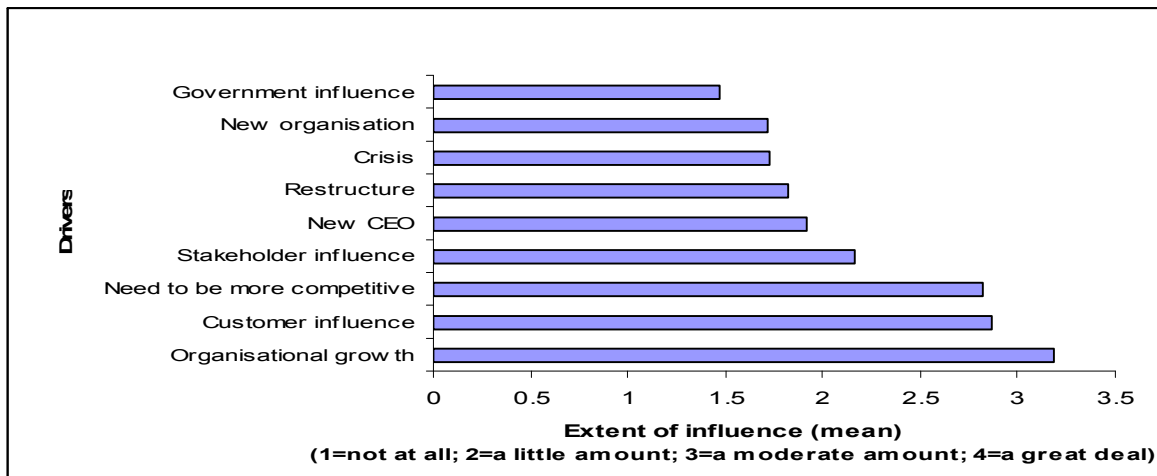


Figure 1: Extent of influence for drivers perceived to influence the decision to start the BE journey

The key drivers for adopting the CPE were reported to be *to guide continuous improvement, need for a framework to co-ordinate a range of improvement initiative, internationally proven to work, and external measure of performance*. As shown in Figure 2 the least influential drivers were perceived to be *access to BE networks, benchmarking and external recognition and credibility*.

The findings provide some evidence for how preparation and planning is perceived to influence the start of the journey. Case respondents identified a number of practices and people perceived to be influential prior to the start of the journey, such as *achieving clarity of direction (strategic plan has a customer and results focus, organisational values are integrated, CEO focuses on both leadership and strategy, executive work together as a cohesive group); and capability (strong support processes, capability in project work and project team work, organisation is able to attract talented people)*. Although these practices were perceived to influence the start of the journey there was no evidence that organisations assessed their capability or consciously built capability prior to starting the BE journey. Both case and survey organisations had however considered the scope of implementation. While case organisations described a range of approaches from isolated “health checks” and “cherry picking”, to staged implementation, survey respondents identified a *whole organisation* approach as the most enabling approach.

Q2. How are improvement processes perceived to influence the start of the BE journey?

Findings from the cross case analysis indicate sequential processes and cycles of improvement are perceived to influence the start of the BE journey. Participants described the start of their journey as cumulative levels of maturity – with organisational and BE practices becoming more aligned and integrated over time. As suggested by Unwin (2005) there was no evidence for a consistent sequence of practices in that each organisation perceived different practices at different times to be influential. However, there was evidence for organisations observing cycles of improvement focused at the strategic, tactical and operational levels as suggested by Leonard and McAdams (2002). For example *BE is adopted as a long term improvement strategy, (strategic); BE and organisational planning are*

integrated (tactical); *improvement projects are actioned* (operational). Processes associated with BE practices were reported to vary with the maturity of the BE organisations. For example, the survey results indicate that organisations adopt more advanced self-assessment processes as they matured.

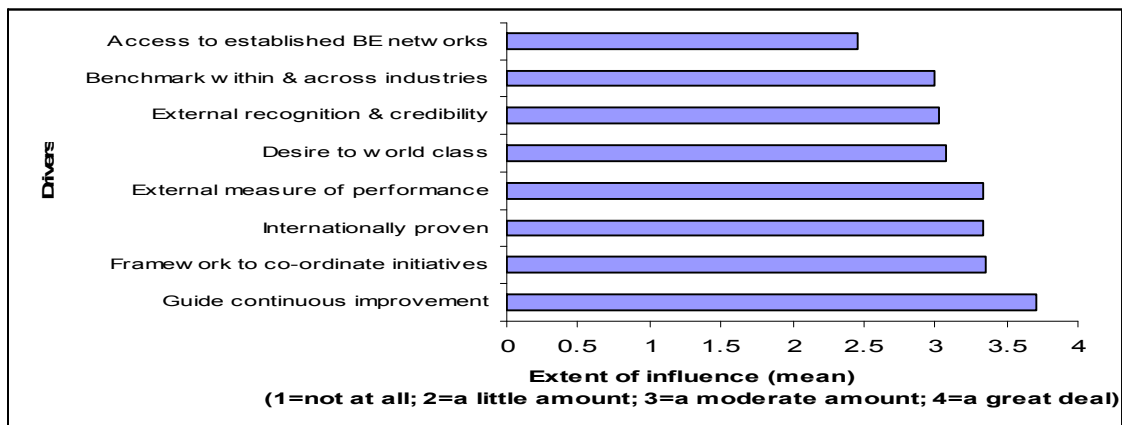


Figure 2: Extent of influence for drivers perceived to influence the decision to adopt the CPE

Q3. What are the key practices and who are the key people perceived to influence the start of the BE journey? To what extent are these practices and people perceived to influence the BE journey?

The findings indicated that multiple practices and people are perceived to influence the start of the BE journey. These were categorised as organisational practices and people (may be present for any improvement journey) or BE practices or people (specific to a BE journey). Key practices and people were identified as those perceived to be either highly enabling or highly constraining by at least 25% of the survey respondents. The extent to which these practices and people were perceived to influence the start of the journey is shown in Figures 3 to 6. In addition, a number of respondents added to the list of practices - the *need for senior people to develop their expertise as leaders and facilitators of organisational change*.

