

EXCELLENCE AUDIT DIRECTIONS

Welcome to the Excellence Audit Process. Here are some guidelines for making this a rich and valuable analysis and improvement process for your organization.

- 1) Read The Book: Becoming Excellent – Applying The Ten Values Of Excellence To Your Organization. (129 pages) This will introduce you to the entire process, background and steps you can implement alone or when administering the audit with your managers and employees.

- 2) Once you are familiar with the material, Take the Audit Yourself . If you are the only one taking the Excellence Audit, print the longer 23 page version which will also include findings and interpretation of results. Plot your results on a copy of the Excellence Impact Chart provided. Keep this reference handy as you continue with organizational improvements.

- 3) A. If you are going to administer the Excellence Audit to a group of stakeholders, employees or even some customers in a focus group-like situation, print out the shorter 9 page Excellent Audit version so it will be less cumbersome for participants. In fact if you are going to simply administer the questionnaire without having them calculate and plot results on the impact chart etc. you can print out pages 2-7 only.

B. Combine together and average all of the scores for as many Excellent Audit questionnaires as you administer. Plot the results on the impact chart provided. If you have large groups of employees etc. and want to implement this process online- we can set that up for you as an online/email audit sent to all of your intended respondents (great for company-wide audits). Contact us for more details on setting up the online process for you:
<https://www.bartberry.com/contact>

- 4) Use the book and audit findings to lead improvement discussions and get everyone on board with beginning improvements. Show the relationship between improvements in customer satisfaction scores and return and recommend rate – the ultimate success measure for your business.

- 5) Complete the Excellence Values Prioritization Matrix exercise to define the three most important Values of Excellence for each particular customer group or product line. (Example- the three most important values for a restaurant with a steak loving customers: Quality, Self-

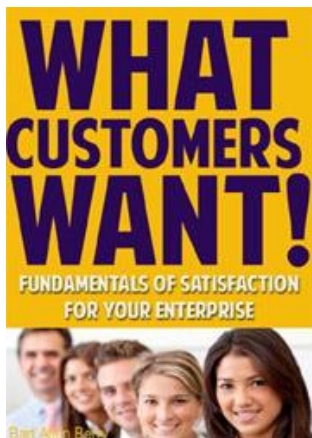
Management and Environment). Check to see if your organizational priorities are in alignment with delivering on these three most important for your steak loving customer.

- 6) Perform a competitor analysis on your three closest, most similar competitors. If you are a restaurant you might want to pick competitors within a specific demographic area. You might also want to evaluate competitors that contend for business on a particular night of the week with live bands, happy hour special etc.

- 7) Perform the People-Process-Structural Factors Analysis to get a realistic idea of where most of your improvement work needs to happen – and to perhaps find low hanging fruit in areas that will be easy to change. See the People-Process-Structural Factors Score sheet Included.

- 8) Develop a serious improvement strategy to capitalize on the strengths of your organization now, and find ways to mitigate your weaknesses. Make a comprehensive list, but start with easy improvements and gain momentum. Do this before you spend another nickel on any major expenditure for your business. The results of this analysis and improvement planning will totally change your strategic priorities.

- 9) As you establish your first baseline measurements now, using the Excellence Audit plan to revisit and re-measure as often as possible to see if improvement strategies and changes are having the desired effects. Be sure to look for accompanying measures of increases in sales, filling your restaurant, obtaining new customers from recommendations etc. to help track and validate your results.



Contact us about doing the onsite audit of excellence for your business combined with state of the art Customer Satisfaction Training for your employees. This powerful integrated process utilizes your own audit data for timely and focused training on the things that will make the most positive impact on your business. This is a two-day process on site at your business including audit, ½ day satisfaction training with your employees and improvement planning with you. <http://www.BartBerry.com>