



Applications of Benchmarking for Analysis Projects

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WHAT IS TRADITIONAL BENCHMARKING?

■ Traditional definition:

“A continuous, systematic process for evaluating the products, services, and work processes of organizations that are recognized as representing best practices for the purpose of organizational improvement.”



WHAT IS TRADITIONAL BENCHMARKING? (continued)

- **Main Types:** Internal, Competitive, & Functional
- **Corporate or company comparison**
- **Financial or large systems focused**
- **Product or process focused**
- **Best practices focused**
- **Very structured and high level**
- **Team activity**



WHAT IS BENCHMARKING FOR ANALYSIS?

- Targets an IE type analysis (investigation) project
- Tends to be part of a larger analysis project
- More focused, specific problems for comparison
- Looks at similar and dissimilar activities
- Can be more tour and interview focused



WHAT IS BENCHMARKING FOR ANALYSIS? (continued)

- Can be done locally (and later expanded)
- Can be done very quickly or take considerable time
- Usually answers specific questions
- Looks for what to do
- Frequently finds what not to do
- Findings are put into context and reviewed for fit



WHAT ARE TYPICAL RESULTS?

- Answers to your baseline questions
- Detailed notes and items learned during the sessions
- A variety of conditions and applications identified and evaluated
- A lot of new ideas that can be folded into your project's recommendations
- Some background conditions and issues to consider



WHAT ARE TYPICAL RESULTS? (continued)

- Real examples of what others have implemented and tried
- Contacts for follow-up if you plan to implement something they did
- A clear understanding about what others have done



WHEN DO YOU DO IT?

- If you have time in your project plan
- Whenever you need comparisons
- Whenever you are asked to do an audit of an operation
- Whenever you need to provide implementation information
- After you fully understand your own organization



WHEN DO YOU DO IT?

(continued)

- Not too late in your project plan, so you can use the findings
- Whenever your most difficult to arrange tours can accommodate you



WHAT DO YOU FOCUS ON?

- Specific items that you want to compare and are curious about
- Any areas that you know are your organizations' weakness or their organizations' strength
- Anything that they want to show you
- Cover your basic questions at each place visited



6. WHAT DO YOU FOCUS ON? (continued)

- A complete tour and an opportunity to ask questions from different levels of users
- Specific items that are comparable (maybe only a small portion of your overall process)
- Establish a good dialog for future sharing



HOW DO YOU STRUCTURE IT?

- Know your own organization's conditions really well
- Answer your benchmarking questions on your own organization first
- Start with what you would like your deliverables to look like
- Structure your interview questions
- Determine who you think would be a good benchmark comparison



HOW DO YOU STRUCTURE IT? (continued)

- Find a good contact at each place
- Send them your list of questions and information you seek
- Give yourself plenty of time to schedule the tours/meetings
- Don't schedule your most important tour first



HOW DO YOU STRUCTURE IT? (continued)

- Leave enough time between tours to write up your notes
- Don't spread the benchmarking sessions out too long



HOW DO YOU DO THE WORK?

- Start with good interview questions
- Try to take some of your customers along on the tours
- At the start of each tour/interview restate what you are hoping to see and why you are there
- Be as open and receptive as possible as you see and hear what each visited organization has done



HOW DO YOU DO THE WORK? (continued)

- Ask follow-up questions and keep your tour guide/host focused
- Go back over critical items or items to be clarified
- Take detailed notes
- Make sure you can hear your tour guide
- Maybe start out in an office to ask some orientation questions first, then the tour, then a follow-up session back in the office



HOW DO YOU DO THE WORK? (continued)

- Write up each tour's notes and discuss the tour findings as a group, immediately after the tour
- Keep good organized records as you complete the tours
- Write up the separate benchmarking conclusions
- Integrate your conclusions into your report's recommendations



HOW DO YOU ANALYZE THE RESULTS?

- Summarize each tour/interview as nothing but observed facts, first
- Discuss as a group everything you observed and heard and make sure you have consensus among your team
- Identify the best practices, where they occurred and items that seem to be the most applicable to your organization



HOW DO YOU ANALYZE THE RESULTS? (continued)

- Identify the steps they used to get to their best practices, if known (including things they tried but later abandoned)
- Identify worst practices, where they occurred and compare to problems in your organization
- Put any comparison figures into a summary table



HOW DO YOU ANALYZE THE RESULTS? (continued)

- Determine the best items for application and write down the steps required to introduce the change
- Have a separate benchmarking section of your report (maybe also a separate Appendix) that integrates into your recommendations



SOME CLOSING COMMENTS

- Look for benchmarking opportunities
- Don't pass up an opportunity
- Give yourself time to get it done
- Be methodical and have a good plan with prepared questions
- Take your customer along on tours & discuss it immediately afterwards



SOME CLOSING COMMENTS (continued)

- Keep your deliverables in mind at all times
- Write the summary in layers, stay with the facts
- Integrate the best ideas into your recommendations
- Encourage follow-up visits during implementation
- Share all information you can with your tour hosts



SOME CLOSING COMMENTS (continued)

- Keep and review your past benchmark write-ups and formats
- Keep good contact lists (don't over use anyone)
- Be willing to help others benchmark
- Just Do It! and learn your own techniques



SOME CLOSING COMMENTS (continued)

- Improve your knowledge with books on benchmarking
- Go on tours whenever you can and keep notes for future reference

