Project Reports: Industry and Services

Third Workshop of the APO Best Practice Network

28–31 October 2002, Kuala Lumpur, Malaysia

BACKGROUND

1. At the APO Study meeting on the establishment of a Best Practice Network held in Singapore between 24 and 27 April 2001, the participants agreed that a best practice network could be set up among APO member countries. The network will generate knowledge on global best practices which will be useful for NPOs in helping their client organizations achieve best practice performance standards. It will support the transfer of best practice knowledge to clients of NPOs and position the NPOs as leaders in this knowledge transfer.

2. The APO Best Practice Network will initially conduct demonstration best practice projects in key topic areas of interest to client organizations of NPOs. At the First Workshop on the APO Best Practice Network held in Singapore between 26 and 28 November 2001, the participants identified eight (8) possible topics for demonstration projects. These topics are in the areas of the balanced scorecard performance management system, people development and management, and customer focus and service. The topics were identified based on the needs of client organizations of NPOs. In addition, a common framework for the benchmarking methodology to be adopted for conducting the projects was developed. Hence, a standard, consistent method of securing the participation of NPO client organizations in the demonstration projects and of carrying out benchmarking across countries for these projects was established.

3. At the Second Workshop on the Best Practice Network, the planning phase (which is the first phase in the agreed-upon benchmarking methodology) was initiated for the three selected demonstration projects. These are in the areas of the balanced scorecard, customer service, and human resources performance management system. Training was also conducted in the methodology so that project participants will be able to implement these projects in their own countries.

4. The NPO representatives from Thailand, Malaysia, and the Philippines were appointed as project leaders for the balanced scorecard, human resources performance management system, and customer service projects, respectively. They will coordinate the implementation of the projects by the participants in line with the timelines decided at the workshop. It was agreed that the project teams should secure the participation of best practice organizations, develop data collection tools, and prepare a report on the data collected by September 2002.

5. As a follow-up, a third workshop on the APO Best Practice Network was held on 28-31 October 2002 in Kuala Lumpur. Twenty-four participants from 14 member countries participated in the workshop and contributed to the deliberations. The workshop was facilitated by three resource persons (Mr Darshan Singh, Program Director, Business Excellence, SPRING Singapore; Mr Bruce Searles, Director, Benchmarking Partnerships, Australia, and Dr Jong Dae Kim, Kookmin University, Republic of Korea). The program schedule and list of participants and resource

persons are attached at Annexes A and B, respectively.

6.   The objectives of the third workshop were to:

    a.   Review the progress made by the demonstration project teams and refine the methodology adopted for the demonstration projects, if necessary;

    b.   Share the main interim findings of the demonstration projects, including the best practices identified; and

    c.   Develop an action plan on the specific follow-up actions to be taken for the demonstration projects over the next 5 months

7.   At the Third Workshop of the APO Best Practice Network, the project teams reviewed the methodology adopted based on their experiences in implementing the project. The data collected by the team so far was summarized and discussed. A preliminary list of learning needs and the best practices identified was compiled.

SUMMARY OF ISSUES AND RECOMMENDATIONS

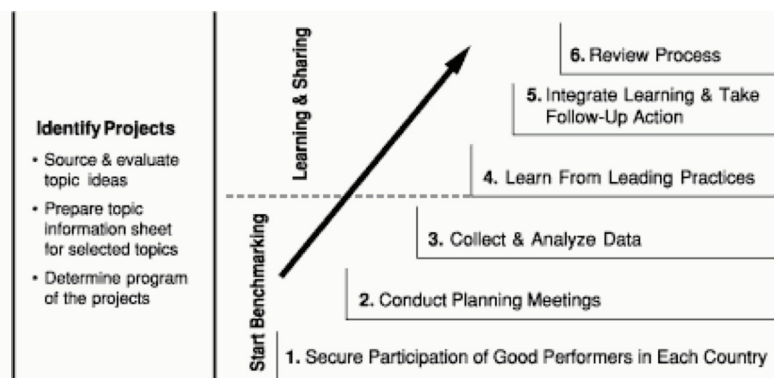### Participation in Demonstration Projects

8.   The member countries participating in the demonstration project on balanced scorecard are Thailand, Malaysia, Singapore, Indonesia, Mongolia, India, Republic of Korea, and Japan. As for the demonstration project on front-line customer service, the countries participating are Philippines, Fiji, Thailand, Indonesia, Mongolia and Singapore. The participating countries for the third demonstration project on performance management system are Malaysia, Thailand, Indonesia, Mongolia, Philippines and Bangladesh.