Overall, the findings indicate the start of the BE journey is perceived to be influenced by a balance of key practices and people. While the majority of the key practices and people were perceived to be enabling there were only two practices perceived to be typically constraining; 27% of respondents perceived *conflicting priorities between urgent work and improvement work* to be constraining; and 35% of the respondents perceived *the critical few improvement projects are (not) resourced* to be constraining. Also of note is the number of different individuals or groups of people perceived to be highly influential. For example within the list of key people there are six different roles or positions identified, such as the CEO, executive, managers, staff, BE champion, and BE advisor or coach.

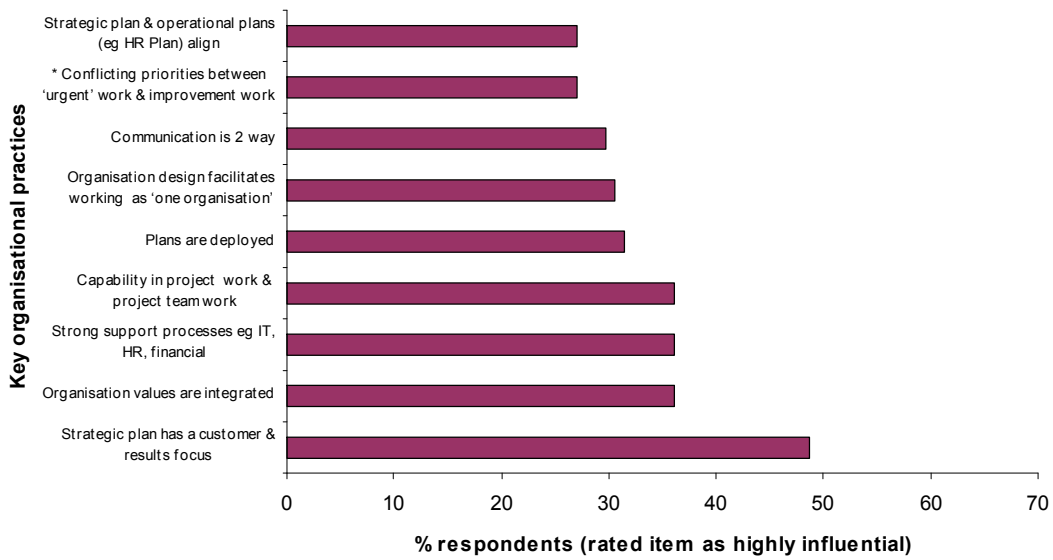


Figure 3: Key organisational practices perceived to influence the start of the BE journey

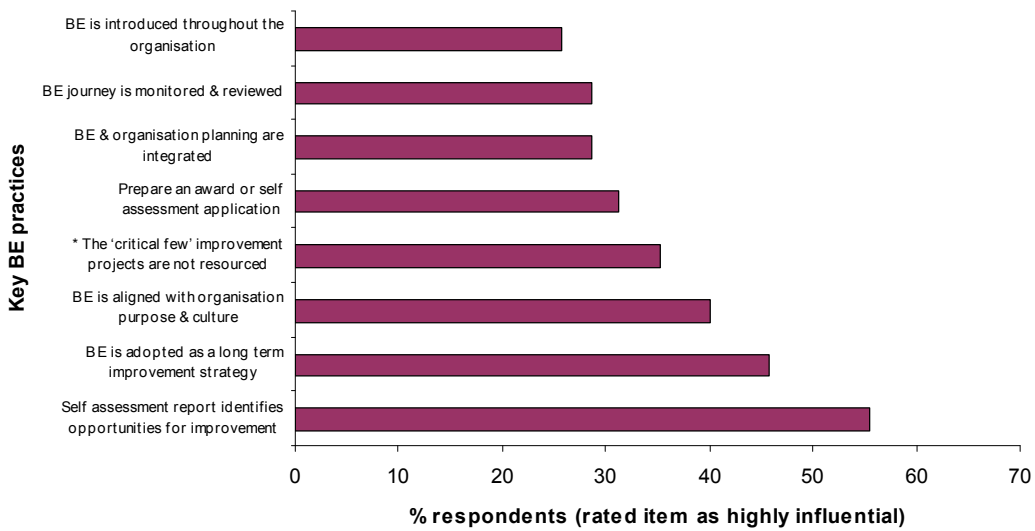


Figure 4: Key BE practices perceived to influence the start of the BE journey

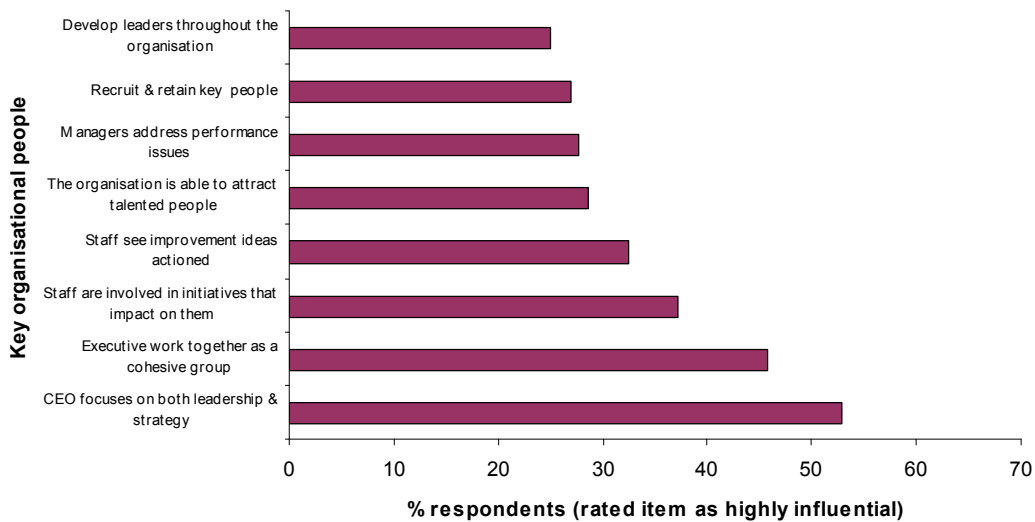


Figure 5: Key organisational people perceived to influence the start of the BE journey

