

# APQC's On-Site Two-Day Training Course Outline: Applying Benchmarking Skills in Your Organization

**B**enchmarking is a proven tool used to drive strategic and operational improvement, and identify and validate internal and external best practices. This two-day course introduces the latest benchmarking approaches and the skills, tools, and techniques necessary to conduct benchmarking initiatives

## Introduction

- » Welcome
- » An APQC overview including background in benchmarking and benchmarking leaders
- » Course objectives:
  - Define benchmarking as it relates to your organization
  - Prioritize the key business processes your organization needs to benchmark
  - Plan a benchmarking project that includes process documentation and key performance indicators
  - Understand how secondary research supports your selection of best-practice organizations
  - Develop a data-collection plan that will allow maximum learning from select best-practice organizations
  - Learn effective site-visit techniques

## Benchmarking: What Is It?

- » Explain what benchmarking is, what it can help accomplish, and ways it can be applied
- » Learn about the benchmarking model

## Getting Started: The Strategic Level

- » The big picture
- » Identify customers
  - Critical success factors
  - Measure level of satisfaction
- » Process Classification Framework<sup>SM</sup>
  - Core-process ranking
  - Criteria testing
- » Case study activity

## Planning the Study

- » Overview
- » Assembling a benchmarking team
  - Team selection criteria and structure
  - Roles and responsibilities
- » Understanding and documenting the process
  - Process flow
  - Relationship map
  - Cross-functional process map
- » Measuring your process performance
  - Four types of measures
  - Developing a family of measures
- » Scoping the study
  - Determining improvement opportunities
  - Other tools and techniques
- » Developing a project plan
- » Developing a data collection plan
- » Case study activity

## Collecting Information

- » Overview
- » Strategy for data collection
- » Secondary research overview
  - Sources of data and steps
  - Secondary research logic
  - Assessing partners' information
  - Partner profile
  - Contacting and screening
- » Data collection instruments
  - Screening survey
  - Detailed questionnaire
  - Site visit objectives
- » Helpful hints for your site visit
- » Case study activity

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# APQC's On-Site Two-Day Training Course Outline: Applying Benchmarking Skills in Your Organization (*continued*)

## Analyzing Data

- » Overview
- » Analysis pitfalls
- » Normalizing data
  - Comparing metrics
  - Normalizing data activity
  - Examining relationships
  - Gap analysis
- » Formulating implementation strategy
  - Cost-benefit analysis
  - Types of costs
- » The final report
  - Report format
- » Case study activity

## Adapting and Improving

- » Overview
- » Continuous improvement model
  - Implementation road map
- » Pilot the study
  - Measure
  - Monitor
- » Critical path method
- » Contingency planning
- » Recalibrate and recycle
- » Case study activity

## Legal and Ethical Issues

- » Overview
- » Behavioral choices
- » Code of conduct overview
  - Purpose
  - Conscience-raising questions
  - Preamble/Code of conduct
- » Good, bad, and questionable practices
- » Code of conduct dilemmas activity