Benchmarking Methodology

9.   The APO Best Practice Network has adopted a ***Sharing and Learning Methodology Framework*** for the demonstration projects (See Figure 1). This framework will enable project teams to:

    a.   Identify topics of importance to NPO customers

    b.   Secure participation by likely NPO best practice organizations

    c.   Generate Knowledge on global best practices – who does them and how they do them

    d.   Share the knowledge amongst participating customer organizations and NPO's

    e.   Disseminate best practice knowledge in NPO countries

    f.   Improvement by participating customer organizations

    g.   Review and improvement of APO BPN processes

Figure 1. APO Best Practice Network Methodology Framework

Programming Process	Benchmarking Process

Identify Projects
- Source & evaluate topic ideas
- Prepare topic information sheet for selected topics
- Determine program of the projects

Learning & Sharing

Start Benchmarking

6. Review Process

5. Integrate Learning & Take Follow-Up Action

4. Learn From Leading Practices

3. Collect & Analyze Data

2. Conduct Planning Meetings

1. Secure Participation of Good Performers in Each Country

10. The key issues identified for improvement to the Methodology Framework at the workshop included the following:

    a. Standard approach to be adopted in validating the information gathered;

    b. Realistic timeframe to be adopted in completing each step;

    c. Approaches to convince customer organizations to participate in the project and address the fear of releasing data and information among customer organizations;

    d. Clear definition of roles of project team members;

    e. Proper handover process for new members;

    f. Reduce cycle time taken to develop and gain approval on questionnaires;

    g. Well-defined criteria for identification of best practice organizations;

    h. Definition of best practices;

    i. Availability of topic experts to support project team members in implementing the project in their own countries; and

    j. Ensure effective communication among project team members and regular progress reporting during the implementation of the projects.

11. These issues will be addressed in the improvements made to the draft manual on the benchmarking methodology for the demonstration projects prepared by the resource persons with inputs from the network members.

Sharing of leading Australian Practices

12. Mr Bruce Searles shared the leading practices adopted by Australian organizations in the 3 topics areas for the demonstration projects. A benchmarking project on the balanced scorecard was carried out in Australia in 2000. The aim of the benchmarking was for participating organizations to share and learn how to develop and implement a balanced scorecard. Over 12 organizations were involved in the benchmarking. In summary, the benchmarking organizations learned:

    a. How to get started – start with something and don't delay starting for the ultimate scorecard – develop it as you go

    b. Integration of measures occurs by having a few measures for each department or unit – with all measures contributing to the higher level measures for the department above, or for the organization as a whole

c. Measures are deployed to create information to monitor performance and improve the organization

d. The main purpose of a balanced scorecard is to create alignment throughout the organization to common goals and objectives – vision and mission

e. Strong communication is very important for the successful implementation of a balanced scorecard

f. Get some early wins and demonstrate the value of the balanced scorecard so that others will follow

g. Don't let the computer system rule the balanced scorecard – concentrate on decision-making by people

h. Measures should be simple, meaningful, valid and visible

i. Get rid of data that is confusing or not meaningful for decision making – but don't throw it all away – some data that you already have will be very useful – don't throw the baby out with the bathwater

j. Review and change measures as necessary – especially where processes are rapidly changing

k. Be conscious of the fact that it will take time for the culture of the organization to change

l. Start with measures from the top of the organization – what do key stakeholders want and how do we measure how well we are meeting their needs. Also include measures to track success in achieving strategic business plan goals

m. You will need "lead" and "lag" measures – the "lead" indicators tend to be measures of processes and will give early warning of outcomes (or "lag" measures. This will enable processes to be improved before poor outcomes are obtained.

n. Measurement per se is not the point – don't get caught up in the measurement trap – measurement is simply a means to an end

13. As for frontline customer service, there have been a large number of benchmarking projects networks conducted in Australia. Some key findings were:

a. Need to consider the entire value chain for customers – including internal and external suppliers – if you are not serving a customer then you should be serving

b. Organizations in Australia are developing sophisticated customer relationship management processes and are using computer systems to support efficient and effective delivery

c. Need to consider and increase service, quality and customer satisfaction and at the same time reduce costs to increase revenue and profits

d. Teams are very useful to deliver superior customer service – and team leaders are critical to the success of teams

e. Need "grains of sand" training for customer service staff – i.e. detailed training on procedures, products, system navigation, managing

relationships etc.