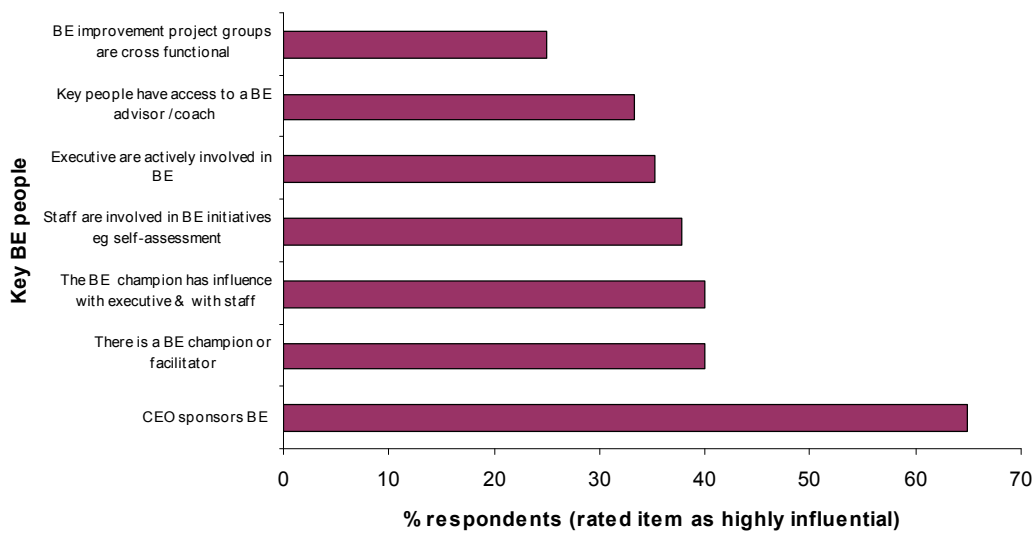


Figure 6: Key BE people perceived to influence the start of the BE journey

Q4. How are key practices and people perceived to influence the start of the BE journey?

Key practices and people were perceived to influenced the BE journey by improving the clarity of direction, relationships, capacity and expertise. For example strategic plans were perceived to provide *clarity of direction*, cross-functional improvement groups were perceived to influence internal working *relationships*. The self-assessment process was perceived to influence organisational *capacity* as people ‘worked smarter’. Involvement in BE was perceived to be influential in ‘shifting managers from being master technicians to being business managers’. Key practices and people were also perceived to influence *confidence and trust* in the organisation, *energy and interest* in the BE journey and

voluntary involvement in improvement. These themes were grouped as: organisational culture (eg clarity of direction), organisational climate (relationships, capacity, and expertise) and employee engagement (confidence and trust, energy and interest, voluntary involvement). Burke and Litwin (1992) make the distinction between culture and climate, describing culture as being concerned with values and principles that guide behaviour; and climate as being concerned with the effectiveness of the work unit and work relationships. Employee engagement is defined by Lloyd and Bell (2005) as “a state of emotional and intellectual involvement that an employee has in his or her organisation” (p. 24).

Q5. How is organisational performance perceived to change from the start of the BE journey? To what extent is organisational performance perceived to have changed?

Respondents perceived the BE journey to have influenced organisation change at the strategic level (eg business results), tactical level (eg organisational capability) and operational level (eg project implementation). Of particular interest to this paper is the change in organisational capability, defined as change in CPE score over time and perceived change in engagement dimensions.

Figure 7 presents the change in CPE scores for those survey respondents who had completed at least three CPE assessments. Although it is possible to see patterns in the rate of improvement for these organisations, there needs to be caution in comparing results as there was variation in the assessment approach used.

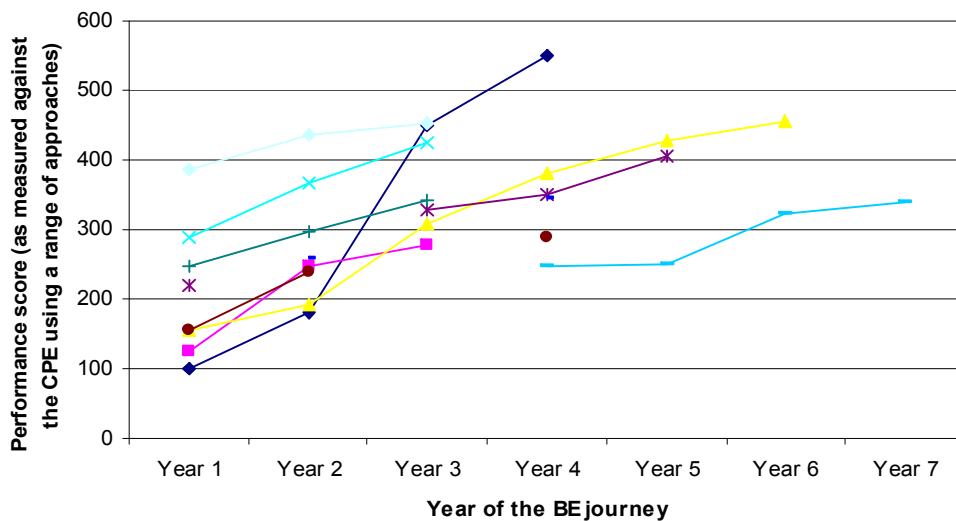


Figure 7: Change in CPE score over time

The survey respondents reported perceived change in engagement items as presented in Figure 8. For example they perceived BE had contributed “significantly” or “a great deal” to improvement in clarity of direction (91%), energy and interest in improvement (82%), confidence and trust in the organisation (79%), stakeholder and customer relationships (76%), business results (76%), organisation-wide capacity (76%), management expertise (76%) and voluntary improvement in improvement (73%).

