



NEW
ZEALAND
**BUSINESS
EXCELLENCE**
FOUNDATION

Organisational Snapshot



WORKBOOK FOR NEW MEMBERS

The purpose of this booklet is for us to understand where your organisation is currently at, and how we can help you on your journey towards BUSINESS EXCELLENCE.

For any assistance with this document, please contact:

New Zealand Business Excellence Foundation

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An online template can be emailed – please request

NZBEF Organisational Snapshot



The purpose of this workbook is to identify your reasons for joining the NEW ZEALAND BUSINESS EXCELLENCE FOUNDATION and to help us better understand your organisation and its aspirations.

In itself, completing this document is a beneficial exercise in that you have the opportunity to take a “snapshot” of where the organisation is currently sitting. However more importantly, this document gives us a key insight as to how we can help you improve your organisation in your journey towards BUSINESS EXCELLENCE.

This document should be completed within one month of joining NZBEF. This timeframe is critical, as this document becomes the foundation and “starting point” for your organisation alongside other key documents, and acts as one of the baseline measures for your organisation’s success in partnership with us.

This document can be completed by the CEO or a senior manager, or alternatively it can be a good exercise to delegate it out to key personnel as this provides an insight into how much your key personnel know about the organisation and also provides them with an insight into other areas of the business.

Please do not leave any fields blank. Use the codes below for questions that you do not wish to / cannot answer.

Codes for Fields:

N/A	Information is <u>not relevant / not applicable</u> to our organisation
UNS	I am <u>unsure</u> of the answer to this question (i.e. you do not currently measure this, or you cannot find / do not have this information available)

Please keep in mind that while we offer the codes above for blank fields, the more information you do provide us - the better we can assist you. If you would like any assistance or clarification in completing this document, feel free to contact us via any one of methods provided on Page 2.

- ALL INFORMATION PROVIDED IN THIS DOCUMENT WILL REMAIN STRICTLY CONFIDENTIAL -

Please endeavour to submit an electronic (preferable) or physical copy of the completed document to us by the following date:

Submission Date _____

Section 1: Business Description

ADMINISTRATIVE DETAILS	PLEASE COMPLETE THE FIELDS BELOW
Organisation	
Name of representative completing this form	
Role / Title	
Email Address	
Best Contact Number	

Please list the name, role, department (if applicable) and email address of the key personnel that will be contributing to driving the organisation's Business Excellence / Business Improvement programme:

FULL NAME	TITLE	DEPARTMENT	EMAIL

BUSINESS DESCRIPTION	PLEASE COMPLETE THE FIELDS BELOW
<p>What are your business's main PRODUCTS and SERVICES?</p>	
<p>By what METHODS do you DELIVER these products and services to your customers?</p>	
<p>What is your stated VISION?</p>	
<p>What is your stated MISSION?</p>	
<p>What are your stated VALUES?</p>	
<p>What specific REGULATORY REQUIREMENTS apply to your business / products and/or services?</p>	

BUSINESS DESCRIPTION	PLEASE COMPLETE THE FIELDS BELOW
<p>Please outline your BUSINESS STRUCTURE and/or attach a copy of your ORGANISATIONAL PROFILE (if available).</p>	
<p>What are your key CUSTOMER GROUPS and MARKET SEGMENTS?</p>	
<p>What are your customers KEY REQUIREMENTS for the products and / or services that you deliver?</p>	
<p>What are your most important types of SUPPLIERS?</p>	
<p>What are your most important types of PARTNERS?</p>	
<p>What are your most important types of DISTRIBUTORS?</p>	
<p>Do you have your key business processes MAPPED / CHARTED? If so please provide a brief description of the method used.</p>	

Section 2: Business Objectives

BUSINESS OBJECTIVES	OBJECTIVES	TARGETS
<p>Please outline your organisation's <u>current</u> KEY BUSINESS OBJECTIVES and TARGETS – any additional detail you can provide would be beneficial.</p>	1.	
	2.	
	3.	
	4.	
	5.	

BUSINESS OBJECTIVES	PLEASE COMPLETE THE FIELD BELOW
<p>Does your organisation perform any type of STRATEGIC ANALYSIS (i.e. SWOT, PESTLE, PORTER'S etc.) and if yes, how often / when?</p>	

BUSINESS DESCRIPTION	PLEASE COMPLETE THE FIELDS BELOW
<p>What is your organisation's PRIMARY OBJECTIVE / KEY FOCUS in becoming a member of NZBEF? <i>(your primary reason for joining)</i></p>	
<p>How will this be MEASURED? <i>(what indicators will you measure to know that you have met this objective?)</i></p>	
<p>What is the current BASELINE MEASURE for this? <i>(i.e. current status)</i></p>	
<p>WHEN is this objective expected to be MET? <i>(please specify a date if possible)</i></p>	
<p>On a scale of 1-5 <i>(with 5 being high and 1 being low)</i>, HOW IMPORTANT is this objective in the context of your strategic focus?</p>	
<p>What is your organisation's SECONDARY OBJECTIVE / KEY FOCUS in becoming a member of NZBEF? <i>(secondary reason for joining)</i></p>	
<p>How will this be MEASURED? <i>(what indicators will you measure to know that you have met this objective?)</i></p>	
<p>What is the current BASELINE MEASURE for this? <i>(i.e. current status)</i></p>	
<p>WHEN is this objective expected to be MET? <i>(please specify a date)</i></p>	
<p>On a scale of 1-5 <i>(with 5 being high and 1 being low)</i>, HOW IMPORTANT is this objective in the context of your strategic focus?</p>	

Section 3: Business Challenges

BUSINESS CHALLENGES	PLEASE COMPLETE THE FIELDS BELOW
<p>Who are your KEY COMPETITORS (if appropriate)?</p>	
<p>What DIFFERENTIATES you from your competitors? <i>(what is your point of difference or what competitive advantage do you enjoy?)</i></p>	
<p>What are your current key business, operational and human resource STRATEGIC CHALLENGES, or, are there any pending CHANGES that may affect your competitive situation?</p>	
<p>What business improvement methodologies do you currently use? <i>(i.e. lean, 6 Sigma, ISO, etc. or other process improvement tools)</i></p>	
<p>Please detail the specific services that NZBEF provides, or may be able to access that you or your organisation are particularly interested in.</p>	

Section 4: Further Information

Please list / detail any awards or recognition that your organisation, individuals, or departments within your organisation have received to date:

DATE	BRIEF DESCRIPTION

Please give a brief overview of your current advertising methods. Please include any relevant URL links to your social media sites in order that we can follow you.

TYPE	BRIEF DESCRIPTION

Thank you for completing this document. The next step from here is to complete the self-assessment of your organisation. We will arrange a meeting to discuss the information / results of both this document and the assessment.

Please feel free to use the space on this page for any further comments or feedback that you feel is relevant to your organisation's journey with the NEW ZEALAND BUSINESS EXCELLENCE FOUNDATION.

FURTHER COMMENTS / RELEVANT FURTHER INFORMATION OR QUESTIONS

Empty space for further comments or feedback.



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