f. Balanced scorecards can be very useful to ensure all relevant matters are managed e.g. covering accessibility for customers, morale and development of employees, costs and revenue, customer satisfaction

g. Organizations in Australia are not happy now with high levels of customer satisfaction – they are concentrating on the small percentage of people who are dissatisfied and others who are not using the services – what can we do to capture them, and on those who are delighted – what are we doing to delight them so that we can also delight others and make more people advocates for us

h. Use of 360-degree feedback for all employees to help them improve

i. Use of procedures to reinforce good performance through recognition and reward

j. Use of agreed and understood values and related behaviors – only recruit people who have the right values (in preference to skills – you can train skills) and don't reward high performers who do not display appropriate behavior at all times

k. Look towards managing the business by process rather that hierarchical structure – it is the processes through which you relate to customers, not the hierarchy

l. Use methods to reduce stress for staff who are serving customers all day e.g. massages, fair % of time doing other work

m. Use the frontline staff to champion organizational change for customers

n. Technology is an enabler - not a driver for customer service and satisfaction

14. In the area of People Performance Management, there have also been a number of benchmarking studies conducted in Australia. Some key leading practices identified were:

a. Management concentrating on "below the green line" emotional management through building relationships with and between employees

b. Aligning balanced scorecard and relationship management with rational management e.g. of budgets etc.

c. Importance of having an agreed set of values and related behaviors and measure people's performance based on these – values are used a first measure of performance and in recruitment

d. Having action plans for people related to the organization's goals and objectives and managing performance so that people can track their contribution to the organization's success

e. Developing action plans for the development and skilling of people as well as career paths as part of the PPM process

f. Using 360 degree feedback compared to self review to identify performance gaps and development opportunities

g. Having leadership development programs for all staff – particularly senior

management and supervisors / team leaders

    h.   Using recognition and reward processes to reinforce and drive appropriate behaviors and achievement of goals

    i.   Aligning recognition and reward to appropriate organizational objectives

Frontline Customer Service Demonstration Project

15.   The demonstration project team summarized the information obtained from the 11 participating organizations on their frontline customer service systems and practices (see Annex 3). This information will be used to identify the learning needs and strengths of the participating organizations. The learning needs are specific issues or areas that participating organizations want to focus on in their learning from others so as to improve their frontline customer service system . The strengths are those factors, as defined by the participating organizations, that deliver value to their organizations or customers and address their learning needs.

16.   The project team also completed a draft template identifying the learning needs of participating organizations (see Annex 4). This template would be updated after the workshop based on further inputs from the participating organizations.

People Performance Management Demonstration Project

17.   The People Performance Management project team summarized the information obtained from 6 participating organizations on their PPM systems and practices (see Annex 5). Two other organizations from Malaysia and Indonesia are expected to submit their information after the workshop.

18.   The project team has also done a draft template on learning needs of participating organizations (see Annex 6). These learning needs are based on the information on practices adopted by rganizations in Malaysia that hosted a site visit by the workshop participants(Samsung SDI and Telecom Malaysia). The learning needs cover areas such as performance evaluation, career progression programs, alignment of the work done by employees and their performance targets to the organization's objectives, and the reward system. The learning needs will be updated after the completion of the data collection phase by the project team.

Balanced Scorecard Demonstration Project

19.   The Balanced Scorecard project team is in the process of collecting data and information on the balanced scorecard performance management systems in the participating organizations. At the workshop, 7 participating organizations have already their submitted their data and information, while 4 other participating organizations would do so after the workshop. Based on the information gathered, the project team develop ed a tentative list of learning needs (See Annex 7). These learning needs will be updated after the completion of the data collection phase.

FOLLOW-UP ACTIONS FOR PROJECT TEAMS

20.   It was agreed at the workshop that the project teams should finalize their learning needs and the identification of strengths to address these learning needs by January 2003. These best practices would be presented for sharing of the Fourth workshop in Manila in April 2003. The following preparatory work was required for participants from NPOs in the demonstration project teams for the fourth workshop:

    a.   To complete data collection by 30 Nov 2002

    b.   To finalize the survey questionnaire matrix by 15 Dec 2002

    c.   To finalize learning needs template by 7 Jan 2003

    d.   To identify selected participating client organizations with best practices to address the learning needs - Each project team is to select the top 3 client organizations which could be invited to present their best practices at the fourth workshop by 15 Jan 2003

21.   The NPOs participating in the demonstration projects should make a presentation at the fourth workshop on the following:

    a.   Challenges faced in implementing the methodology for the demonstration projects in their own countries and how these could be addressed.

    b.   Key findings of the demonstration project from their own countries.

    The project team leaders must prepare and present their overall project findings at the fourth workshop.