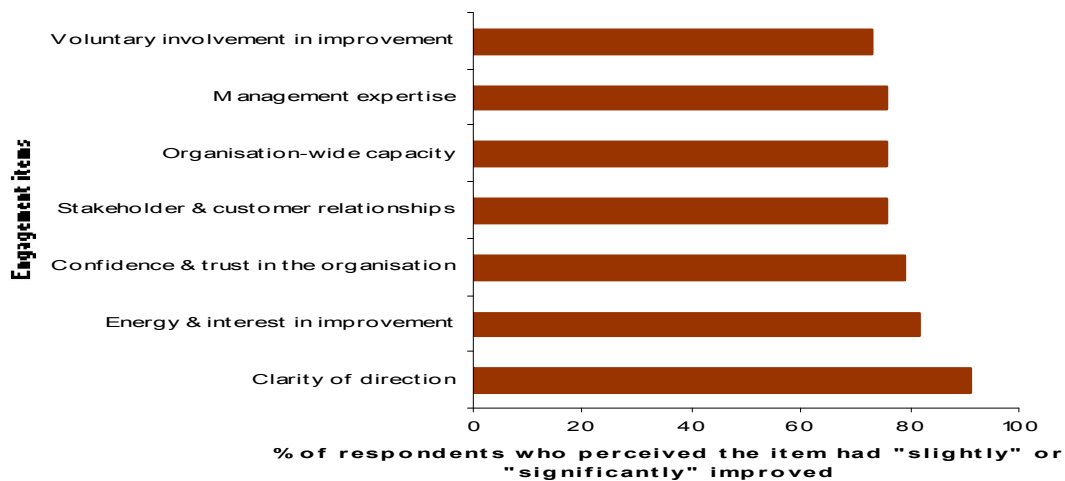


Figure 8: Perceived change in engagement items

The final phase for the development of the Service Excellence Framework involved integrating the literature review and the key findings from the empirical research. The current version of the Service Excellence Framework is briefly described next.

The Service Excellence Framework

The Service Excellence Framework (Innes, 2005), is presented as Figure 9 to represent the start of the BE journey as an aligned and integrated approach to improving organisational results. Embedded within the framework are five guiding principles that reflect the theory underlying the Framework and five key elements, each of which is perceived to influence the start of the BE journey to some extent. It is proposed by Innes that when considered together, the principles and the key elements provide a guide for starting the BE journey. Both the principles and the key elements are described briefly here with further detail of the key elements provided in Appendix A.

The five guiding principles suggest the start of the BE journey is likely to be enhanced when:

Principle 1: There is alignment between the organisational profile, the actions taken and the organisational results achieved (Burke & Litwin, 1992; Pettigrew, 1999)

Principle 2: The journey is seen as a dynamic, emergent and continuous improvement process (Dawson & Palmer, 1995; Leonard & McAdam, 2002; Pettigrew, 1999; Unwin, 2005)

Principle 3: Multiple key practices and people are implemented simultaneously; balance is achieved between organisational or BE items, as well as transformational or transactional factors (Burke & Litwin, 1992; Thiagarajan & Zairi, 1997)

Principle 4: Key practices and people influence organisational culture, organisational climate and employee engagement (Burke & Litwin, 1992; Lloyd and Bell, 2005)

Principle 5: Organisational results are achieved at the strategic, tactical and operational level of the organisation (Leonard & McAdams, 2002)

The Service Excellence Framework consists of five elements as presented in Figure 1. Within each element there are dimensions and items. Element 1 represents the **organisational profile** and provides the overall context for the journey. This elements addresses how the journey is influenced by the organisation's attributes, the rationale for starting the BE journey and the approach taken when starting the BE journey. The **improvement processes** (Element 2) provide a temporal view of the BE journey. This element addresses different organisational change perspectives such as the sequence of the BE journey, the cycles of improvement and processes associated with BE practices. Element 3 represents the **key practices and people** shown to be highly enabling or constraining. The key practices and people identified by Innes (2005) are grouped within the CPE categories and listed in Appendix A. The Framework represents the proposition that key practices and people influence the BE journey via **engagement** (Element 4). The engagement element considers the influence of organisational culture, organisational climate and employee engagement. Element 5 represents the **organisational result** areas that may be achieved from the start of the BE journey.

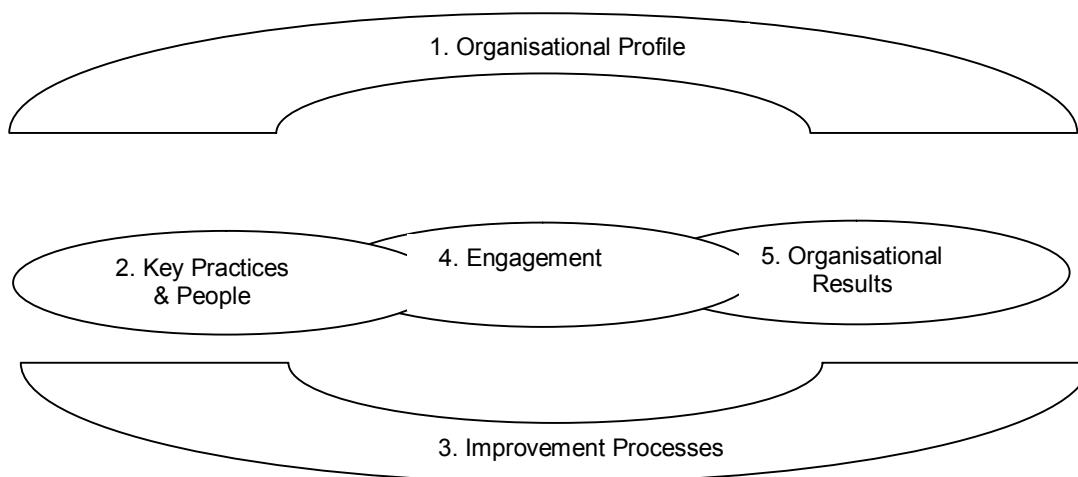


Figure 9: The Service Excellence Framework (Innes, 2005)

In Part One of this paper we describe the development and the current version of the Service Excellence Framework (Innes 2005). Part Two of the paper describes how a large service organisation, Massey University, New Zealand has applied the Service Excellence Framework to guide the start of their improvement journey.

PART TWO: APPLYING THE SERVICE EXCELLENCE FRAMEWORK

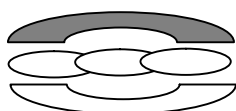
Massey University is large public university in New Zealand comprising of five Colleges distributed over three campuses located 640 kilometres (400 miles) apart in the cities of Auckland, Palmerston North and Wellington. The Extramural programme (distance learning service), considered the fourth 'campus', has national reach. The university offers an extensive range of both undergraduate and postgraduate programmes. In 2006, the university enrolled over 40,000 students (head count). The following describes how Massey University started the BE journey, guided by the principles and the key elements of the Service Excellence Framework.

Guiding Principles

The guiding principles underlying the Service Excellence Framework were influential in framing how Massey University started its journey. When considering the start of the journey, key people reviewed the guiding principles of the Framework to integrate their existing thinking, which also drew on the Baldrige Criteria for Performance Excellence (CPE) and Strategic Enrollment Management (SEM) principles (Henderson, 2004). SEM, developed and practised in the higher education sector in the United States, is a set of principles and practices for improving the effectiveness of student management processes (Black, 2001). From that review the University's approach, branded as the Service Excellence Programme, was established. The programme's principles reflected the strategic direction of the University, strategic enrollment management principles and those proposed for the Service Excellence Framework. The principles therefore provide the foundation for the programme and simple rules to guide decision making. They are:

- Service Excellence is strategically relevant; it aligns with our Profile
- Service Excellence is a dynamic, emergent and non-linear continuous improvement journey
- Service Excellence is integrated; it ensures a seamless student experience from application to graduation, across Colleges and general services
- Service Excellence is feasible; it focuses on services that matter most to students; key practices and people are selected and resourced
- Service Excellence is sustainable; key practices and people are actioned to positively influence organisational climate, organisational culture and engagement of key stakeholders
- Service Excellence is results focused; results are monitored and achieved at the strategic, tactical and operational levels of the organisation. We learn from our results.

Element 1: Organisational Profile



The Organisational Profile (Element 1) provides the overview of the organisation; its attributes, the rationale for starting the BE journey and the approach taken when starting the BE journey.

For Massey University, the **decision to start** the improvement journey was in response to a desire to be more student-focused in the delivery of services and to gain better value for effort invested in service development and improvement initiatives. Student focus was a core premise taken from the SEM concept of structures and processes relevant to higher education. The Director of National Student Relations, the initial sponsor, was attracted to adopting the Baldrige CPE as it added a framework with which to co-ordinate improvement initiatives and an internationally referenced method of defining and measuring excellence. The Service Excellence Framework was seen to be complementary to the CPE, as it offered a guide for how to start the BE journey and was based on empirical research with organisations similar to the University (large public service organisations).

The CPE was first introduced as a pilot within National Student Relations, the University's central student relations and administration unit based in Palmerston North. In the following year this pilot initiative was branded as Service Excellence and refined by integrating the Service Excellence Framework. The Service Excellence Programme was then extended to the student administrative services at the other two campuses in Auckland and Wellington. At the time these regional campuses were seeking to boost student retention and to address a negative trend in student satisfaction.

Cross-functional project teams were established at Auckland and Wellington to develop the **University's approach** to starting the journey. The project team consisted of National Student Relations staff and the Regional Registrars and their service managers. The teams established the approach by defining the Service Excellence Programme, establishing the purpose and goals for the Programme, defining the guiding principles as described above and deciding on the scope of the programme.

Service Excellence was defined as "our approach for creating systematic and measurable improvements in those services that matter most to students" and the purpose was established as "to support national and regional Academic Plans by providing student-focused services that are proven to facilitate student success (defined as persistence and timely completion of studies)".

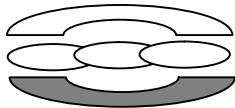
Initial goals were set for the Service Excellence Programme and desired results and key measures were identified for each goal, with baselines being established where feasible. These initial University goals included:

- To provide services and facilities that meet student needs in order to impact on their success (persistence and timely completion of their studies)
- To develop our capability to continually improve our services for students
- To contribute to Massey University's reputation as a student focused university and hence positively influence referral from current and past students

The scope of the Service Excellence Programme was determined to be from initial enquiry services to graduation services; and to apply to all services provided by Colleges, regionally based services and nationally shared services. The Programme currently is not mandated to include the teaching and researching experience. The approach to implementation (as proposed by Balogun, 2006) was to

seek a balance between (vertical) formal national direction and capability-building, and (horizontal) leverage from the strong informal network between regional leaders, Regional leaders were seen as key influencers and were invited to contribute to the direction of the Programme as well as being encouraged to customise the Programme as relevant for their needs, ensuring that the Programme made sense to them.

Element 2: Improvement processes



The improvement processes (Element 2) provides the temporal perspective for the BE journey and is subdivided into three dimensions: sequence of the BE journey, cycles of improvement, processes associated with BE practices.

Based on the guidance provided by the Service Excellence Framework, the Massey University team consciously adopted what Unwin (2005) has described as an “explorer” mindset. That is, they viewed the **sequence of the Service Excellence Programme** as a dynamic, emerging, continuous improvement process. Rather than seeking to prescribe a simple, repeatable formula, they recognised that the journey would combine action with ongoing evaluation, and decision making in response to new situations and conditions.

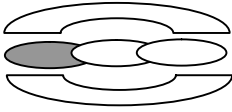
Attention was also given to the stages of maturity described in the Framework, with the ultimate goal being to achieve stage 3 across the University (ie. Business Excellence fully aligned and integrated with the University Profile). A decision was made, consistent with the University’s strategic commitment to building distinctive and complementary character at each of the campuses, to facilitate each campus at its own pace through each stage of maturity, To date the pilot group (National Student Relations) and Auckland have experienced the use of the CPE as a performance measurement tool (Stage 1). This stage of maturity has been followed by introducing BE as an improvement strategy aligned with the Profile and parallel with the organisational planning process. The University is yet to achieve the stage 3 level of maturity within any of the campuses.