ANNEX

Annex 1–7: Various attachments to this report

<u>Annex 1</u>

PROGRAM SCHEDULE

DAY 1: 28 OCT 2002 (MONDAY)		
TIME	PROGRAM	FACILITATOR
9.00am – 10.00am	Orientation and Introduction • Welcome by APO/NPC Representative • Introduction & Update on the APO Best Practice Network (BPN) • Introduction on the APO BPN Website (http://www.aponet.org)	APO/NPC Darshan Singh / APO (Lee Kia Yoke)
10.00am – 10.30am	Group Photo & Tea Break	
10.30am – 11.00am	Presentation by People Performance Management Workgroup • Status of project • Outputs from the workgroup (e.g. finalised scope, data collection tool, summary of data gathered, etc) • Next Steps • Comments on Methodology Framework (What worked well and what could be improved)	People Performance Management Workgroup (Group Leader – Ms Shahuren Ismail)
11.00am – 12.00pm	Presentations by participating countries in the People Performance Management Project. • Participating Best Practice organizations in the country • Key findings from the participating organizations • Issues and challenges that need to be addressed in implementing the project	Participating countries – each country to take about 10 mins and presentation to be done on PowerPoint slides
12.00pm – 1.15pm	LUNCH	
1.15pm – 1.45pm	Presentation by Balanced Scorecard Workgroup Status of project Outputs from the workgroup (e.g. finalised scope, data collection tool, summary of data gathered, etc) Next Steps Comments on Methodology Framework (What worked well and what could be improved)	Balanced Scorecard Workgroup (Group Leader – Dr Phanit Laosirirat)

Time	Program	Facilitator
1.45p.m. – 3.00pm	Presentations by participating countries in the Balanced Scorecard Project. • Participating Best Practice organizations in the country • Key findings from the participating organizations • Issues and challenges that need to be addressed in implementing the project	Participating countries – each country to take about 10 mins and presentation to be done on PowerPoint slides
3.00p.m. – 3.30pm	Tea Break	
3.30p.m. – 4.00pm	Presentation by Customer Service Workgroup • Status of project • Outputs from the workgroup (e.g. finalized scope, data collection tool, summary of data gathered, etc) • Next Steps • Comments on Methodology Framework (What worked well and what could be improved)	Customer Service Workgroup (Group Leader – Normandy T. Nangca)
4.00p.m. – 5.00pm	Presentations by participating countries in the Customer Service Project. • Participating Best Practice organizations in the country • Key findings from the participating organizations • Issues and challenges that need to be addressed in implementing the project	Participating countries - each country to take about 10 mins and presentation to be done on PowerPoint slides
5.00p.m. – 5.45pm	Review of APO BPN Methodology Framework	Bruce Searles

DAY 2: 29 OCT 2002 (TUESDAY)		
TIME	PROGRAM	FACILITATOR
9.00am – 10.30am	Presentation on Leading Practices in Balanced Scorecard Management System • Korea • Japan • Australia	Dr Jong Dae Kim / Korean participant Japanese participant Bruce Searles
10.30am – 11.00am	TEA BREAK	
11.00am – 12.30pm	Presentation on Leading Practices in Customer Service • Philippines • Singapore • Australia	Philippines participant Singapore participant Bruce Searles

12.30pm – 1.30pm	LUNCH	
1.30pm – 3.00pm	Presentation on Leading Practices in People Performance Management • Thailand • Malaysia • Australia	FTPI/Client Organization Shahuren Ismail Bruce Searles
3.00pm – 3.15pm	TEA BREAK	
3.15pm – 4.15pm	Presentation on, "Diffusion of Best Practice: Implementation Methodology View." • How can we collect the best practices • How can we utilize the best practices by diffusion among customer organizations	Dr Jong Dae Kim
4.15pm – 5.15pm	Next Key Steps- Approaches to be adopted for data analysis and identification of strengths & learning needs for the 3 projects	Bruce Searles
5.15p.m. – 5.30pm	Briefing on the Site Visits to be done on Day 3	Shahuren Ismail/ Darshan Singh

DAY 3: 30 OCT 2002 (WEDNESDAY)		
TIME	PROGRAM	FACILITATOR
9.00am – 12.00am	Site Visit to Malaysian Company A (Company to present on Balanced Scorecard System & Customer Service)	NPC
12.00pm – 1.30pm	LUNCH	
2.00pm – 4.00pm	Site Visit to Malaysian Company B (Company to present on People Performance Management System)	NPC
7.30pm – 9.00pm	Site Visit Report Preparation by Project Groups	All Groups

DAY 4: 31 OCT 2002 (THURSDAY)		
TIME	PROGRAM	FACILITATOR
8.30am – 9.00am	Approach to be adopted for the Action Planning Session	Bruce Searles

9.00am – 10.30am	Action Planning- Project Group discussions on the specific actions to be taken to prepare for the sharing and learning session in April 2003	Bruce Searles, Dr Jong Dae Kim & Darshan Singh APO (Lee Kia Yoke)
10.30am – 11.00am	TEA BREAK	
11.00am – 12.00pm	Presentation by the Project groups on their action plans	Project Workgroup Leaders
12.00pm – 12.30pm	Workshop Review and follow-up actions	Darshan Singh APO (Lee Kia Yoke)
12.30p.m. – 2.00pm	Lunch and Workshop Closing	APO / NPC

Third Workshop of the APO Best Practice Network
(28 – 31 October 2002, Kuala Lumpur, Malaysia)

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