The project team customised the PDCA **continuous improvement cycle** (Deming, 1986) and established the Service Excellence Process. This process consists of five continuous improvement steps: (1) Establish the organisational need and focus, (2) Plan for improvement, (3) Implement key improvement initiatives, (4) Evaluate performance, and (5) Communicate. The process is applied at the strategic, tactical and operational levels of the organisation as illustrated in Table 1.

The third improvement process dimension within the Framework guided the University to consider the **processes associated with BE practices**, such as self-assessment against the CPE. While the Service Excellence Framework identifies the self-assessment process and assessment report as key enablers, it also guides organisations to select an approach to self-assessment that is relevant to the organisation’s level of maturity. For example, the pilot group, National Student Relations initially undertook a “mini-assessment” which involved a workshop format to review practice and performance based on informal knowledge. The group then progressed to a “facilitated-assessment” which involved a trained evaluation team (including an external facilitator) who systematically assessed practice and performance against the CPE, based on evidence. The group has since progressed to applying a

more advanced approach, an external assessment carried out by a independent benchmark organisation.

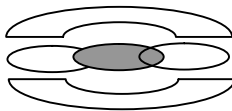
Element 3: Key Practices and People



Element 3: Key Practices and People guides the organisation both to select and to action those practices and people perceived to be highly enabling and to manage the influence of those practices which are likely to be highly constraining.

The Service Excellence Framework indicates that **key practices and people** are likely to be most influential when they are aligned with the organisational profile, deployed throughout the organisation and act together. Each organisation needs to consciously select and activate a portfolio of practices and people relevant to its own situation. While influenced by the key practices and people identified by Innes (2005), Massey University has selected and actioned its own set of key practices and people at the strategic, tactical and operational levels within the organisation. A selection of these key practices and people is shown in Table 1.

Element 4: Engagement



Element 4: Engagement addresses the way key practices and people are perceived to influence organisational culture, organisational climate and employee engagement.

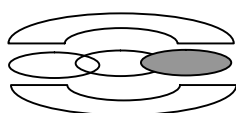
It has been shown that where organisational culture and organisational climate “fit” the organisational profile and the change initiative, then employee engagement and organisational results are enhanced (Burke & Litwin, 1992; Lloyd & Bell, 2005; Mason, 2004). Massey University is yet to develop a systematic and comprehensive approach to facilitating engagement. To date we have identified those climate and culture items that our staff perceive to be influencing their workplace. These items are integrated into the annual Staff Workplace Survey.

Table 1: A selection of key practices and people

Sub-Programmes	Organisation-wide	NSS / Regional / Student Group
STRATEGIC Service Excellence Programme	The Service Excellence Programme is an organisation wide initiative which contributes to the University Profile (including national and regional Academic Plans) by providing student-focused services that are proven to facilitate student success (defined as persistence and timely completion of studies).	
Planning for Service Excellence	The student focus and the Service Excellence Programme feature in the University Profile (3 year timeline) Key people steer the Programme; this group has influence with University leadership & has access to a BE advisor	The student focus and the Service Excellence Programme feature as relevant in selected National Shared Service(NSS) / Regional Profiles. Key people are identified as champions within the NSS / regional campuses; this group has access to a BE advisor
TACTICAL Talking Excellence	Talking Excellence brings key people together to discuss the Service Excellence Programme and student / service results	SE is discussed “formally” within existing management meetings; well informed “informal” dialogue is encouraged
Implementing Service Excellence	A Service Excellence Action Plan is developed, implemented & evaluated for the University (one year timeline)	A Service Excellence Action Plan is developed, implemented & evaluated for selected NSS / Region services (one year timeline)
Listening to our students	We identify key student groups and develop our understanding for their needs; The outputs of this sub-programme are the Service Standards, the Service Competencies and the annual Student Satisfaction Survey and associated workshops	Regions adapt the Service Standards and Service Competencies for their key student groups and needs; The Survey provides results for NSS / Regional services In addition the Regions carry out local approaches for listening to their students on a more regular basis.
Listening to our staff	The annual Staff Workplace Survey assesses staff perceptions of their workplace and captures “actionable” opportunities for improvement.	

	Questions are included which address climate, culture & engagement factors understood to influence the BE journey	
Performance Information	Key service performance measures are defined; performance information is gathered; results are presented to Council, executive, national & regional staff, key student group leaders. Self-assessment against the Baldrige Criteria for Performance Excellence is available; the approach is customised for the needs of each group	
Delivering Service Excellence (DSE)	DSE is a competency based training programme designed for frontline managers; provided by the Training & Development Unit	DSE is customised to meet NSS / Regional needs; primarily a coaching programme, it is provided by frontline managers
Quick Wins	Quick Wins is a simple project management / project team work training programme; provided by the Strategic Projects Office	
Core & support processes	Designing and documenting core processes is essential to ensure consistent service delivery Support processes (especially technology based) are critical to ensure efficient service delivery	
OPERATIONAL Improvement projects	Massey University is proposing to research the relationship between student results and student satisfaction with services	Both Auckland and Wellington are investing in focused retention initiatives

Element 5: Organisational Results



Element 5: Organisational Results represents how organisational performance changes from the start of the BE journey. The Service Excellence Framework guides organisations to capture organisational results at three levels: strategic (business results), tactical (organisational capability results) and operational (progress results).

Massey University measures and reports student and service related results at the strategic, tactical and operational levels, as listed in Table 2. Although the Service Excellence Programme is yet to be introduced throughout the University, early results demonstrate steady improvement for key measures. For each of the result areas listed in Table 2 below, we are able to report performance trends and internal comparative information.

Table 2: Selected measures and the measurement approach adopted

Focus of results	Selected measures	Measurement approach adopted
STRATEGIC	• Student success	• Change in retention from year 1 to year 2
	• Brand performance	• Change in current students likely to refer (Student Satisfaction Survey)
TACTICAL	• Staff engagement	• Change in staff perception over time (Staff Workplace Survey)
	• Improvement momentum	• Change in CPE score over time
OPERATIONAL	• Service performance	• Perceived performance for key service features (Student Satisfaction Survey)
	• Value for \$s	• Perceived contribution of services to student success (Student Satisfaction Survey)

CONCLUSION

This paper describes the development of the Service Excellence Framework, a conceptual framework designed to represent how service organisations start the BE journey (Innes, 2005). The framework comprises five guiding principles distilled from a number of different theoretical bases and five key elements, each of which is perceived to influence the start of the BE journey to some extent. The Framework complements other BEFs in that it focuses on the start of the BE journey and the nature of the BE journey rather than on measurement of organisational performance.

The Service Excellence Framework has the potential to inform future research about the BE journey. The scope of the Framework could be extended by focusing on how service organisations with different organisational profiles approach the BE journey (e.g. organisations of different sizes or from countries other than New Zealand). Also, each element within the Framework could be researched in greater depth and the relationships between the elements examined. Perhaps the most significant opportunity for future research is to explore further the relationship between key practices and people, engagement and rate of improvement.

It is proposed that when considered together, the principles and the key elements of the Service Excellence Framework have the potential to guide practitioners as they facilitate the start of their BE journey. This proposition is illustrated by describing how a large University has applied the Service Excellence Framework to guide the start of its BE journey. Early results indicate that the Framework

has assisted this University to achieve steady improvement in its organisational capability and performance. The Framework also proposes that organisations reflect on the way in which their journey is conceptualised during the starting phase. Adopting the mindset of an explorer rather than simply a day-tripper is proposed, given both the strategic salience of the journey and the resource commitment when any large service organisation sets out to achieve strong and sustainable improvement.

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APPENDIX A:

Appendix A provides a detailed description of the key elements for the Service Excellence Framework. The focus of each element is explained and the associated dimensions and items are described. Items in italics can be traced to the items listed in the questionnaire (Innes, 2005).

Element 1: Organisational Profile represents how the organisational profile may influence the start of the BE journey. It provides the organisational context for how an organisation approaches the start the BE journey. Based on the literature review and findings from the study, the researcher subdivided Element 1 into three dimensions: organisational description, organisational challenges, and preparation and planning to start the BE journey. These dimensions and associated items are described in Table A.1.

Table A.1: Element 1 - Organisational Profile

Dimension	Items
Organisational description	<p>The conceptual framework has been developed with service organisations in New Zealand that are engaged in the BE journey.</p> <p>In New Zealand service organisations are defined as not primary or goods producing organisations (Statistics New Zealand, 2005). Service organisation in the study were large (100+, Cameron & Massey, 1992), public and private organisations (ANZSIC96, Statistics New Zealand, 1996)</p>
Organisational challenges	<p>The key drivers to start the BE journey were the <i>need for organisational growth, customer influence and the need to be more competitive.</i></p> <p>The key drivers to adopt the CPE were <i>to guide continuous improvement, to provide a framework to co-ordinate initiatives, internationally proven and to provide an external measure of performance.</i></p>
Preparation & planning to start the BE journey	<p>The start of the BE journey is perceived to be influenced by the attention given to preparation and planning for start the BE journey.</p> <p>Attention may be given to:</p> <ul style="list-style-type: none"> - the alignment between the organisational profile and BE (<i>eg strategic plan has a customer & results focus, BE is aligned with organisation purpose & culture</i>), - the capability of the organisation and the people (<i>eg Strong support processes, organisational values are integrated, capability in project management</i>), and - the scope of implementation (<i>eg BE is introduced throughout</i>)

Element 2: Improvement processes represents how organisational development and change processes may influence the start of the BE journey. It provides the temporal perspective for the BE journey and is subdivided into three dimensions: sequence of the BE journey, cycles of improvement, processes associated with BE practices. These dimensions and associated items are described in Table A.2.

Table A.2: Element 2 –Improvement processes

Sequence of the BE journey	<p>The BE journey can be characterised as:</p> <ul style="list-style-type: none"> - a journey of continuous improvement with three time frames i.e. decision to start, starting the BE journey and sustaining the BE journey; - a journey with three stages of maturity; (1) CPE is used as a performance measurement tool only, (2) BE is adopted as an improvement strategy that is aligned with the organisational profile and parallel with the organisational planning process, (3) BE is adopted as an improvement strategy that is aligned with the organisational profile and is integrated with the organisational planning process. - the sequence of practices adopted are likely to be unique to the organisation vs. there being “one best way”
Cycles of improvement	<p>The BE journey can be characterised by ongoing cycles of improvement at three levels of the organisation, such as:</p> <ul style="list-style-type: none"> - strategic – establishes direction eg <i>BE is adopted as a long term improvement strategy, BE is aligned with the organisations purpose and culture, CEO sponsors BE</i> - tactical – transfer strategy into action eg <i>there is a BE champion, the BE champion has influence with executive and staff, staff are involved in BE initiatives, self-assessment report identifies opportunities for improvement, critical few projects are resourced</i> - operational – tools & techniques eg <i>BE improvement projects are cross-functional, strong support processes</i>
Processes associated with BE practices	<p>Processes associated with BE (e.g. assessment against the CPE, benchmarking) are perceived to be enhanced when aligned with the organisational profile, integrated into the planning cycle and when the process actively involves and engages key people.</p> <p>For example: the process adopted for assessment against the CPE appears to reflect the maturity of the BE organisation; while the approach varies, assessment is often carried out from year 1 of journey; both the process and the results of assessment are perceived to influence the start of the BE journey from year 1.</p>

Element 3: Key practices and people represent the practices and people perceived to be highly enabling or constraining by at least 25% of the survey respondents. Key practice and people items are identified in Table 3 and are organised within the system categories of the CPE. The majority of the key practice and people items were perceived to be enabling; those practices items perceived to be typically constraining are identified with an * in Table A.3.

Table A.3: Element 3 – Key practices and people

CPE category	Description for the key practices and people
1. Leadership	<p>Leadership is concerned with how the executive guide and sustain the organisation; and how they communicate with their staff.</p> <p>Many of the key practices and people are perceived to be influential prior to starting the BE journey i.e. <i>CEO focuses on both leadership & strategy; CEO sponsors BE; BE is aligned with organisation purpose & culture; BE is adopted as a long term improvement strategy, BE is introduced throughout the organisation.</i> Other key practices and people are perceived to be influential throughout transition i.e. <i>Executive work together as a cohesive group; executive are actively involved; organisational values are integrated throughout the organisation and communication is 2- way.</i></p>
2. Strategic planning	<p>Strategic planning addresses how the organisation establishes strategy and how it deploys the strategy.</p> <p>The focus of key planning practices and people is for achieving alignment and integration e.g. <i>strategic plans & organisational plans align; BE & organisational plans are integrated; BE & organisation planning are integrated.</i> The focus is also on ensuring plans are resourced and deployed e.g. <i>plans are deployed; * there are conflicting priorities between 'urgent' work & improvement work; staff see improvement ideas actioned; * the 'critical few' improvement projects are not resourced; there is a BE champion; the BE champion has influence with executive & staff.</i></p>
3. Customer & market focus	<p>The customer and market focus addresses how an organisation develops an understanding for their customers and markets, what they do with this knowledge and how they build the relationship with their customers. Customers may be external or internal to the organisation.</p> <p>Key practices associated with this category included <i>strategic plan that focused on results and customers,</i> and establishing an <i>organisation design that facilitates working as one organisation; BE projects are cross-functional</i></p>
4. Measurement, analysis & knowledge management	<p>This category focuses on how an organisation gathers and uses performance data and information; and how the organisation ensures people have access to relevant data and information.</p> <p>Key practices are perceived to be: <i>prepare an assessment or award application; self-assessment report identifies opportunities for improvement; BE journey is monitored & reviewed</i></p>
5. Human resources focus	<p>HR focus is concerned with how the organisations' work systems, people development systems and support systems contribute to achieving performance.</p> <p>The start of the BE journey is perceived to be influenced by the ability to <i>attract talented people and to recruit & retain key people; managers addressing performance issues; managers lead and facilitate change; develop leaders throughout the organisation; key people have access to BE advisor / coach; staff are involved in initiatives that impact on them; staff are involved in BE initiatives.</i></p>
6. Process management	<p>Process management is concerned with the design and implementation of core processes and support processes. Starting the journey is perceived to be influenced by <i>strong support processes</i> i.e. IT, HR, finance; and capability in <i>project work and project team work</i></p> <p>* key practice perceived to typically constrain the BE journey</p>

Element 4: Engagement represents how the key practices and people are perceived to influence the BE journey. It is proposed that the key practices and people enhance the BE journey when they are implemented to influence engagement. Based on the literature review and findings from the study, the researcher subdivided Element 4 into three dimensions: organisational culture, organisational climate, and employee engagement. These dimensions are described in Table A.4.

Table A.4: Element 4 – Engagement

Organisational culture	<p>Organisational culture is defined by Burke and Litwin (1992) as the “overt and covert rules, values and principles that guide organisation behaviour”. The BE journey can be characterised by two organisational culture items:</p> <ul style="list-style-type: none"> - <i>clarity of future direction</i>; key practices and people are perceived to influence the BE journey by enhancing the clarity of direction for the direction of the organisation, for how BE contributes to achieving the direction, and for what is considered important - <i>voluntary involvement</i>; key practices and people are perceived to influence the BE journey by enhancing a volunteer mindset within the staff
Organisational climate	<p>Organisational climate is defined by Burke and Litwin as the “perceptions held by individuals for how their work environment is managed and how people work together”. The BE journey can be characterised by three organisational climate items:</p> <ul style="list-style-type: none"> - <i>relationships</i>; key practices and people are perceived to influence the BE journey by enhancing the effectiveness of internal and external relationships, - <i>capacity</i>; key practices and people are perceived to influence the BE journey by building organisational capacity, and the capacity of the staff to participate in the BE journey, - <i>expertise</i>; key practices and people are perceived to influence the BE journey by enhancing organisational or individual capability
Employee engagement	<p>Engagement is defined by Lloyd and Bell (2005) as “a state of emotional and intellectual involvement that an employee has in his or her organisation” (p. 24). The study identified two engagement items:</p> <ul style="list-style-type: none"> - <i>confidence and trust</i>; key practices and people are perceived to influence the BE journey by developing staff confidence and trust in the organisation, management or BE journey - <i>energy and interest</i>; key practices and people are perceived to influence the BE journey by developing staff energy and interest in improvement and in the BE journey

Element 5: Organisational results represents how organisational performance is perceived to change from the start of the BE journey. It is proposed by the researcher that organisational results are achieved at the strategic, tactical and operational levels of the organisation. The researcher divided Element 5 into three dimensions: business results, business capability results and progress results. These dimensions are described in Table A.5.

Table A.5: Element 5 – Organisational results

Business results (strategic focus)	Business results align with the organisational profile and represent performance and improvement in key business areas. These areas may align with the business results category in CPE (Category 7) and include: product & service outcomes, customer focused results, financial and market results, human resource results, organisational effectiveness (productivity) results, leadership and social responsibility results
Business capability results (tactical focus)	<p>Business capability results are concerned with the tactical implementation of the BE strategy. The researcher focused on two result areas evident in the study:</p> <p><u>Change in CPE score since the start of the BE journey.</u></p> <p>The study results provide an indication of the results achieved by three organisations that had been assessed by the national award programme from year 1 of their journey. These organisations reported a mean annual improvement of 31 points over the first four years of their BE journey.</p> <p><u>Perceived change in organisational performance (since the start of the BE journey)</u></p> <p>Perceived change in organisational performance can be represented as four dimensions:</p> <ul style="list-style-type: none"> - <i>business results</i> eg product & service outcomes, customer focused, financial and market, human resource, organisational effectiveness (productivity) results - <i>organisational culture</i> eg clarity of direction, voluntary involvement in improvement - <i>organisational climate</i> eg relationships, capacity, expertise - <i>engagement</i> eg trust & confidence, energy & interest
Progress results (operational focus)	<p>Progress results are concerned with the effectiveness and efficiency of operations. Results may address: progress of improvement projects, effectiveness of projects and tools, the cost of projects and the BE journey.</p>